CDO Application Web Form Troubleshooting Frequently Asked Questions (FAQs)

What is in This Document

This document includes an Overview of Troubleshooting FAQ, along with frequently asked questions about Application Submission, Post-Application Submission, and Troubleshooting guidance.

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Overview of Troubleshooting FAQ

This document provides answers for frequently asked questions about using the Certified Application Counselor Designated Organization (CDO) Application web form to submit a CDO application to the Centers for Medicare & Medicaid Services (CMS), using the CDO Organizational Maintenance web form, and other process-related questions.

After you complete the CDO application process, you can find additional information on submitting Certified Application Counselor (CAC) rosters, Assigning CAC IDs, Annual Certification Training on the Marketplace Learning Management System (MLMS) and more on the CDO Program web page.

For a video that discusses the CDO application process, access the CDO Learning Series – CDO Application video.

For a step-by-step demonstration of the CDO Application web form, access the CDO Application Demonstration video.

For step-by-step instructions about using the CDO Application web form, review the CDO Application Web Form User Guide.

For more resources about the CDO application process, access the certified application counselor designated organization (CDO) application information web page.

Application Submission

What steps must my organization take to become a CDO?

To apply to become a CDO during the CDO Application Open Season, you must:

1. Access and complete the CDO application using the CDO Application web form. CMS will review your application and will send a Preliminary Approval email to applicants that meet CDO program requirements. The Preliminary Approval email includes guidance about how to access and submit a signed CMS-CDO agreement. Your organization will not receive final approval until you complete and return a signed CMS-CDO agreement and receive formal approval from CMS.

2. Access and submit a signed CMS-CDO agreement using guidance provided in the Preliminary Approval email. CMS will review your signed CMS-CDO agreement and will send a Welcome Packet email to applicants that meet CDO program requirements. You should keep a copy of your Welcome Packet email, your CDO ID, contact information, and the counter signature page of the CMS-CDO agreement for your records.

If CMS sends an email requesting additional information during the application process, you must provide the requested information to proceed in the application process. CMS will not process your application without this information.

What is the CDO Application web form?

The CDO Application web form is the platform organizations use to submit CDO applications to CMS. Any organization operating in an FFM state seeking to provide CAC enrollment assistance to consumers must apply to become a CDO, and enter into an agreement with CMS using the CDO Application web form. The CDO Application web form link is only accessible during the CDO Application Open Season, which takes place each summer.

To learn more about the CDO application process and CDO Program requirements, go to the CDO Program web page.

Who can access the CDO Application web form?

Initially, anyone from your organization can access the CDO Application web form to submit the CDO application. CMS requests that each organization has at least two unique contacts: an Organization Senior Official and a CAC Project Director. The person from your organization who submits the CDO application may or may not be one of these two contacts.

While you complete the CDO application you will designate up to three contacts to correspond with CMS on behalf of your CDO moving forward. These three contacts can include the two unique contacts identified when initially accessing the CDO Application web form.

Are there other resources available to help users complete the CDO Application?

Before you get started, reference the Quick Start Guide attached to the CDO Application web form to understand what information you need to complete the CDO application. You can also reference the Guidance document attached to the CDO Application web form to review step-by-step instructions for completing the CDO Application web form.

I am not getting emails from CACQuestions@cms.hhs.gov, what do I do?

Please check your spam/junk folder. To ensure you receive communication from CMS moving forward, please add "CACQuestions@cms.hhs.gov" to your contacts and spam filters.

Post-Application Submission

Where can I go for information after I submit a CDO application?

To receive a status of your application or to submit additional information requested by CMS, email us at CACQuestions@cms.hhs.gov.

How long does it take CMS to review my initial application and issue a preliminary approval?

CMS's CDO Program Office will review your CDO application within ten (10) business days of receipt. We review applications in the order in which they are received.

What do we do after receiving a Preliminary Approval email?

After you submit an initial CDO Application, CMS will review the application. CMS will send a Preliminary Approval email to organizations that meet program requirements; however, at this stage, the application process is not complete.

The Preliminary Approval email includes a link to the CDO Organizational Maintenance web form and guidance for proceeding with the application process. After receiving a Preliminary Approval email, your organization should access the CDO Organizational Maintenance web form to submit a signed CMS-CDO Agreement.

Receiving a Preliminary Approval email does NOT mean CMS approves your organization as a CDO. Your organization is not an approved or designated CDO until you complete and return a signed CMS-CDO Agreement and you receive a Welcome Packet email from CMS that includes your CDO ID and the counter signature page of the CMS-CDO Agreement with the effective date of your agreement and two-year CDO certification period.

Can anyone from my organization sign the CMS-CDO agreement?

No, only an official authorized to represent and bind your organization for purposes of the CMS-CDO agreement should sign the CMS-CDO agreement.

If the responsible entity changes after CMS approves your organization as a CDO, your organization must update its information on record with CMS and submit a new signed CMS-CDO agreement using the CDO Organizational Maintenance web form.

How do I submit the signed CMS-CDO Agreement?

Your organization's unique contacts may access the CDO Organizational Maintenance web form to upload a signed CMS-CDO Agreement.

To generate an agreement using the CDO Organizational Maintenance web form:

1. Log in to the CDO Organizational Maintenance web form.
2. In the Agreement PDF table, select the Add or Replace link.
3. On the Attestation and Agreement Upload page, select the Print PDF Agreement button.
4. Print the agreement and obtain the Organization Senior Official's signature.

To upload an agreement:

1. In the Agreement PDF table on the CDO Summary page, select the Add link.
2. On the Attestation and Agreement Upload page, select the Browse button under the Upload a File section.
3. In the pop-up window, navigate to the location of the saved PDF version of the signed agreement, select the file, and select the OK button.
4. Select the Upload Attachment button.
5. In the Attachment Summary table, select the View link to open the file. The web form will display a warning message if the agreement was not uploaded.
6. Select the Save and Return button.
7. Back on the CDO Summary page, select the Submit button.

On the Confirmation page, select the PDF button to generate a PDF confirmation containing the information submitted. CMS recommends that you print and save this document for your records.

Your contacts will also receive an acknowledgement email confirming receipt of your CMS-CDO Agreement.

I submitted the signed CMS-CDO Agreement and it keeps getting rejected, why?

CMS will not accept your signed CMS-CDO Agreement if you did not submit pages 1 through 12 of the agreement, or if any of the following information is missing or does not match your organization's approved corresponding CDO application:

- Service location(s)
- Signature of Organization Senior Official
- Organization Senior Official Name and Title
- Date of signature
- Organization Name
- Corresponding Application ID
- Organization address

Do I need to upload the entire CMS-CDO Agreement, or just the signature page?

When you submit your CMS-CDO Agreement, make sure to include pages 1 through 12, which includes the signature page, for review.

What is the difference between the CDO Application web form and CDO Organizational Maintenance web form?

The CDO Application web form is the platform organizations use to submit CDO applications to CMS. Any organization operating in an FFM state seeking to provide CAC enrollment assistance to consumers must apply to become a CDO, and enter into an agreement with CMS using the CDO Application web form. The CDO Application web form link is only accessible during CMS's Open Season, which takes place each summer.

Organizations that receive CMS approval on their CDO application will gain access to the CDO Organizational Maintenance web form, which is the platform organizations use to:

- Submit an initial signed CMS-CDO Agreement

- Keep their CDO record up to date

- Add and maintain their roster of CACs

- Submit a new signed and dated CMS-CDO Agreement to renew their CDO status every two (2) years

How do I get access to the CDO Organizational Maintenance web form?

If CMS approves your application, we will send a Preliminary Approval email to your contacts on file. The Preliminary Approval email contains a link to the CDO Organizational Maintenance web form where you must upload your signed CMS-CDO agreement.

How long does it take CMS to review my signed CMS-CDO Agreement?

CMS's CDO Program Office will review your CMS-CDO Agreement within five (5) business days of receipt. We review agreements in the order in which they are received.

After CMS completes our review, we will send a Welcome Packet email that includes your certified application counselor designated organization (CDO) ID, the counter signature page of the CMS-CDO Agreement with the effective date of the agreement and two-year CDO certification period, and important guidance for operating as a CDO.

What happens if I do not submit the signed CMS-CDO Agreement?

New applicants that do not submit a signed CMS-CDO Agreement after receiving Preliminary Approval from CMS, will not become a CDO. Only organizations that submit their signed CMS-CDO Agreement during the CDO Application Open Season and receive a CDO ID from CMS can certify staff or volunteers as CACs. Submitting a CDO application is only the first step of the application process. To complete the process, one of your organization's contacts must submit the signed CMS-CDO Agreement for CMS review and your organization must receive final approval from CMS.

Existing CDOs must renew before your agreement and CDO certification expires, or you will become inactive. Your organization will need to re-apply since your CDO ID will no longer be valid. Per the CMS-CDO Agreement, you must also inform your certified application counselors (CACs) to stop providing enrollment assistance as CACs.

What happens after I submit the signed CMS-CDO Agreement?

CMS's CDO Program Office will review your CMS-CDO Agreement within five (5) business days of receipt. If your CMS-CDO Agreement requires revision and/or resubmission, CMS will send an email to your contacts on file containing the information needed and instructions for resubmitting the agreement.

If CMS approves your CMS-CDO Agreement, we will send a Welcome Packet email that includes your CDO ID, counter signature page with the effective date of the agreement and two-year CDO certification period, and important guidance for operating as a CDO.

Troubleshooting

What should we do if we experience technical issues with the CDO Application web form?

If you encounter technical issues when accessing the CDO Application web form, email us at CACQuestions@cms.hhs.gov and include the list of steps you are taking prior to receiving the error message, along with an attached screenshot.

What if our organization does not have a company email?

If your organization does not have a general company email address, please provide the email address of one of your organization's unique contacts included on your CDO application. CMS requests a company email address to have a consistent contact within the organization. CMS will not publish this email address for public use.

Why am I receiving a "CDO Organization Found" error when I enter my organization's information?

You are receiving a CDO Organization Found error message because CMS received an application from your organization and it is either under review or your organization is already approved as a CDO.

CMS designates your organization for two years; so if you were already approved and are within your two-year certification period, you do not need to reapply to operate as a CDO at this time.

If you are not sure of your organization's CDO status, you can send a message to us using the comment field on the CDO Organization Found page. We will respond via CACQuestions@cms.hhs.gov.

What if our organization does not have two unique contacts to fulfill the Organization Senior Official and CAC Project Director roles?

Please email us at CACQuestions@cms.hhs.gov to discuss your situation.

What if the CDO Application web form does not let me add my state in the Service Location section?

If your state operates a State-based Marketplace (SBM) or State-based Marketplace using the Federal Platform (SBM-FP), the CDO Application web form will not list your state in the Service Location state picklist.

If you are not sure what Marketplace type your state operates, email us at CACQuestions@cms.hhs.gov.