

CDO Onboarding and Data Management – Video Transcript



This document is a transcript for the CDO Learning Series.

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Other Modules

Welcome to the CDO Onboarding and Data Management module. In this module, we will discuss resources available to you as a CDO and how to maintain your information with CMS during your two year certification period.

As part of the CDO 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.

CAC Roster: learn more about the process for uploading your CAC Roster.

CDO Application: learn more about the CDO Application process.

Welcome Packet

As an approved CDO, CMS sent you a Welcome Packet, via email, containing your CDO ID, information about the CAC Program, and links to CDO resources.

The Welcome Packet website also contains several helpful documents to which you can refer during your certification period.

Record Keeping

We recommend you keep a copy in your records of:

- Your CDO ID provided in your Welcome Packet
- Your organization's contact information, including email addresses for each contact submitted with your CDO application
- A hard copy of your signed CMS CDO agreement, including the counter-signature page from CMS, which CMS sent as part of your Welcome Packet.

If you do not have this information, you can contact the CAC Questions inbox at cacquestions@cms.hhs.gov.

Find Local Help

Find Local Help is an online directory that connects consumers with assister organizations to help with enrollment in the Marketplace. Thirty days following receipt of your Welcome Packet from CMS, you may list your organization on the online Find Local Help directory. You can post and maintain your organization contact information on the online Find Local Help directory at:

<https://localhelp.healthcare.gov/update-organization-information/#/>.

Certification Period

CMS certifies CDOs for two years. To begin, your organization needs to certify your CAC staff and upload a CAC roster. Then, during the two year certification period, your organization must keep your CDO information and CAC roster current.

Certifying Staff

To certify your CACs, your organization must issue each CAC a unique ID, ensure their completion of the annual training on the Marketplace Learning Management System (MLMS), and provide them with a CDO CAC model agreement.

Remember that your state and your organization may have additional requirements, as well.

CAC Roster

To upload and maintain your CAC roster, your organization's contacts will access the CDO Organizational Maintenance web form, referred to as the maintenance web form, and add, decertify, or edit information pertaining to your CACs.

Maintaining a roster of your active CACs is necessary for your CACs to access annual certification training on the MLMS.

CDO Organizational Maintenance Web Form

To keep your information current, your organization's contacts will access the maintenance web form, and update your information as needed.

Data updates include changes to your organization's name, address, list of contacts, service locations, enrollment assistance type (open enrollment only or year-round) and specialty areas.

CDO Organizational Maintenance Web Form 2

If your contacts make any updates to the Organization Name and/or the Organization Senior Official contact information, or if they add or remove service locations, or update the organization's physical address, the maintenance web form will prompt them to upload a new signed CMS CDO agreement.

Renewing Your CDO Status with CMS

After two years, your organization's contacts must renew your CDO status with CMS by uploading a new signed and dated CMS CDO agreement. You will not need to complete the application again.

Get Started Today!

Thank you for being our partner in making affordable health care coverage a reality for people in your community—we look forward to working together! There are many resources to help you on your way!

Welcome Packet - <https://marketplace.cms.gov/technical-assistance-resources/assister-programs/certified-application-counselor-welcome-packet.html>

Training for assisters - <https://marketplace.cms.gov/technical-assistance-resources/training-materials/training.html>

CMS Outreach and Education Resources - <https://marketplace.cms.gov/outreach-and-education/outreach-and-education.html>

Find Local Help - <https://localhelp.healthcare.gov/>

Contact Us

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

- cacquestions@cms.hhs.gov