CERTIFIED APPLICATION COUNSELOR DESIGNATED ORGANIZATION

CDO Application Web Form User Guide

June 1, 2020
# Table of Contents

1. Introduction ............................................................................................................................ 1
   1.1. Helpful Resources & Tips Before Getting Started .......................................................... 1
   1.2. CDO Application Process Overview ............................................................................... 2
2. Welcome Page .......................................................................................................................... 3
3. Submitter Contact Information ............................................................................................... 4
4. Existing Organization Information .......................................................................................... 5
   4.1. Organization Found ........................................................................................................ 7
   4.2. No Existing Organization Found ..................................................................................... 9
5. Organization Contact Information .......................................................................................... 11
6. Organization Headquarters Information ................................................................................ 15
7. Service Locations .................................................................................................................... 17
8. Additional Organization Details ............................................................................................ 21
9. CDO Summary ....................................................................................................................... 24
10. Confirmation Page ................................................................................................................ 26
11. Next Steps ............................................................................................................................. 27
# Table of Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CDO Application Welcome Page</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>Submitter Contact Information Continue Button</td>
<td>4</td>
</tr>
<tr>
<td>3</td>
<td>Existing Organization Information Page FEIN</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>Existing Organization Information Page Previously Approved as CDO</td>
<td>5</td>
</tr>
<tr>
<td>5</td>
<td>Existing Organization Information Page Continue Button</td>
<td>6</td>
</tr>
<tr>
<td>6</td>
<td>Organization Found Page Submit Comments Button</td>
<td>8</td>
</tr>
<tr>
<td>7</td>
<td>Organization Found Page Approved Submit Comments Button</td>
<td>8</td>
</tr>
<tr>
<td>8</td>
<td>Organization Found Page Exit Button</td>
<td>9</td>
</tr>
<tr>
<td>9</td>
<td>No Existing Organization Found Page Submit Comments Button</td>
<td>10</td>
</tr>
<tr>
<td>10</td>
<td>No Existing Organization Found Page Exit Button</td>
<td>10</td>
</tr>
<tr>
<td>11</td>
<td>Organization Contact Information Page Organization Senior Official Contact Information</td>
<td>12</td>
</tr>
<tr>
<td>12</td>
<td>Organization Contact Information Page CAC Project Director Contact Information</td>
<td>12</td>
</tr>
<tr>
<td>13</td>
<td>Organization Contact Information Page Secondary Contact Information Checkbox</td>
<td>13</td>
</tr>
<tr>
<td>14</td>
<td>Organization Contact Information Page Secondary Contact Information Fields</td>
<td>13</td>
</tr>
<tr>
<td>15</td>
<td>Organization Contact Information Page Continue Button</td>
<td>14</td>
</tr>
<tr>
<td>16</td>
<td>Organization Headquarters Information Page Organization Information</td>
<td>15</td>
</tr>
<tr>
<td>17</td>
<td>Organization Headquarters Page Organization Headquarters Address</td>
<td>16</td>
</tr>
<tr>
<td>18</td>
<td>Organization Headquarters Information Page Continue Button</td>
<td>16</td>
</tr>
<tr>
<td>19</td>
<td>Service Locations Page Map of Marketplaces Link</td>
<td>17</td>
</tr>
<tr>
<td>20</td>
<td>Map of Marketplaces</td>
<td>18</td>
</tr>
<tr>
<td>21</td>
<td>Service Locations Page State Selection</td>
<td>18</td>
</tr>
<tr>
<td>22</td>
<td>Service Locations Page Counties Selection</td>
<td>19</td>
</tr>
<tr>
<td>23</td>
<td>Service Locations Page Update Table Button</td>
<td>19</td>
</tr>
<tr>
<td>24</td>
<td>Service Locations Page Continue Button</td>
<td>20</td>
</tr>
<tr>
<td>25</td>
<td>Additional Organization Details Page Primary Organization Type</td>
<td>21</td>
</tr>
<tr>
<td>26</td>
<td>Additional Organization Details Page Organization Specialty</td>
<td>22</td>
</tr>
<tr>
<td>27</td>
<td>Addition Organization Details Page Intended Enrollment Assistance Type</td>
<td>22</td>
</tr>
<tr>
<td>28</td>
<td>Additional Organization Details Page Organization Current Status</td>
<td>22</td>
</tr>
<tr>
<td>29</td>
<td>Additional Organization Details Page Continue Button</td>
<td>23</td>
</tr>
<tr>
<td>30</td>
<td>CDO Summary Review Page Contact Information</td>
<td>24</td>
</tr>
</tbody>
</table>
Figure 31: CDO Summary Review Page Headquarters, Service Locations, Additional Organization Information .......................................................... 25
Figure 32: CDO Summary Page Submit Button ........................................................................... 25
Figure 33: Confirmation Page PDF Option .................................................................................. 26
Figure 34: Confirmation Page Exit Application Button ................................................................. 27
1. Introduction

Certified application counselor designated organizations (CDOs) are a vital component of the assister community. In the Federally-facilitated Marketplaces (FFMs), CDOs oversee certified application counselors (CACs) who are trained and able to help consumers seeking health insurance coverage options through an FFM.

Organizations that wish to become CDOs designated by the Centers for Medicare & Medicaid Services (CMS) to serve in an FFM must submit an online application and enter into an agreement with CMS.

The CDO application allows qualified organizations to apply to become a CDO with CMS. In an FFM, CMS designates organizations that meet specific eligibility criteria as CDOs.

1.1. Helpful Resources & Tips Before Getting Started

Before you get started, reference the Quick Start Guide located on the Welcome page of the CDO Application web form to understand what information you need to complete the CDO application. To access the CDO Application Web Form User Guide, go to the Welcome Page of the CDO Application web form.

You can access additional training materials, FAQs, and videos that describe how to complete the CDO application on the CDO Program web page. This includes:

- CDO Learning Series – CDO Application – discusses the CDO application process.
- CDO Application Web Form FAQs – provides frequently asked questions about the CDO Application web form and the entire CDO application process including the CDO Organizational Maintenance web form.

For a step-by-step demonstration of the CDO Application web form, visit the CDO Application Demonstration video. To access a web page that provides information for potential CDOs about the CDO application process, visit the CDO Application information web page.
1.2. CDO Application Process Overview

Important: You must complete the application in one session (i.e., you will not be able to save and return to the application). Be sure to collect all of the needed application information prior to starting the application.

CMS will review the application and determine if the organization meets the requirements of a CDO when the submission of the application is complete.

If CMS approves your application, your organization must enter into an agreement with CMS, which outlines specific requirements about serving as a CDO, certifying certified application counselors (CACs), and performing oversight activities, including the ability to collect, store, and destroy Personally Identifiable Information (PII).

This document is a systematic guide to completing your organization’s CDO application.

WARNING

Submitting your CDO application does not guarantee approval of your organization as a CDO. Your organization cannot operate as a CDO until you receive official approval and a CDO ID from CMS.
2. Welcome Page

On the Welcome Page of the CDO Application web form, applicants should review the instructions before proceeding. Select the Continue button after reading and agreeing to the system access requirements message. The application then navigates to the Submitter Contact Information page.

Figure 1: CDO Application Welcome Page
3. **Submitter Contact Information**

The Submitter Contact Information page allows you to enter your contact information.

1. **Enter** the submitter’s contact information in the following text fields:
   
   - **First Name**
   - **Last Name**
   - **Email Address**
   - **Job Title**
   - **Phone Number**
   - **Phone Extension (if applicable)**

2. **Select** the **Continue** button. The web form will take you to the Existing Organization Information page.

![Submitter Contact Information](image)

**Figure 2: Submitter Contact Information Continue Button**
4. **Existing Organization Information**

The Existing Organization Information page allows you to check your organization’s status to determine whether an application already exists for your organization.

1. **Select** the **Yes** or **No** checkbox indicating whether your organization has a Federal Employee Identification Number (FEIN). If your organization has an FEIN, **enter** the nine-digit number in the field provided.

![Figure 3: Existing Organization Information Page FEIN](image)

2. **Select** the radio button next to **Yes** or **No**. If your organization was previously approved as a CDO. If yes, **enter** your organization’s eight-character CDO ID in the field provided. If no, **proceed to step 3**.

![Figure 4: Existing Organization Information Page Previously Approved as CDO](image)
3. **Select** the *Continue* button.

**Figure 5**: Existing Organization Information Page Continue Button

*Table 1* provides guidance about how to proceed to the appropriate section of this user guide if your organization does/does not have an existing application.

<table>
<thead>
<tr>
<th>If</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>The system found an existing application for your organization</td>
<td>Refer to <em>Section 4.1</em></td>
</tr>
<tr>
<td>The system did not find a match to the CDO ID entered</td>
<td>Refer to <em>Section 4.2</em></td>
</tr>
</tbody>
</table>
Existing Organization Information

4.1. Organization Found

If your organization previously submitted a CDO application that CMS approved or is reviewing, the web form will take you to the Organization Found page.

*Table 2* describes the actions you may take based on the status of your organization’s application.

<table>
<thead>
<tr>
<th>If</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your organization’s application is in progress and you want to request additional information</td>
<td><strong>Enter</strong> your request in the <em>Comments</em> field. Refer to <em>Figure 6</em>.  <strong>Select</strong> the <em>Submit Comments</em> button. The web form will take you to the Existing Organization Confirmation page. The CDO Program Office will contact you.</td>
</tr>
<tr>
<td>CMS approved your organization as a CDO and you want to change your organization’s information</td>
<td><strong>Select</strong> the <em>Exit</em> button. Refer to <em>Figure 67</em>. Use the Organizational Maintenance web form to <em>update</em> your organization’s information. You can access the Organizational Maintenance web form by <em>selecting</em> the link provided in your organization’s preliminary approval email.</td>
</tr>
<tr>
<td>You believe you received the Organization Found message in error</td>
<td><strong>Enter</strong> your explanation in the <em>Comments</em> field. Refer to <em>Figure 78</em>.  <strong>Select</strong> the <em>Submit Comments</em> button. Refer to <em>Figure 78</em>. The web form will take you to the Existing Organization Confirmation page. The CDO Program Office will contact you.</td>
</tr>
</tbody>
</table>

![WARNING]

If you are on the Organization Found page, you cannot proceed with a new application.
Existing Organization Information

Organization Found

Based on the information you entered, we determined that:

We received your organization’s application and are in progress. If you would like an application status, enter your request in the Comments section below.

Enter comments below if you believe you are receiving this message in error or to explain why you are submitting a new application.

**Comments**

I am requesting the status of our organization application

Figure 6: Organization Found Page Requesting Information Submit Comments Button

Organization Found

Based on the information you entered, we determined that:

We approved your organization as a CDO. If you would like to change your organization’s information, visit the CDO Maintenance web form link. Any individuals listed as a representative of your organization can make updates.

Enter comments below if you believe you are receiving this message in error or to explain why you are submitting a new application.

**Comments**

Enter any comments here.

Figure 7: Organization Found Page Approved Exit Button
4.2. No Existing Organization Found

If you entered your organization's FEIN or previous CDO ID but the system was unable to match it to a previously approved CDO, the web form will take you to the No Existing Organization Found page.

- If you want to verify the information you entered is correct, select the Back button to return to the Existing Organization Information page and review the information you submitted.
- If you believe you are receiving the message in error, enter your explanation in the Comments field and select the Submit Comments button. The web form will take you to the Existing Organization Confirmation page. The CDO Program Office will contact you.
- If you want to exit the web form, select the Exit button.
Existing Organization Information

No Existing Organization Found

We could not find a match with an existing organization using the information you provided. Use the Back button to verify the information you entered is correct.

If you believe you received this message in error, use the Comments section to explain why you believe your organization should be found in our records.

* Comments
  My organization was certified before. Our ID is AAAAAA

Figure 9: No Existing Organization Found Page Submit Comments Button

No Existing Organization Found

We could not find a match with an existing organization using the information you provided. Use the Back button to verify the information you entered is correct.

If you believe you received this message in error, use the Comments section to explain why you believe your organization should be found in our records.

* Comments

Figure 10: No Existing Organization Found Page Exit Button
5. Organization Contact Information

As a CDO, your organization must have two unique contacts on record with CMS: one (1) Organization Senior Official and one (1) CAC Project Director. There is an option to include a third contact, referred to as the Secondary Contact, but CMS does not require it. Please note individuals cannot fill multiple roles. *Table 3: Organization Contact Information Roles and Description* describes each role.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Senior Official</td>
<td>This individual must sign the CMS-CDO Agreement. Therefore, they must have the authority to both legally and financially bind the organization.</td>
</tr>
<tr>
<td>CAC Project Director</td>
<td>This individual is responsible for maintaining compliance with CDO requirements, certifying CAC staff, and volunteers, keeping CAC certification records, and updating organization information with CMS.</td>
</tr>
<tr>
<td>Secondary Contact</td>
<td>This individual may serve as an additional contact that supports the CAC Project Director and is knowledgeable about the program’s operations.</td>
</tr>
</tbody>
</table>

**NOTE**

If you are serving in any of these capacities as well as submitting the application, select the *Same as Submitter* checkbox and the contact information fields will populate with your information.
Organization Contact Information

The Organization Contact Information page allows you to enter contact information for each role.

1. **Enter** the Organization Senior Official contact information in the following text fields:
   - First Name
   - Last Name
   - Email Address
   - Job Title
   - Phone Number
   - Phone Extension (if applicable)

   ![Organization Senior Official Contact Information](image1)

   Figure 11: Organization Contact Information Page Organization Senior Official Contact Information

2. **Enter** the CAC Project Director contact information in the following text fields:
   - First Name
   - Last Name
   - Email Address
   - Job Title
   - Phone Number
   - Phone Extension (if applicable)

   ![CAC Project Director Contact Information](image2)

   Figure 12: Organization Contact Information Page CAC Project Director Contact Information
Organization Contact Information

3. If you are entering a secondary contact, select the **Secondary Contact Information** check box.

![Secondary Contact Information]

Figure 13: Organization Contact Information Page Secondary Contact Information Checkbox

4. **Enter** the secondary contact information in the following text fields:

   - **First Name**
   - **Last Name**
   - **Email Address**
   - **Job Title**
   - **Phone Number**
   - **Phone Extension** *(if applicable)*

![Secondary Contact Information Fields]

Figure 14: Organization Contact Information Page Secondary Contact Information Fields
5. **Select** the *Continue* button. The web form will take you to the Organization Headquarters Information page.

![Organisation Contact Information](image)

*Figure 15: Organization Contact Information Page Continue Button*
6. **Organization Headquarters Information**

The Organization Headquarters Information page allows you to enter information about your organization’s headquarters.

1. **Enter** your organization’s contact information in the following text fields:

   - **Organization Name**
   - **Organization Phone Number**
   - **Organization Email Address**
   - **Organization Website URL** *(if applicable)*

![Organization Headquarters Information](image)

**Figure 16: Organization Headquarters Information Page**

---

**Instructions**

Complete the fields below to provide information about the organization applying to become a CDO. The red asterisk (*) indicates required fields.

**Organization Information**

- **Organization Name:** Organization
- **Organization Phone Number:** (555) 555-5555
- **Organization Email Address:** org@org.org
- **Organization Website URL:**

---

*Figure 16: Organization Headquarters Information Page Organization Information*
Organization Headquarters Information

2. **Enter** the Organization’s headquarters address in the following fields:
   - Address Line 1
   - Address Line 2 (if applicable)
   - City
   - State *(use the picklist to select the state)*
   - Zip Code

   ![Figure 17: Organization Headquarters Page Organization Headquarters Address](image1)

3. **Select** the **Continue** button. The web form will take you to the Service Locations page.

   ![Figure 18: Organization Headquarters Information Page Continue Button](image2)
7. Service Locations

The Service Locations page allows you to select the state(s) and county or counties in which your organization provides enrollment assistance services. To access a color-coded map that provides the Marketplace type by state, select the *Map of Marketplaces* link.

**NOTE**

You can select the *Map of Marketplaces* link to open the States map, which defined each state Marketplace by Marketplace type (e.g., State-based Marketplace using the Federal Platform).

---

**Service Locations**

**Instructions**

Select the state in which your organization will provide enrollment assistance services. If you operate in more than one state, you must complete the service location selection activities for one state before adding another state. Include the state and county where your organization headquarters is located if your organization provides enrollment assistance services at that location.

For each state you choose, select the counties in which your organization provides enrollment assistance services by using the arrows above the *Available Counties* list to move the applicable counties to the *Selected Counties* list. Remove selected counties by using the arrows above the *Selected Counties* list.

You may filter the list of counties by entering the county name in the Filter field.

*Map of Marketplaces*

Reminder: CMS does not certify assister organizations in states operating State-based Marketplaces (SBMs) or State-based Marketplaces using the Federal Platform (SBMs-FP). The list below only includes states that operate Federally-facilitated Marketplaces (FFMs).

---

*Figure 19: Service Locations Page Map of Marketplaces Link*
Service Locations

![Map of Marketplaces](image)

**Figure 20: Map of Marketplaces**

1. **Select a State** in which your organization will provide enrollment assistance services from the drop-down menu. The **Available Counties** list will populate with the counties for the state(s) you chose.

![Service Locations Page State Selection](image)

**Figure 21: Service Locations Page State Selection**
Service Locations

2. **Select** the county or counties in which your organization will provide enrollment assistance services; **use** the arrows above the **Available Counties** list to move the applicable counties to the **Selected Counties** list. You may filter the list of counties by entering the county name in the **Filter** field.

3. **Select** the **Update Table** button. The Service Locations Table will include all service locations for your organization.
Service Locations

4. **Repeat steps 1 to 3** for each state in which your organization will provide enrollment assistance services.

5. **Select** the **Continue** button. The web form will take you to the Additional Organizational Details page.

---

**NOTE**

If your organization operates in more than one state, you must complete the service location selection steps for one state before adding another state. Include the state and county for your organization headquarters if your organization provides enrollment assistance services at that location.
8. Additional Organization Details

The Additional Organization Details page allows you to provide information about the type of work your organization performs.

1. **Select** the **Primary Organization Type** that applies to your organization. You can only select one.

![Additional Organization Details](image)

**Figure 25: Additional Organization Details Page Primary Organization Type**

---

**NOTE**

If you select Health Services, **select all** of the types of **Health Services** that apply to your organization. You must select at least one.
2. **Select** your *Organization Specialty*.

![Organizational Specialty Selection](image)

*Figure 26: Additional Organization Details Page Organization Specialty*

3. **Select** your *intended enrollment assistance type*.

![Intended Enrollment Assistance Type](image)

*Figure 27: Additional Organization Details Page Intended Enrollment Assistance Type*

4. **Select** the radio button next to *Yes* or *No* to answer questions about internal processes your organization currently has in place.

![Organization Current Status](image)

*Figure 28: Additional Organization Details Page Organization Current Status*
Additional Organization Details

NOTE

To become a CDO, your organization must have an established process for screening staff or volunteers who work for your organization (often completed during the hiring process) to ensure persons are appropriately vetted before serving as individual CACs.

- Specifically, CDOs must determine whether staff have any conflicts of interest that must be resolved.
- To become a CDO, your organization must have safeguards in place for protecting the privacy and security of PHI to ensure the appropriate handling of consumer’s personal information as you provide enrollment assistance.
- Your organization must be capable of providing services to help those you serve with health coverage decisions once you become a CDO.

5. **Select** the **Continue** button. The web form will take you to the CDO Summary page.

**Additional Organization Details**

**Instructions**

Select the options that apply to your organization.

- **What is your Primary Organization Type?**
  - Health Services (Select all that apply):
    - Hospital/Health System
    - Pharmacy
    - Federally Qualified Health Center/Community Health Center
    - Primary Care Association
    - Medical Practice
    - Social Services
    - Government Agency (city, state, local, federal, etc.)
    - Health Plan Issuer
    - Agent/Broker
    - Other

- **Organization Specialty (optional)** (Select all that apply):
  - Tribal
  - Faith-based
  - Behavioral/Mental Health
  - HIV/AIDS
  - Other

- **What is your intended enrollment assistance type?**
  - Year-round
  - Only Open Enrollment

- **Does your organization currently:**
  - Have processes in place to handle and protect Personally Identifiable Information (PII)?
    - Yes
    - No
  - Screen the staff and volunteers it will certify as application counselors?
    - Yes
    - No
  - Have processes in place to assist people with health coverage decisions?
    - Yes
    - No

*Figure 29: Additional Organization Details Page Continue Button*
The CDO Summary page provides all of the information you submitted in the CDO application. You can edit any of the sections by selecting the Edit link next to the section title.

1. Review and select Edit for any of the following sections if needed:
   - **Submitter Contact Information**
   - **Organization Contact Information**
   - **Organization Headquarters Information**
   - **Service Locations**
   - **Additional Organization Information Section**

   ![CDO Summary Review Page Contact Information](image)

   **Figure 30: CDO Summary Review Page Contact Information**
CDO Summary

1. Select the Submit button to submit the application. The web form will take you to the Confirmation page.

Note: Submitting a CDO application does not guarantee approval of your organization as a CDO. Your organization cannot operate as a CDO until you receive official approval from CMS.

Figure 32: CDO Summary Page Submit Button

2. Select the Submit button to submit the application. The web form will take you to the Confirmation page.

Note: Submitting a CDO application does not guarantee approval of your organization as a CDO. Your organization cannot operate as a CDO until you receive official approval from CMS.

Figure 33: CDO Summary Review Page Headquarters, Service Locations, Additional Organization Information

NOTE

If you do not select the Submit button, CMS will not receive your application.
10. Confirmation Page

The Confirmation page provides a summary of your session and allows you to print and save a PDF confirmation containing the information you submitted.

1. **Select** the **PDF** button to generate a PDF confirmation.

   ![Confirmation Page PDF Option](image)

   **Figure 33: Confirmation Page PDF Option**

2. **Select** the **Exit** button to exit the application.
Confirmation Page

Figure 34: Confirmation Page Exit Application Button

**WARNING**

You should print a copy of the PDF for your records, as you will not be able to return to this page.
11. Next Steps

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, the application process is not complete.

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

Receiving a Preliminary Approval email does NOT mean CMS approved your organization as a CDO. Your organization is not an approved 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 your effective date.

The CDO Organizational Maintenance web form, referred to as the maintenance web form, is the platform that CDOs use to maintain information about your organization with the CMS.

You will use the maintenance web form to:

- Submit or Renew CMS-CDO Agreements:
  - New Applicants complete the initial application process by uploading a signed CMS-CDO agreement, after submitting your initial application using the CDO Application web form and receiving a Preliminary Approval email.
  - Per Section IV.1 (Effective Date and Term) of the CMS-CDO agreement, existing CDOs complete a renewal application every two (2) years by reviewing existing organization information and uploading a renewal agreement.
- Maintain administrative data on CDO headquarter location, service locations, designated contacts information, etc.
- Submit and maintain a roster of CACs.
- Monitor CAC Annual Certification Data from the Marketplace Learning Management System (MLMS).
Next Steps

New applicants can only access the maintenance web form after receiving a preliminary approval email from CMS, upon approval of the CDO application submitted through the CDO Application web form. Moving forward, you will access the maintenance web form to keep your information up to date with CMS.

- Existing CDOs should access the maintenance web form directly to keep your information up to date with CMS.
- For all CDOs, your Organization Senior Official, CAC Project Director, or Secondary Contact (if applicable) can access the maintenance web form. These individuals must use the email address entered on the CDO application when creating an access code for the maintenance web form.

You can access additional training materials, FAQs, and videos that describe how to complete the CDO application on the CDO Program web page. This includes:

- CDO Program FAQs – provides frequently asked questions about the entire CAC application process and the CDO Program.
- CDO Organizational Maintenance Web Form FAQs – provides frequently asked questions about the maintenance web form and CAC application process including the CAC roster.
- CDO Organizational Maintenance Web Form Demonstration videos – Overview and Access Code – provides an overview of the maintenance web form and a step-by-step demonstration of how to setup an access code and how to submit a CMS-CDO agreement the first time using the maintenance web form.
- CDO Organizational Maintenance Web Form Demonstration videos – CAC Roster – provide a step-by-step demonstration of how to add and update a CAC roster using the maintenance web form.

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

For a video that discusses the process for adding, updating, and decertify your CACs, visit CDO Learning Series – CAC Roster.

For step-by-step instructions about using the maintenance web form including how to log in, how to add a CMS-CDO agreement, how to add and update a CAC roster, and how to maintain CDO information and renew a CDO agreement, visit CDO Organizational Maintenance Web Form User Guide.

To access a web page that provides information for potential CDOs about the CDO application process, visit CDO Application information web page.

To access a web page that provides information for potential and active CDOs about the program including links to all of the program training materials, visit CDO Program information web page.

To access a web page that provides information for active CDOs about how to upload and maintain a CAC roster, maintain a CDO record, and renew a CDO agreement, visit Information for active CDOs web page.