

CAC Roster – Video Transcript



This document is a transcript for the CDO Learning Series.

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Other Modules

Welcome to the CAC Roster module. In this module, we will discuss the process for uploading and maintaining your certified application counselor (CAC) roster.

As part of this learning series, there are additional modules that highlight the following CDO Program topics:

CDO Renewal: learn more about the process for renewing your CDO certification with CMS.

CDO Application: learn more about the CDO Application process.

CDO Data Management: learn more about how to maintain your information with CMS during your two-year certification period.

Introduction

As a CDO with the Centers for Medicare and Medicaid Services (CMS), your organization is responsible for managing your staff of CACs throughout your two-year certification period.

CAC Tasks

This includes assigning CAC IDs, ensuring your CACs complete training on an annual basis, and maintaining your list of CACs.

New Resource

To help with this, CMS developed functionality within the CDO Organizational Maintenance web form for CDOs to use to populate their roster of CACs, track their training completion dates, and keep their roster up-to-date.

New Resource 2

Beginning in plan year 2021 and beyond, your organization can use the CDO Organizational Maintenance web form to add and maintain your roster of CACs.

Moving forward, maintaining your CAC IDs using the web form is critical for your CACs to access training.

CDO Organizational Maintenance web form homepage:

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

CAC Roster Process 1

Any of your organization's three unique contacts can access the web form to add and maintain your CAC roster.

CAC Roster Process 2

The web form provides your organization's contacts with two ways to add and maintain your CAC roster, manually or using a CSV file.

CAC Roster Process 3

After you add your roster of CACs, the Marketplace Learning Management System (MLMS) will update your roster at the end of every day with the current status of your CAC's training completion dates.

CAC Roster Process 4

This allows your organization's contacts the ability to monitor CAC training completion and ensure all CACs meet the annual certification training requirement.

Preparing

To prepare to upload your roster of CACs, your organization should make sure your contacts can access the web form, collect your list of CACs, and ensure every CAC has a unique ID number.

For help assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>.

Maintaining

If your CAC roster changes, your organization's contacts must access the web form and decertify CACs who leave your organization and add any new CACs who join your team.

Document

To clarify, the first time you upload your roster of CACs, you should document your existing CAC IDs and make sure the root ID of these CAC IDs uses your newest CDO ID issued to you by CMS. You will have the option to copy and paste your existing list into a template or add your CACs one at a time.

Functionality

Start using this functionality today and make sure to add your roster of CACs before training goes live each year and maintain your list regularly to ensure accuracy.

Contact Us

If you have any questions about this process, please email the CAC Program Office.

- cacquestions@cms.hhs.gov