

# CDO Contact Changes Job Aid

## Overview

Certified Application Counselor Designated Organizations (CDO) may use the Organizational Maintenance web form to [add, update or replace](#) any of its three (3) unique contacts with the Centers for Medicare & Medicaid Services (CMS). This job aid will walk you through how to:

1. **Move an Existing Contact to a New CDO Program Role**
2. **Replace an Existing Contact with a New Contact**
3. **Reassign an Existing Contact a new CDO Program Role**

## Background

During their two (2)-year certification period, CDOs **must** update their CDO record with CMS if any changes occur to the following:

- Organization Name
- Address
- Any of the CDO's three (3) Unique Contacts
  - Includes changes to email address, phone number or First or Last Name
- Service Locations
- Enrollment Assistance Type,
- Specialty Areas, and
- Certified Application Counselor (CAC) roster.

CDOs can use the Organizational Maintenance web form to add, update or replace any of its three unique contacts. Ensure your CDO doesn't miss important CMS-CDO Program Office information by timely updating your CDO record with changes to the email address, phone number or First or Last name of your three unique contacts.

## Additional Help, Resources and Troubleshooting

For more information on how to [maintain your record with CMS](#), demos on [working in the web form](#), [managing CDO data](#), along with [FAQs](#) and other resources, visit the [Information for Active CDOs](#) page on [Marketplace.cms.gov](#).

If you're unsure who your CDO's contacts are, OR none of the initial 3 unique contacts remain with your organization, follow the instructions below. Once CMS receives this information, CMS will update the CDO's contact list and will send the new contacts a Welcome Packet email with the CDO ID, the counter signature page of the CMS-CDO Agreement, and critical information about the CDO Program.

- If you do not know who your organization's 3 unique contacts are, please email [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov) and request this information.
- If none of your initial 3 unique contacts remain with your organization, please email us at [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov) and provide the following information for each of your 3 new unique contacts:
  - Full Name
  - Title that person is assuming within your CDO – Organization Senior Official, CAC Project Director, or Secondary Contact (not required)
  - Job title
  - Phone number
  - Email address

## Edit an Existing Contact

One of your organization's 3 unique contacts must use the CDO Organizational Maintenance web form to update your organization information.

To edit an existing contact:

1. **Log in to** the [CDO Organizational Maintenance Web Form](#).
2. In the Contact Information table on the CDO Summary page, **select** the **Edit** link beneath the title of the role you want to update.
3. On the Edit Contact Information page, make the necessary edits to the contact's information.
4. When you complete your edits, **select** the **Save and Return** button.
5. On the CDO Summary page, **select** the **Submit** button.

**Your changes will not go into effect until you 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.

## Replace an Existing Contact with a New Contact

Your organization contacts must use the CDO Organizational Maintenance web form to update your organization information. Remember that your organization must have two unique contacts

– an Organization Senior Official and a CAC Project Director – on file. You may designate a third contact, referred to as the Secondary Contact, but this is not required.

- The Organization Senior Official must be someone who can bind the organization legally and financially.
- The CAC Project Director is responsible for maintaining compliance with CDO requirements, certifying CAC staff and volunteers, keeping CAC certification records, and updating organization information with CMS.
- The Secondary Contact may serve as an additional contact person who supports your CAC Project Director and is knowledgeable about your program's operations.

To replace any of your organization's existing contacts with someone new:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the Contact Information table on the CDO Summary page, **select** the **Replace** link beneath the title of the role you want to update.
3. On the Replace Contact Information page, **enter** the contact's information into the following fields: **First Name, Last Name, Email Address, Job Title, and Phone Number**. The **Phone Extension** field is optional.
4. When you complete your edits, **select** the **Save and Return** button.

If you change your Organization Senior Official information, the CDO Organizational Maintenance web form will prompt you to generate, sign, and upload a new CMS-CDO Agreement.

To generate your agreement:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the Agreement PDF table on the CDO Summary page, **select** the **Replace** link.
3. On the Attestation and Agreement Upload page, **select** the **Print PDF Agreement** button.
4. Review pages 1 and 12 of the agreement and confirm your organization's information. If any information is incorrect, return to the [CDO Organizational Maintenance Web Form](#) and edit your organization information. Then, repeat the steps above to generate another agreement.
5. Obtain your Organization Senior Official's signature and date the signature page of the agreement.



To upload your agreement:

1. In the Agreement PDF table on the CDO Summary page, **select** the **Replace** 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 place you saved a PDF version of your signed agreement on your computer, 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 your file. If you do not successfully upload your agreement, you will receive a warning message.
6. **Select** the **Save and Return** button.
7. Back on the CDO Summary page, **select** the **Submit** button.

**Your changes will not go into effect until you 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.

## **Move an Existing Contact to a New CDO Program Role**

The CDO Organizational Maintenance web form will not allow a contact to fill more than one CDO Program role: Organization Senior Official, CAC Project Director, or Secondary Contact.

The CDO Program only requires CDOs to have an Organization Senior Official and a CAC Project Director. You may designate a third contact, referred to as the Secondary Contact, but it is not required.

If you need to move an existing contact to a new CDO Program role, you need to replace them with a new contact first and submit your changes.

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the Contact Information table on the CDO Summary page, **select** the **Replace** link beneath the CDO Program role the individual will fill.
3. On the Replace Contact Information page, **enter** their information into the following fields: **First Name, Last Name, Email Address, Job Title, and Phone Number**. The **Phone Extension** field is optional.
4. When you complete your edits, **select** the **Save and Return** button.
5. On the CDO Summary page, **select** the **Submit** button.

**Your changes will not go into effect until you select the Submit button.**

After you replace the individual with a new contact and submit your changes, the web form will deactivate their previous access code and they will not be able to log in until someone adds them in their new CDO Program role.

To move the contact to their new CDO Program role, one of the remaining contacts can access the web form and make the additional contact changes needed by following the steps below:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the Contact Information table on the CDO Summary page, **select** the **Replace** link beneath the CDO Program role the individual will fill.
3. On the Replace Contact Information page, **enter** their information into the following fields: **First Name, Last Name, Email Address, Job Title, and Phone Number**. The **Phone Extension** field is optional.
4. When you complete your edits, **select** the **Save and Return** button.
5. On the CDO Summary page, **select** the **Submit** button.

**Your changes will not go into effect until you select the Submit button.**

After you submit your changes, the contact can create a new access code associated with their new role.

To create an access code:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. **Select** the **Create Access Code** button.
3. On the Create Access Code page, enter their email address.
4. **Enter** your information in the **Access Code** field and **re-enter** it in the **Confirm Access Code** field.
5. **Select** two security questions and **provide** responses.
6. **Select** the **Continue** button.
7. On the Access Code Confirmation page, **select** the **Continue** button.
8. Back on the Welcome page, **enter** your information (i.e., your email address) in the **Login ID** field and your information in the **Access Code** field.
9. Select the **Log In** button.

If you change your Organization Senior Official information, the CDO Organizational Maintenance web form will prompt you to generate, sign, and upload a new CMS-CDO Agreement.

To generate your agreement:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the Agreement PDF table on the CDO Summary page, **select** the **Replace** link.
3. On the Attestation and Agreement Upload page, **select** the **Print PDF Agreement** button.
4. Review pages 1 and 12 of the agreement and confirm your organization's information. If any information is incorrect, return to the [CDO Organizational Maintenance Web Form](#) and edit your organization information. Then, repeat the steps above to generate another agreement.
5. **Obtain** your **Organization Senior Official's signature and date** the signature page of the agreement.

To upload your agreement:

1. In the Agreement PDF table on the CDO Summary page, **select** the **Replace** 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 place you saved a PDF version of your signed agreement on your computer, 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 your file. If you do not successfully upload your agreement, you will receive a warning message.
6. **Select** the **Save and Return** button.
7. Back on the CDO Summary page, **select** the **Submit** button.

**Your changes will not go into effect until you select the Submit button.**

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

## Additional Information

For a step-by-step demonstration of how to maintain your CDO record with CMS, access the [CDO Organizational Maintenance Web Form Demonstration – CDO Data Management video](#).

For step-by-step instructions about using the Organizational Maintenance web form, including how to add and update a CAC roster, review the [CDO Organizational Maintenance Web Form User Guide](#).

For a step-by-step demonstration of how to create an access code and upload a CMS-CDO agreement for the first time, access the [CDO Organizational Maintenance Web Form Demonstration – Overview and Access Code video](#).

For a document that provides frequently asked questions (FAQs) about the Organizational Maintenance web form and CAC application process including the CAC roster, access the [CDO Organizational Maintenance Web Form FAQs](#).

Email any questions to [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov). Be sure to include your organization's name and CDO ID in the body of your email.

