

CDO Organizational Maintenance Web Form Troubleshooting Frequently Asked Questions (FAQs)

What is in This Document

This document includes an [Introduction to the CDO Organizational Maintenance Web Form](#), along with frequently asked questions about [Logging In](#), [CMS-CDO Agreements](#), [CDO Renewals](#), [CAC Roster](#), and [Other Administrative Data](#) guidance.

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Introduction to the CDO Organizational Maintenance Web Form

The CDO Organizational Maintenance web form, referred to as the maintenance web form, is the platform that CDOs in the FFMs use to maintain information about your organization with the Centers for Medicare & Medicaid Services (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 using the maintenance web form. New applicants can only access the CDO Organizational Maintenance web form after submitting an initial application using the CDO Application web form and receiving a Preliminary Approval email from CMS.
 - Existing CDOs complete a renewal application every two (2) years by reviewing existing organization information and uploading a newly signed and dated renewal agreement, per Section IV.1 (Effective Date and Term) of the CMS-CDO agreement.
- Maintain administrative data on CDO headquarter location, service locations, designated contacts information, etc.
- Submit and maintain a roster of certified application counselors (CACs).
- Monitor CAC Annual Certification Data from the Marketplace Learning Management System (MLMS)

Once the initial application process is complete and final approval from CMS is received, new applicants will access the maintenance web form to keep your information up to date with CMS.

Existing CDOs should always 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.

This document provides responses to FAQs on troubleshooting technical issues about the maintenance web form.

You can access additional training materials, FAQs, and videos on the [CDO Program web page](#). This includes:

- CDO Organizational Maintenance Web Form Demonstration videos – provide step-by-step demonstrations for setting up an access code and submitting a CMS-CDO agreement the first time, updating CDO information, renewing an organization's CDO status, and adding and updating a CAC roster using the maintenance web form.

For a video that discusses the CDO application process, visit the [CDO Learning Series – CDO Application video](#).

For a video that discusses the process for renewing your CDO certification with CMS, visit the [CDO Learning Series – CDO Renewal video](#).

For a video that discusses the process for CDOs to add, update, and decertify your CACs for the CAC Roster, visit the [CDO Learning Series – CAC Roster video](#).

For step-by-step instructions about adding and updating a CAC roster, review the [CAC Roster Job Aid](#).

For step-by-step instructions about using the maintenance web form including how to add and update a CAC roster, review the [CDO Organizational Maintenance Web Form User Guide](#). For more resources about the CDO application process, access the [certified application counselor designated organization \(CDO\) application information web page](#).



Logging In

Why am I unable to log in to the maintenance web form?

When logging in to the CDO Organizational Maintenance web form, you need to:

- Make sure your organization record lists you as one of your organization's contacts: Organization Senior Official, CAC Project Director, or Secondary Contact.
- Use the email address entered on the application.
- Create an access code the first time you log in.

If you continue to experience technical issues, email us at CACQuestions@cms.hhs.gov and include the list of steps you are taking prior to receiving an error message, along with an attached screenshot.

Note: New CDO applicants can only access the maintenance web form only after receiving a Preliminary Approval email from CMS upon approval of your CDO application you 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.

I forgot my access code. What do I do?

If you forget your access code, you can reset your access code using the instructions below.

On the Forgot Access Code page:

1. Enter your organization's Organization Senior Official, CAC Project Director, or Secondary Contact email address.
2. Select the Send PIN button. The web form will send a PIN to the Organization Senior Official, CAC Project Director, or Secondary Contact email address on record. The PIN will expire in 24 hours.

Once you receive a six-digit PIN:

1. Return to the maintenance web form.
2. Select the Forgot Access Code link on the Welcome page.
3. Enter your PIN into the PIN field.
4. Select the Continue button to reset your access code.

On the Reset Access Code page:

1. Enter your new access code.
2. Confirm your new access code by entering it again.
3. Select a security question(s) and enter the corresponding response(s).
4. Select the Continue button.
5. On the Access Code Reset Confirmation page, select Continue to proceed to the login page.

My security question responses are not working. What do I do?

Please email CACQuestions@cms.hhs.gov to reset your security questions.

What should we do if we experience technical issues with the CDO Application web form or CDO Organizational Maintenance web form?

If you encounter technical issues when accessing the CDO Application web form or CDO Organizational Maintenance web form, email us at CACQuestions@cms.hhs.gov and include the list of steps you are taking prior to receiving the error message, along with an attached screenshot.

CMS-CDO Agreements

Can anyone from my organization sign the CMS-CDO Agreement?

No, only an official authorized to represent and bind your organization for purposes of the CMS-CDO Agreement may sign the CMS-CDO Agreement.

If the responsible entity changes after CMS approves your organization as a CDO, your organization must update its information on record with CMS and submit a new signed CMS-CDO Agreement using the CDO Organizational Maintenance web form.

How do I submit the signed CMS-CDO Agreement?

Your organization's unique contacts may access the CDO Organizational Maintenance web form to upload a signed CMS-CDO Agreement.

To generate an agreement using the CDO Organizational Maintenance web form:

1. Log in to the CDO Organizational Maintenance web form.
2. In the Agreement PDF table, select the Add or Replace link.
3. On the Attestation and Agreement Upload page, select the Print PDF Agreement button.
4. Print the agreement and obtain the Organization Senior Official's signature.

To upload an agreement:

1. In the Agreement PDF table on the CDO Summary page, select the Add 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 location of the saved PDF version of the signed agreement, 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 the file. The web form will display a warning message if the agreement was not uploaded.
6. Select the Save and Return button.

7. Back on the CDO Summary page, 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.

I submitted the signed CMS-CDO Agreement and it keeps getting rejected, why?

CMS will not accept your signed CMS-CDO Agreement if you did not submit pages 1 through 12 of the agreement, or if any of the following information is missing or does not match your organization's approved corresponding CDO application:

- Service location(s)
- Signature of Organization Senior Official
- Organization Senior Official Name and Title
- Date of signature
- Organization Name
- Corresponding Application ID
- Organization address

Do I need to upload the entire CMS-CDO Agreement, or just the signature page?

When you submit your CMS-CDO Agreement, make sure to include pages 1 through 12, which includes the signature page, for review.

What is the difference between the CDO Application web form and CDO Organizational Maintenance web form?

The CDO Application web form is the platform organizations use to submit CDO applications to CMS. Any organization operating in an FFM state seeking to provide CAC enrollment assistance to consumers must apply to become a CDO, and enter into an agreement with CMS using the CDO Application web form. The CDO Application web form link is only accessible during CMS's Open Season, which takes place each summer.

Organizations that receive CMS approval on their CDO application will gain access to the CDO Organizational Maintenance web form, which is the platform organizations use to:

- Submit an initial signed CMS-CDO Agreement
- Keep their CDO record up to date
- Add and maintain their roster of CACs
- Submit a new signed and dated CMS-CDO Agreement to renew their CDO status every two (2) years

How do I get access to the CDO Organizational Maintenance web form?

If CMS approves your application, we will send a Preliminary Approval email to your contacts on file. The Preliminary Approval email contains a link to the CDO Organizational Maintenance web form where you must upload your signed CMS-CDO agreement.

How long does it take CMS to review my signed CMS-CDO Agreement?

CMS's CDO Program Office will review your CMS-CDO Agreement within five (5) business days of receipt. We review agreements in the order in which they are received.

After CMS completes our review, we will send a Welcome Packet email that includes your certified application counselor designated organization (CDO) ID, the counter signature page of the CMS-CDO Agreement with the effective date of the agreement and two-year CDO certification period, and important guidance for operating as a CDO.

What happens if I do not submit the signed CMS-CDO Agreement?

New applicants that do not submit a signed CMS-CDO Agreement after receiving Preliminary Approval from CMS, will not become a CDO. Only organizations that submit their signed CMS-CDO Agreement during the CDO Application Open Season and receive a CDO ID from CMS can certify staff or volunteers as CACs. Submitting a CDO application is only the first step of the application process. To complete the process, one of your organization's contacts must submit the signed CMS-CDO Agreement for CMS review and your organization must receive final approval from CMS.

Existing CDOs must renew before your agreement and CDO certification expires, or you will become inactive. Your organization will need to re-apply since your CDO ID will no longer be valid. Per the CMS-CDO Agreement, you must also inform your certified application counselors (CACs) to stop providing enrollment assistance as CACs.

What happens after I submit the signed CMS-CDO Agreement?

CMS's CDO Program Office will review your CMS-CDO Agreement within five (5) business days of receipt. If your CMS-CDO Agreement requires revision and/or resubmission, CMS will send an email to your contacts on file containing the information needed and instructions for resubmitting the agreement.

If CMS approves your CMS-CDO Agreement, we will send a Welcome Packet email that includes your CDO ID, counter signature page with the effective date of the agreement and two-year CDO certification period, and important guidance for operating as a CDO.

My CDO is not due for renewal, but the system is requiring me to upload a new CMS-CDO Agreement, why?

You are receiving a message to upload a new CMS-CDO Agreement because one of your contacts updated your organization's information and these changes require a new signed and dated CMS-CDO Agreement.

Updating the following information triggers the need for an updated CMS-CDO Agreement:

- Organization name change

- Changes to the Organization Senior Official's contact information
- Changes to your headquarters' address
- Adding or removing service locations

What is the file size limitation for the signed CMS-CDO Agreement?

The CDO Organizational Maintenance web form will not accept attachments that exceed 10 MB.

The Centers for Medicare & Medicaid Services (CMS) only requires that you submit pages 1 through 12 of the agreement. If you include the Appendix, your PDF may exceed the 10 MB limit.

If you continue to receive an error message, please try uploading only pages 1 through 12.

If you continue to receive an error message, email us at to CACQuestions@cms.hhs.gov. Please include the list of steps you are taking prior to receiving the error message and attach a screenshot.

I submitted an agreement, but CMS requested a revision or resubmission; how do I proceed?

After CMS reviews your CMS-CDO Agreement and determines that we need you to resubmit the agreement or revise the agreement, we will send your contacts an email with details regarding what information you need to edit or resubmit.

Edits or resubmissions may include:

- Submitting pages 1 through 12 of your CMS-CDO Agreement. If we do not receive pages 1 through 12, we will not accept your agreement.
- Having the Organization Senior Official sign page 12 of the agreement. If the signature on page 12 is missing or if the signature does not match the Organization Senior Official listed on your application, we will not accept your agreement.

Before re-submitting your agreement, please review pages 1 and 12 of the agreement and confirm your organization information. If any information is incorrect, return to the CDO Organizational Maintenance web form and edit your organization information on record. Remember to save and submit any edits. Then, regenerate your agreement.

I do not have a Replace link in the Agreement PDF table. How do I replace my existing CMS-CDO Agreement?

If the Replace link is not available on the CDO Summary page of the CDO Organizational Maintenance web form, your previously submitted agreement may be under CMS review. Once CMS sends you a determination email identifying whether CMS accepts your CMS-CDO Agreement or not, you can access the maintenance web form and select the Replace link in the Agreement PDF table.

If you are unsure if your organization submitted an agreement recently, please contact us at CACQuestions@cms.hhs.gov.

What if the CDO Application web form does not let me add my state in the Service Location section?

If your state operates a State-based Marketplace (SBM) or State-based Marketplace using the Federal Platform (SBM-FP), the CDO Application web form will not list your state in the Service Location state picklist.

If you are not sure what Marketplace type your state operates, email us at CACQuestions@cms.hhs.gov.

CDO Renewals

As an Existing CDO, can I just resubmit my initial CMS-CDO Agreement from 2 years ago to complete the renewal?

No, to renew your CDO certification, your organization's unique contacts must access the CDO Organizational Maintenance web form and upload a new signed and dated CMS-CDO Agreement.

If you do not renew your CDO certification before its expiration date, you will become inactive. Your organization will need to re-apply since your CDO ID will no longer be valid. Per the CMS-CDO Agreement, you must also inform your CACs to stop providing enrollment assistance as CACs.

How do I know when I need to renew the CMS-CDO Agreement as an Existing CDO?

Per Section IV.1 (Effective Date; Term and Renewal) of the CMS-CDO Agreement, at the end of each two-year CDO term, organizations must renew participation in the CDO Program by updating their organization information and returning a new signed and dated CMS-CDO Agreement using the Organizational Maintenance web form before the expiration date of the organization's CMS-CDO Agreement and certification period.

You can find your expiration date on the CDO Summary page of the CDO Organizational Maintenance web form or you can email us at CACQuestions@cms.hhs.gov.

You can reference Section 3 of the Organizational Maintenance web form User Guide for instructions on updating your information and uploading a newly dated and signed CMS-CDO Agreement.

How do I check my expiration date?

You can find the date on which your CDO certification expires on the CDO Summary page of the CDO Organizational Maintenance web form or you can request this information by emailing us at CACQuestions@cms.hhs.gov.

If our initial contacts have changed, how do we access the maintenance web form to renew?

If none of your initial contacts are with your organization, please email us at CACQuestions@cms.hhs.gov and provide the following information for each of your new contacts:

- Full Name

- Title that person is assuming within your certified application counselor designated organization (CDO) – Organization Senior Official, CAC Project Director, or Secondary Contact (not required)
- Job title
- Phone number
- Email address

Once we receive this information, we will update your organization's contact list and will send the new contacts a Welcome Packet email with your organization's CDO ID, the counter signature page of the CMS-CDO Agreement, and critical information about the CAC Program.

What happens if we do not renew the CMS-CDO Agreement before its expiration?

If you do not renew your certified application counselor designated organization (CDO) certification with the Centers for Medicare & Medicaid Services (CMS) before your agreement and CDO certification expires, you will become inactive. Your organization will need to re-apply since your CDO ID will no longer be valid. Per the CMS-CDO Agreement, you must also inform your certified application counselors (CACs) to stop providing enrollment assistance as CACs.

Where can we learn more about renewals?

You can find the existing certified application counselor designated organization (CDO) renewal information by visiting the information for existing CDOs web page.

How long is the renewal good for?

Per Section IV.1 (Effective Date; Term and Renewal) of the CMS-CDO Agreement, successful renewal re-certifies your organization as a CDO for two (2)-years from the effective date of the newly dated and signed CMS-CDO Agreement.

What if we do not want to renew our CDO status and want to leave the program?

If you do not renew your certified application counselor designated organization (CDO) status before the expiration date of your CDO certification, you will become inactive. Your CDO ID will no longer be valid. Per the CMS-CDO Agreement, you must also inform your CACs to stop providing enrollment assistance as CACs.

If you would like to withdraw from the CDO Program anytime during your two-year certification period, per Section II.6 (Obligations and Conditions) and Section V (Termination) of the CMS-CDO Agreement, as authorized by 45 CFR 155.225, you must, among other things:

1. Send a formal written request to CMS at CACQuestions@cms.hhs.gov at least thirty (30) business days prior to the date that you intend for the CMS-CDO Agreement to terminate, where practicable. The written request should include your CDO ID and the date when your CMS-CDO Agreement will terminate.
2. Notify your organization's staff and volunteers that, as of the effective date of termination of its agreement with CMS, they will no longer be certified to provide enrollment and application assistance to consumers. Ensure that neither your organization nor your staff or volunteers hold

themselves out to the public as a designated organization or as a CAC, respectively, after the effective date of termination.

3. Keep in mind that consumer consent documents must be appropriately secured and retained for no less than six (6) years, unless a different and longer retention period has already been provided under other applicable federal law. Your organization's duty to protect and maintain the privacy and security of personally identifiable information (PII) survives its withdrawal from the CAC Program. Please refer to your organization's agreement with CMS, including the appendices to the agreement, for guidance on the requirements for record keeping of PII and personal health information (PHI).
4. Submit a request to CMS remove your organization's listing(s) from Find Local Help using the [Find Local Help Upkeep Tool](#) at least seven (7) business days before your organization will cease providing CAC services to the public, and in the event that such advance notice is not feasible, in no more than twenty-four (24) hours after your organization has ceased providing CAC services to the public.

I submitted my renewal CMS-CDO Agreement, are there other tasks my organization must complete at this time?

After submitting your CMS-CDO Agreement, you should add your CAC roster, or review your existing CAC roster and make any necessary changes.

For plan year 2021 and beyond, maintaining a roster of your existing CACs using the CDO Organizational Maintenance web form is necessary for your CACs to access assister certification training on the Marketplace Learning Management System (MLMS).

This feature will not automatically assign CAC IDs for you; your CAC Project Director is still responsible for assigning CAC IDs.

CAC Roster

What is the purpose of CAC IDs?

Per Section II.2.b.i (Obligations and Conditions) of the CMS-CDO Agreement, as authorized by 45 CFR 155.225, a CDO issues unique CAC IDs for staff and volunteers which assisters need to take the annual assister certification training on the MLMS.

In addition, per Section II.2.b.x.7 (Obligations and Conditions) of the CMS-CDO Agreement, as authorized by 45 CFR 155.225, consumers must enter a CAC's ID into their Marketplace application when receiving enrollment assistance from a CAC.

How do I assign CAC IDs?

For instructions on assigning CAC IDs, go to [How to Assign Unique CAC IDs](#).

How do I add my CACs to the CAC Roster for CMS?

CDOs have two options when adding your roster of CACs:

- Manually using the CDO Organizational Maintenance web form to submit information on your CACs one-by-one. You can manually add up to 5 CACs with this method, or
- Using the CAC Roster Template provided by CMS to collect information for many CACs at once and upload it to the CDO Organizational Maintenance web form.

To learn more about how to do manage your CAC roster, you can refer to videos and guides by visiting the [CDO Program web page](#).

Where can I find the CAC roster template?

To access the CAC Roster template:

1. Log in to the CDO Organizational Maintenance web form.
2. On the CDO Summary page, navigate to the CACs section.
3. Select the Add CAC Roster button.
4. Select the CAC Roster Template button. The web form will open the template.

Where can I find the manual CAC roster entry point?

To add your roster of certified application counselors (CACs) manually:

1. Log in to the CDO Organizational Maintenance web form.
2. On the CDO Summary page, navigate to the CACs section.
3. Select the Add CAC Roster button.
4. Select No to the question about whether you want to use the CAC Roster Template.

I am having trouble with the .CSV file for the Roster Template, what do I do?

To troubleshoot your issue with the .CSV file, please email us at CACQuestions@cms.hhs.gov and include the list of steps you are taking and attach a screenshot.

The roster asks me to save the .XML file, what do I do with that?

The maintenance web form is prompting you to save your CAC Roster as an .xml file to ensure error-free uploading to your CDO record. When prompted, save this .xml file for your organization's records.

What is the difference between the roster template and the manual entry?

The CAC Roster Template allows you to add all of your certified application counselors (CACs) to a .CSV file you can upload to the maintenance web form.

The manual entry option allows you to add up to five CACs by entering their information one by one.



I keep getting error messages when I try to enter data using the CAC Roster Template, even though I'm entering the data correctly, what do I do?

To troubleshoot your issue with the .CSV file, please email us at CACQuestions@cms.hhs.gov and include the list of steps you are taking prior to receiving an error message and attach a screenshot.

How do I edit the training certification date?

You cannot modify the Training Completion Date field. The system will automatically populate this field once your CACs complete the assister certification training in the Marketplace Learning Management System (MLMS).

For additional assistance with the assister certification training, please contact the MLMS team at MLMSHelpDesk@cms.hhs.gov.

How do I edit data for my CACs after adding them to the roster?

You can only edit a CAC's last name and email address. All other changes require you to decertify the CAC and add them again either manually or using the CAC Roster Template.

To edit a CAC's last name or email address on your CAC roster:

1. Log in to the CDO Organizational Maintenance web form.
2. Navigate to the CAC section of the CDO Summary page.
3. Locate the individual you need to modify and select the Edit link in the Action column of the CAC table.
4. On the CAC Contact Edit Page, modify the fields listed as needed
5. Select the Save and Return button.
6. On the CDO Summary page, select the Submit button.

How to I decertify a CAC?

To decertify a CAC from your CAC roster:

1. Log in to the CDO Organizational Maintenance web form.
2. On the CDO Summary Page, navigate to the CAC Roster Table.
3. Locate the individual you need to decertify and select the Decertify link in the Action column of the CAC table.
4. The web form will display a prompt asking if you want to decertify the contact. Select OK.
5. Once you select OK, the page will refresh and the web form will move the contact to the bottom of the CAC Roster Table. The web form will pre-populate the decertification date and you will no longer have the option to Edit or Decertify that CAC.
6. Repeat these steps for every CAC you need to decertify.
7. Select the Submit button to save all of your changes.

To access further instructions for maintaining your CAC roster, visit the Information for existing CDOs web page.

Why is the maintenance web form not accepting the CAC ID I am entering in the CAC Roster section?

The maintenance web form will not accept a CAC ID if:

- You are using an old CAC ID (i.e., the root ID has “CAC” in it instead of “CDO”)
- Another CAC on your roster has the same CAC ID (each ID must be unique)
- You are using a CAC ID affiliated with a decertified CAC (organizations should not recycle old IDs)
- Another CDO lists the CAC as a unique contact or as a CAC on their roster. If the CAC left that organization, the previous CDO must remove them as a contact or decertify them and remove them from their CAC roster.

If you have questions about errors you are receiving, contact us at CACQuestions@cms.hhs.gov and include a screenshot of the error message you are receiving.

To access further instructions for maintaining your CAC roster, visit the Information for existing CDOs web page.

What should I enter into the Previous CAC ID field?

The Previous CAC ID field is optional. The intent of this field is to allow organizations to enter a CAC’s previous CAC ID assigned to them by another organization or previously assigned to them by your organization.

I am receiving the following error message when attempting to update my Organization Senior Official, CAC Project Director, or Secondary Contact: “The contact you are attempting to add is already assigned to a different organization.” How do I proceed?

This error message means that another organization lists the individual you are adding as one of your unique contacts as a CAC on their CAC roster. Individuals cannot serve as a contact (i.e., Organization Senior Official, CAC Project Director, and Secondary Contact) for one CDO while serving as a CAC for another CDO.

To resolve this issue, the individual you are adding should contact their previous CDO and ask the organization to decertify them from the organization’s CAC roster. Once the organization decertifies the individual as a CAC for their organization, you can add the individual as one of your unique contacts using the maintenance web form.

If this issue persists, email us at CACQuestions@cms.hhs.gov for assistance.



I am receiving the following error message when attempting to upload my CAC roster: “The CAC contact you are attempting to add is already assigned to a different organization.” What does this mean?

This error message means that another CDO lists the individual you are adding to your CAC roster as one of their unique CDO contacts. Individuals cannot serve as a CAC for one CDO while serving as a unique contact (i.e., Organization Senior Official, CAC Project Director, and Secondary Contact) for another CDO.

To resolve this issue, the individual you are adding to your CAC roster should contact their previous CDO and ask the organization to replace them as one of the organization’s unique contacts. Once the organization does this, you can add the individual as one of your CACs on your CAC roster using the maintenance web form.

If this issue persists, email us at CACQuestions@cms.hhs.gov for assistance.

I am receiving the following error message when attempting to upload my CAC roster: “The CAC contact you are attempting to add is already listed as an active contact under this organization.” What does this mean?

This error message means that you already have the individual you are adding to your CAC roster listed on your existing roster. You can only list an individual once on your CAC roster using the same email address and/or CAC ID.

You can only edit a CAC's last name and email address. All other changes require you to decertify the CAC and add them again either manually or using the CAC Roster Template.

If you need to edit the individual’s last name or email address:

1. On the maintenance web form, navigate to the CAC section of the CDO Summary page.
2. Locate the individual you need to modify and select the Edit link in the Action column of the CAC table.
3. On the CAC Contact Edit Page, modify the CAC's last name or email address (these are the only editable fields) as needed.
4. Select the Save and Return button.
5. On the CDO Summary page, select the Submit button.

If this issue persists, email us at CACQuestions@cms.hhs.gov for assistance.

I am receiving the following error message when attempting to upload my CAC roster: “The CAC ID you are attempting to add is affiliated with a decertified contact in the system. You must assign this individual a new CAC ID to proceed.” What does this mean?

This error message means that you are attempting to add an individual you previously decertified from your CAC roster using the same CAC ID they were previously assigned. Once you decertify an individual on your CAC roster, you will need to assign them a new CAC ID to add them back to your roster.



To add an individual back to your CAC roster:

1. Assign the individual a new CAC ID.
2. On the maintenance web form, navigate to the CAC section of the CDO Summary page.
3. Select the Add CAC Roster button.
4. On the CAC Roster Upload Page, select whether you want to use the CAC Roster template. If you are only adding one CAC, you can select No and add the individual manually.
5. Add the contact and select the Save and Return button.
6. On the CDO Summary page, select the Submit button.

If this issue persists, email us at CACQuestions@cms.hhs.gov for assistance.

Other Administrative Data

How do I update any of the unique contacts for my CDO?

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 on file.

To update any of your organization's contacts:

1. Log into the [CDO Organizational Maintenance web form](#).
2. In the Contact Information table on the CDO Summary page, select the Edit link or the Replace link next to the title of the role you want to update.
3. When you complete your edits, select the Save and Return button.
4. On the CDO Summary page, select the Submit button.

If you change your Organization Senior Official information, the CDO Organizational Maintenance web form will prompt you to generate 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.

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.

How do I update our CDO Service Locations?

Your organization contacts must use the CDO Organizational Maintenance web form to update your organization information.

To update your CDO service locations:

1. Log into the [CDO Organizational Maintenance web form](#).
2. On the CDO Summary page, select the Edit button next to the Service Locations section.
3. Select the state you want to add or edit.
4. In the counties list, add or remove counties as needed and select the Update Table button.
5. Confirm your list in the Service Locations table and select the Save and Return button.
6. On the CDO Summary page, select the Submit button.

If you add or remove states from your service locations, the web form will prompt you to generate and upload a new CMS-CDO Agreement.

To generate an agreement using the CDO Organizational Maintenance web form:

1. Log in to the [CDO Organizational Maintenance web form](#).
2. In the Agreement PDF table, select the Add link.
3. On the Attestation and Agreement Upload page, select the Print PDF Agreement button.
4. Print the agreement and obtain the Organization Senior Official's signature.

To upload your agreement:

1. In the Agreement PDF table on the CDO Summary page, select the Add 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 button.
7. Back on the CDO Summary page, 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.

How do I update our headquarters information?

You must use the CDO Organizational Maintenance web form to update your organization information.

To update your headquarters' information:

1. Log into the [CDO Organizational Maintenance web form](#).
2. In the Organization Headquarters Information table on the CDO Summary page, select the Edit link.
3. On the Edit Organization Headquarters Information page, edit your information as needed.
4. When you complete your edits, select the Save and Return button.
5. On the CDO Summary page, select the Submit button.

If you change your headquarters' address, the web form will prompt you to generate and upload a new CMS-CDO Agreement.

To generate an agreement using the CDO Organizational Maintenance web form:

1. Log in to the [CDO Organizational Maintenance web form](#).
2. In the Agreement PDF table, select the Add link.
3. On the Attestation and Agreement Upload page, select the Print PDF Agreement button.
4. Print the agreement and obtain the Organization Senior Official's signature.

To upload your agreement:

1. In the Agreement PDF table on the CDO Summary page, select the Add 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.

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.

