



# Certified Application Counselor Designated Organization Application



*July 2019*

*The information provided in this document is intended only to be a general informal summary of technical legal standards. It is not intended to take the place of the statutes, regulations, or formal policy guidance that it is based upon. This document summarizes current policy and operations as of the date it was presented. We encourage readers to refer to the applicable statutes, regulations, and other interpretive materials for complete and current information. This communication was printed, published, or produced and disseminated at U.S. taxpayer expense.*

# Session Agenda

1. What is a certified application counselor designated organization (CDO)?
2. Before beginning the application process
3. CDO Application demonstration
4. Next steps

# Intended Audience

- Organizations interested in becoming a CDO
- Application submitters
- Organization Senior Officials
- CAC Project Directors
- Secondary Contacts

# Becoming a CDO



- ✓ *What is a CDO?*
- ✓ *What are a CDO's Responsibilities and How Does CMS Support CDOs?*
- ✓ *New process for becoming a CDO*

# What is a CDO?

- A certified application counselor designated organization (CDO) is an entity that meets specific eligibility criteria and has been formally designated by CMS to serve as a CDO.
- Participation as a CDO is voluntary. CMS does not provide funding for CDOs.

*For information about the CAC Program, visit <https://marketplace.cms.gov/technical-assistance-resources/assister-programs/cac.html>.*

# What are a CDO's Responsibilities and How Does CMS Support CDOs?

- Certifies staff or volunteers to act as certified application counselors (CACs) to provide information to consumers and to help facilitate consumer enrollment in QHPs and insurance affordability programs (45 CFR 155.225).
- Per 45 CFR 155.225(d)(7), a CDO may certify staff members and volunteers to be CACs only if the staff member or volunteers recertify on at least an annual basis.
- CDOs may publish their CAC listings on Find Local Help so consumers can locate them when searching for enrollment assistance on Marketplace.gov.
- CMS provides CDOs and CACs with important assister information and updates via webinars, newsletters, and emails.
- CDOs will receive general support via the CAC Questions inbox ([cacquestions@cms.hhs.gov](mailto:cacquestions@cms.hhs.gov)) as well as technical support for consumer assistance via the Marketplace Call Center.

*For more information about CAC responsibilities, visit [https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=ced9cdabo3dda4243dbc9e702a06c3ab&r=PART&n=pt45.1.155#se45.1.155\\_1225](https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=ced9cdabo3dda4243dbc9e702a06c3ab&r=PART&n=pt45.1.155#se45.1.155_1225).*

*For more information about 45 CFR §155.225, visit [https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=ced9cdabo3dda4243dbc9e702a06c3ab&r=PART&n=pt45.1.155#se45.1.155\\_1225](https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=ced9cdabo3dda4243dbc9e702a06c3ab&r=PART&n=pt45.1.155#se45.1.155_1225).*

*Please add [cacquestions@cms.hhs.gov](mailto:cacquestions@cms.hhs.gov) to your trusted emails to ensure you receive all CMS notifications.*

# What Do I Need to Have in Place to Become a CDO?

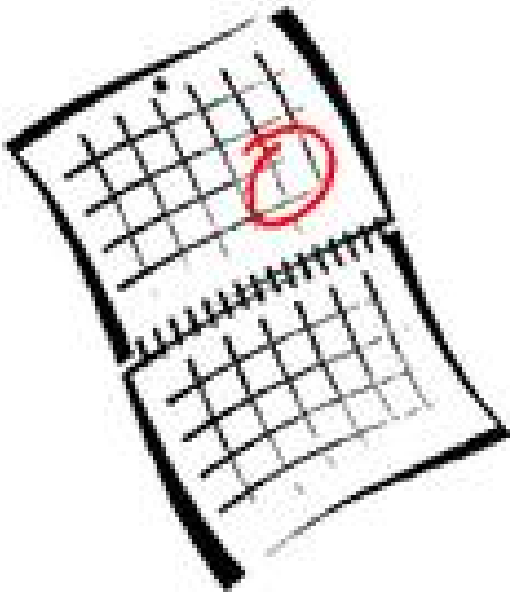
- Successful submission of a CDO application and execution of CMS-CDO agreement (45 CFR 155.225(b)(2))
- Processes to certify individuals to serve as CACs and written agreement with CACs (45 CFR 155.225(b)(1))
- Processes to handle and protect personally identifiable information (PII). (45 CFR 155.225(d)(3))
- Processes in place to ensure that CACs do not have any prohibited conflicts of interest (45 CFR 155.225(d)(2))



**Consistent with Federal Regulations at 45 CFR 155.225(g)(2), individuals and entities who receive direct or indirect consideration from a health insurance issuer or stop loss issuer in connection with the enrollment of an individual into a qualified health plan (QHP) or non-QHP are ineligible to be CDOs or CACs.**

*For more information about CDO responsibilities, visit <https://www.cms.gov/CCIIO/Resources/Regulations-and-Guidance/Downloads/CAC-guidance-7-12-2013.pdf>.*

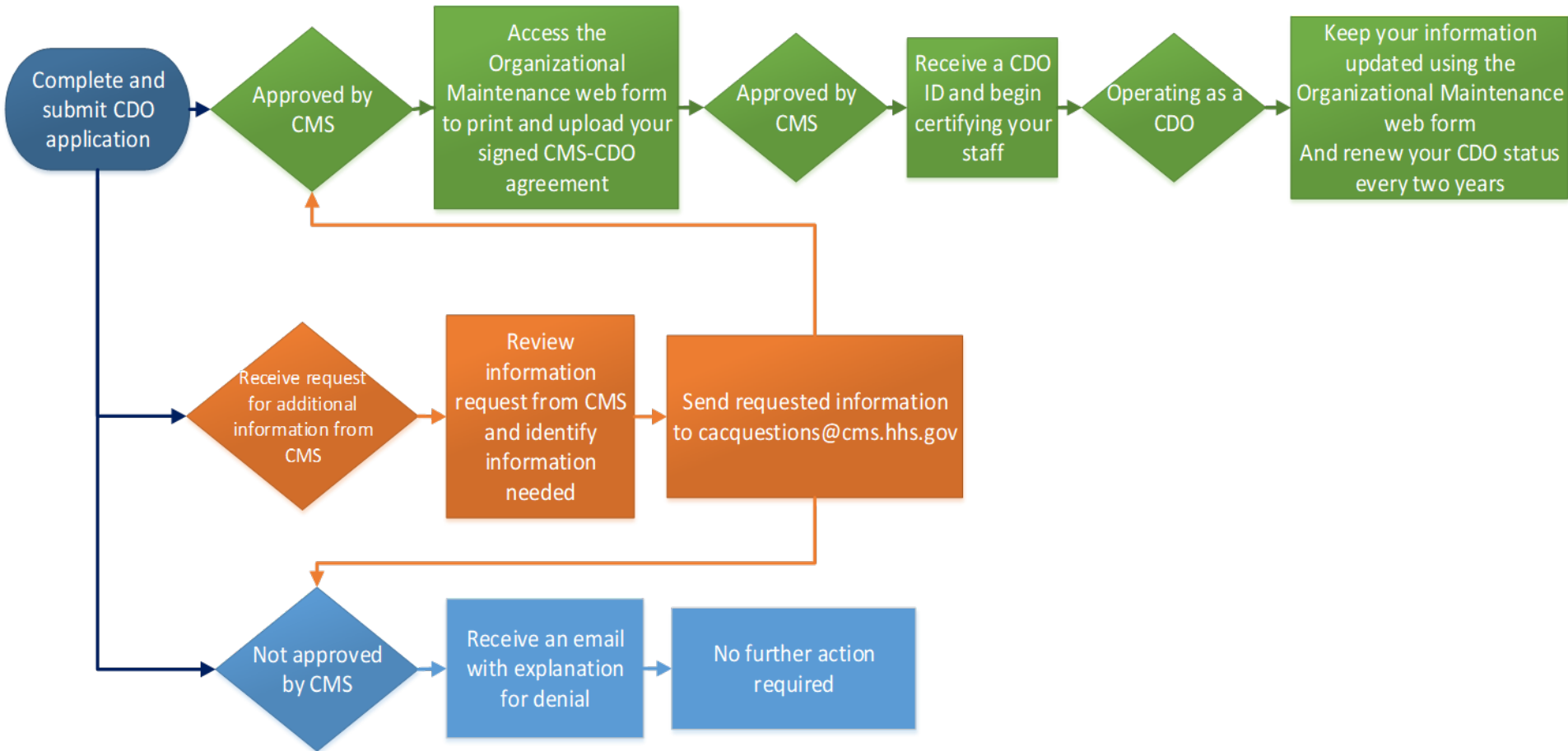
# CDO Application Open Season



- Organizations can apply to become CDOs beginning June 12th through September 16<sup>th</sup>.
- CDO designation is valid for two years.
- CDOs who completed the application process last year and received a new CDO ID do NOT need to apply.
- Current CDOs who applied during last year's refresh process will need to re-confirm participation in 2020.



# New Process for Becoming a CDO



Please add [cacquestions@cms.hhs.gov](mailto:cacquestions@cms.hhs.gov) to your trusted emails to ensure you receive all CMS notifications.

# Before Starting the Application



- ✓ *Introduction to the CDO application*
- ✓ *Items needed to complete the application*

# Items Needed to Complete the Application

- Organization Name
- Federal Employee Identification Number (FEIN) (*if applicable*)
- Previous CDO ID (*if applicable*)
- Organization Senior Official contact information
- CAC Project Director contact information
- Secondary Contact's information (*if applicable*)
- Phone number
- Email address
- Website URL (*if applicable*)
- Headquarters' address
- List of states and counties where the organization will operate
- Primary organization type
- Organization specialty (*if applicable*)
- Intended enrollment assistance type



# Introduction to the Application

There are five pages in the CDO application.

- Submitter Contact Information
- Organization Contact Information
- Organization Headquarters Information
- Service Locations
- Additional Organization Details

## Next Steps

- ✓ *What to expect after submitting your application*



# What to Expect after Submitting the Application

If	Then
CMS approves the application	Access the Organizational Maintenance web form to print and upload your signed CMS-CDO agreement
CMS requests additional information	Send requested information to <a href="mailto:cacquestions@cms.hhs.gov">cacquestions@cms.hhs.gov</a>
CMS does not approve the application	No further action required



**Thank you!**

To apply, please go to:

<https://mats.secure.force.com/CDOApplication/>