

Certified Application Counselor Designated Organization (CDO) Application FAQs

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Contents

What are the steps to apply?	2
I'm an existing CDO but didn't receive an invitation to apply, what should I do?	2
I've submitted an application or signed agreement but I haven't heard anything, what should I do?.....	2
I'm an existing CDO in good standing, can I continue to assist consumers while my CDO application is being processed?.....	3
I've received a Preliminary Approval; what does that mean, what should I do next?.....	3
I've received a Preliminary Approval and never sent in the Signed Agreement, what should I do?	4
I've received my welcome packet, does that mean I've completed the reapplication process?	4
I'm having technical issues with the CDO Application, what should I do?	4
What happens if my organization doesn't reapply?	4
How do I update my contact information with the CAC Program?	5
How do I withdraw from the CAC Program?	5
I have additional questions about CDO reapplication process, who should I reach out to?	5
How can I make sure I get all CAC and Marketplace assister email updates?	6

What are the steps to apply?

1. Access and complete the CDO Application here: <https://mats.secure.force.com/CDOApplication/>.
2. CMS will review the application and issue a Preliminary Approval email to applicants that meet CAC Program Requirements. The Preliminary Approval includes guidance for the applicants to access and submit the signed CMS-CDO Agreement. **Please note the Preliminary Approval does NOT approve the applicant as a CDO. Applicants are NOT approved as CDOs until the Final Approval email with “CDO Agreement Approved” in the subject line has been sent.**
3. Access and submit the Signed Agreement using guidance from the Preliminary Approval email.
4. CMS will review the CMS-CDO Agreement and issue a Final Approval email to applicants that meet CAC Program Requirements. This Final Approval email, which organizations should keep for their records, will contain the CDO Welcome packet with guidance on next steps for operating as an Approved CDO for Plan Year 2019.

I'm an existing CDO but didn't receive an invitation to apply, what should I do?

As of June 11, 2018, CMS has invited all existing CDO's to reapply to the CAC program. Email invitations were sent from cacquestions@cms.hhs.gov to all contacts currently on file for each existing CDO organization. Your organization may submit a CDO Application [here](#).

If your organization did not receive an invitation and believe that you are a current CDO in good standing, please (1.) Check your junk/spam folder for your invitation; and, (2.) Check with individuals within your organization to determine if they received the invitation. To ensure you receive communication moving forward, please add CACQuestions@cms.hhs.gov to your contacts and spam filters. We also encourage you to update your contact information with CMS by reaching out to cacquestions@cms.hhs.gov and providing: (1.) Organization Name, (2.) CDO ID Number, (3.) Organization Address, (4.) Previous Contacts, and (5.) Name and Email Address of the Current Contacts.

I've submitted an application or signed agreement but I haven't heard anything, what should I do?

CMS will immediately confirm receipt of a submission (Application, Agreement, Additional Information, etc.) with a confirmation receipt email. Be sure to check your junk/spam folder for the confirmation receipt as well as check with individuals within your organization to determine if they received the confirmation. If the confirmation receipt cannot be located, then reach out to CACQuestions@cms.hhs.gov.

CMS will also provide guidance (when applicable) regarding the next steps applicants should take once the submission has been reviewed. Please note that CMS may take up to 30 business days to review and process each submission (i.e., Agreement, Application or Supporting Document), so if you've received a confirmation receipt please know CMS is working to process your submission.

If you have submitted documentation in support of your application and received a confirmation receipt but are still waiting on a Preliminary or Final Approval after 30 business days, send an inquiry to cacquestions@cms.hhs.gov.

I'm an existing CDO in good standing, can I continue to assist consumers while my CDO application is being processed?

Yes, applicants that are existing CDOs, in good standing with CMS may continue to assist consumers while their CDO application is being reviewed and processed by CMS. If you're unsure if your organization is an existing CDO in good standing, send an inquiry to cacquestions@cms.hhs.gov.

Applicants that are NOT existing CDOs in good standing with CMS are prohibited from assisting consumers while their application is being reviewed and processed. For these applicants, *please note that receiving a Preliminary Approval does NOT mean that your organization is an approved CDO or grant permission to begin assisting consumers. Organizations are prohibited from assisting consumers without a current and valid CDO approval. Your organization is not an approved CDO until you receive final approval in an email with "CDO Agreement Approved" in the subject line.*

I've received a Preliminary Approval; what does that mean, what should I do next?

After an organization submits an application to become a CDO, CMS will issue a Preliminary Approval to applicants that meet CAC Program Requirements. Receiving a Preliminary Approval means the applicant met CAC Program Requirements and is invited to submit the Signed CMS-CDO Agreement for CMS' review and consideration. The Preliminary Approval includes guidance for the organization to access and submit the signed CMS-CDO Agreement, which is the next step in the application process.

Please note that receiving a Preliminary Approval does NOT mean your organization is approved as a CDO. Your organization is not an approved CDO until you receive final approval in an email with "CDO Agreement Approved" in the subject line.



I've received a Preliminary Approval and never sent in the Signed Agreement, what should I do?

Organizations that submitted an application and received a Preliminary Approval but did not submit the signed CMS-CDO Agreement should submit the document immediately. CMS will send multiple follow-up requests to the applicant to submit the signed CMS-CDO Agreement and revoke Preliminary Approvals of organizations that fail to proceed on to the Signed Agreement. These applications will ultimately be rejected once the application window has closed.

The Preliminary Approval includes guidance for the organization to access and submit the CMS-CDO Signed Agreement, which is the next step in the application process. If you can't locate your Preliminary Approval email with guidance regarding the signed CMS-CDO Agreement, reach out to cacquestions@cms.hhs.gov. *Please note that receiving a Preliminary Approval does NOT mean your organization is approved as a CDO. Your organization is not an approved CDO until you receive final approval in an email with "CDO Agreement Approved" in the subject line.*

I've received my welcome packet, does that mean I've completed the reapplication process?

Yes, once an applicant has submitted both the Application and Agreement, and received approvals for both it is officially a CDO. CMS will send an approval email with "CDO Agreement Approved" in the subject line. This communication will contain a Welcome Packet with important guidance for the next steps for operating as a CDO.

The Welcome Packet contains key information for operating as a CDO for Plan Year 2019 (like your new CDO ID#), so be sure to access the Welcome Packet and follow its guidance as soon as you receive it.

I'm having technical issues with the CDO Application, what should I do?

If you encounter technical issues when accessing the CDO application or agreement, email CACQuestions@cms.hhs.gov. In your email, provide the steps you took and a screenshot displaying the issue you experienced.

What happens if my organization doesn't reapply?

Any organization that wishes to assist consumers with CACs for Plan Year 2019 must apply to become a CDO. Existing CDOs that fail to reapply during the CAC Program re-application

window will be de-designated as CDOs and will not be permitted to certify CACs or assist consumers once the application window has closed.

How do I update my contact information with the CAC Program?

Existing CDOs can update their contact information with CMS by reaching out to cacquestions@cms.hhs.gov and providing: (1.) Organization Name, (2.) CDO ID Number, (3.) Organization Address, (4.) Previous Contacts, and (5.) Name and Email Address of the Current Contacts.

How do I withdraw from the CAC Program?

If your organization wishes to withdraw from the CAC Program, please do the following:

1. Send your formal written request to CMS at CACQuestions@cms.hhs.gov. The written request should include your CDO ID and the date when your CMS-CDO agreement should terminate.
2. Your organization should notify its staff and volunteers that, as of the effective date of termination of its agreement with CMS, they will no longer be certified to provide enrollment and application assistance to consumers. You should ensure that neither your organization nor your staff or volunteers hold themselves out to the public as a designated organization or as a CAC, respectively, after the effective date of termination.
3. Please keep in mind that consumer consent documents must be appropriately secured and retained for six (6) years. Your organization's duty to protect and maintain the privacy and security of personally identifiable information (PII) survives its withdrawal from the CAC Program. Please refer to your organization's agreement with CMS, including the appendices to the agreement, for guidance on the requirements for record keeping of PII and personal health information (PHI).
4. You must submit a request to remove your organization's listing(s) from Find Local Help at <https://localhelp.healthcare.gov/update-organization-information/#/>.

I have additional questions about CDO reapplication process, who should I reach out to?

CDO Application technical assistance webinar recordings, user guides, and more can be found [here](#). If you further questions regarding the CDO Application, please reach out to cacquestions@cms.hhs.gov.

How can I make sure I get all CAC and Marketplace assister email updates?

Update your contact information with the CAC Program by reaching out to cacquestions@cms.hhs.gov and providing: (1.) Organization Name, (2.) CDO ID Number, (3.) Organization Address, (4.) Previous Contacts, and (5.) Name and Email Address of the Current Contacts.

Don't forget to update your contact information with the Marketplace Assister Listserv by sending a request to the Assister Listserv inbox (ASSISTERLISTSERV@cms.hhs.gov). Write "Add to listserv" in the subject line and please include the email address(es) that you would like to add in the body of your email.

