Certified Application Counselor Designated Organization Organizational Maintenance Web Form Transcript

[Slide 1]
Welcome to the certified application counselor designated organization or CDO Organizational Maintenance web form webinar.

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During this webinar, I will describe the CDO Organizational Maintenance web form, demonstrate the web form, and discuss next steps and expectations. The intended audience for this webinar is Organization Senior Officials or CAC Project Directors who received preliminary approval from CMS and who, one need to upload their signed agreement, two, update their organization's information, or three, renew their CDO designation because it has been more than two years since they were last designated.

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Before we walk through the Organizational Maintenance web form, we will discuss the purpose of the web form and when you should use it.

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The purpose of the Organizational Maintenance web form is to provide a platform for organizations to upload their signed CMS-CDO Agreements, update and maintain their organization information with CMS, and renew their status as a CDO every two years.

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You will use the Organizational Maintenance web form for one of three reasons:

One, you received preliminary approval from CMS for your CDO application and now you need to upload your signed CMS-CDO agreement.

Two, you need to update your organization's information.

Three, two years have passed and you are operating as a CDO organization and you need to renew your designation. You will use the Organizational Maintenance web form to update your organization's information, generate a new signed agreement, and upload it for CMS' approval.

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Now we will discuss parts of the web form and the information you need to complete the web form and the information you will need to complete it.

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The Organizational Maintenance web form allows you to do multiple things with your organization's CMS record.

On the CDO Summary page, for example, you can upload your organization's CMS-CDO Agreement or, if your agreement is up-to-date and you want to update your organization's information, the CDO Summary page allows you to edit your organization's information. If you update your service locations, organization name, or contact information for your Organization Senior Official, the web form will prompt you to generate a new agreement. Then, the next time you log in, the web form will prompt you to upload your new signed agreement.

This functionality allows you to maintain your organization's CDO information and CDO designation in one place and ensures that CMS has current information about your organization, which is critical when providing programmatic updates and communications.

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You must have a code to access the web form. After CMS approves your CDO application, the Organization Senior Official and CAC Project Director will receive a preliminary approval email that contains the link to the Organizational Maintenance web form. The first time they access the web form they will create an access code. After that, if they forget your access code, they can have the option of resetting it.

If you are uploading a signed CMS-CDO agreement, make sure the file you are uploading is complete, in PDF format, and signed by the Organization Senior Official.

If you are updating your organization's information, make sure you have all of the information needed to complete your updates in one sitting.

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Now we will walk through the Organizational Maintenance web form.

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As I mentioned, after approving your application, CMS will send you an email with a link to the Organizational Maintenance web form. Select this link to access the Welcome Page of the web form.

At the top right-hand corner of the Organizational Maintenance web form is the **Guidance** link, which opens a Quick Start Guide that provides step-by-step instructions for completing this web form.

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You must enter or create an access code to proceed with the Organizational Maintenance web form.

You must enter an access code to proceed. If your organization has never accessed the web form before, select the **Create Access Code** button. This allows you to setup access codes for the Organization Senior Official and the CAC Project Director.

If you already have a login ID and access code, you can enter your information in the login fields at the bottom of the Welcome page.

If you forgot your login ID and access code, you can reset it using the **Forgot Access Code** link at the bottom of the Welcome page.

So first, I will show you how to create an access code. To begin, select the **Create Access Code** button.

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On the Create Access Code page, you will begin by entering the Organization Senior Official or CAC Project Director's email address in the email address field provided.

I am going to enter my information. You will then create an access code. There are requirements for the access code. Notice how when I type, the requirements will turn green and the X's will turn into green check-marks so I have met all of my access code requirements and I'm ready to set up my security questions.

There are two security questions. Each has a drop-down menu to select from. I make my selection and then type in the answer to the question. I will repeat this for the second one. I will review my information and then select **Continue.**

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On the Access Code Confirmation page, you can see that I have successfully created an access code. You will select the **Continue** button. The web form navigates back to the Welcome page where you can use the information you just created to log in.

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If you setup your access code and forget your information next time you try to log in, you can select the **Forgot Access Code** link. I will demonstrate that now. For this example, I will use my email address. I will select the Send PIN button. When I do that, the system will send the email address to on record. Once I receive the email with the PIN, I will copy that and paste into PIN field on the Forgot Access Code page. Then, I will select **Continue**.

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I am now on the Reset Access Code page, where I reset my Access Code. Once again, as I type, the access code requirements will turn green into check-marks as I achieve them. Next, I need to answer the security questions and then select **Continue**.

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The Access Code Reset Confirmation page states that I have successfully reset my access code. I will select the **Continue** button to return to the Welcome page and log in.

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Now that we demonstrated how to create and reset an access code, we will log in using the information we setup. So first, I will enter my email address, followed by my passcode and select the **Login** button.

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We are now on the CDO Summary Page. This page allows you to upload your signed agreement and review and edit your organization's information. Each section on the CDO Summary page represents a section of the CDO application web form.

The first section on the page is the Agreement PDF section. In the Agreement PDF table, you can view or add your CMS-CDO Signed Agreement.

I will first demonstrate how to add CMS-CDO Agreement. CMS needs a new signed agreement for your organization if CMS recently approved your organization's application and does not have a signed agreement on file, you made changes to your organization's information that impacts your agreement, or your organization's agreement has expired because it is more than two years old.

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To upload your CMS-CDO Signed Agreement, select the **Add** link. So I am being prompted to upload my agreement. Because this the first time I am logging in. I just received my approval email and I am going to upload my agreement.

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The Attestation and Agreement Upload page will appear.

If you need to generate or download a copy of your prepopulated CMS-CDO Agreement, you can select the **Print PDF Agreement** button. This will either open a different browser window or it will prompt you to open the file at the bottom of your screen where you can select the **Open** button. This opens the prepopulated agreement for my organization. I will then save this file and obtain the signature of the Senior Organization Official, which in this instance is myself. I will then scan it and return to the web form to upload it.

Back on the Attestation and Agreement Upload page, I will select the **Browse** button. I am going to browse to the location to where I saved my agreement and I am going to select it. I select the **Upload Attachment** button. Now a table appears, which allows me to select a **View** link**,** to view my agreement I just uploaded. So I will view my agreement to make sure that is accurate and I will return to the web form and I then will select the **Submit** button.

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The Confirmation page now appears. This page provides a summary of your session and allows you to print and save a PDF confirmation containing the information you submitted. CMS recommends that you print and save this confirmation for your records. You will only be able to access this confirmation at the end of your session. It is not saved and you cannot return to save and print it later.

At the bottom of the screen, you can select the **PDF** button to generate that PDF confirmation. A separate window will open in your browser or you will be prompted to open the file. I can review my confirmation, save it, and print it for my records.

Back on the confirmation page to exit the web form, I will select the **Exit** button.

Please note – after you upload your signed CMS-CDO Agreement, you will not be able to make any additional changes to your organization's information until CMS approves your agreement. You will receive an email once CMS makes their final determination. So I am going to exit the web form and return to the welcome page and log back in to update my organization's information.

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So in this scenario, I have uploaded my organization's signed CMS CDO Agreement, and I received an email approving my agreement.

So I am now returning to the web form because I need to make some updates to my organization's information. I am going to enter my Login ID and passcode.

I am going to select the **Login** button.

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We are on the CDO Summary page. Now I will demonstrate how to edit each section of your CDO Application. Each section from the application is shown here on the CDO Summary page. Each section has an **Edit** link next to it. I am going to start with the Organization Headquarters' information. I am going to select the **Edit** link.

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On the Edit Organization Headquarters Information page, I can update any of my organization's information, including my organization's name, phone number, email address, and organization headquarters' address. I can also add my organization website URL or add the Federal Employee Identification Number (if I did not previously enter it), but notice that those fields are not required. I am going to change the organization phone number here, and select the **Save and Return** button to save my information and return to the CDO Summary page.

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Back on CDO Summary Page, I am going to scroll down to edit the Service Locations.

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When I select the **Edit** link, I get to the Service Locations page. If I scroll down to the bottom of this page, I can see the Service Locations table, and this contains the current service locations for my organization. These are the ones I entered on my application.

So notice I am operating in New Jersey and offering enrollment assistance in two counties in New Jersey. I want to add a couple of counties. To do that, I can scroll up to the service locations and select my state, which is New Jersey. When I do that, the Available Counties list prepopulates. Notice that the two counties I already selected are shown in the Selected Counties list on right side of the screen and the remainder list of counties are listed on the left side of the screen.

I am going to add one county by selecting the county and selecting the **Move Selected** button or **Single Arrow** button. Doing so, adds the selected county to my Selected Counties list. I am going add all my new counties. I am going to add three new counties. Then, I am going to select the **Update Tables** button. Doing so updates the Service Locations table at the bottom of the screen. So now, notice that instead of two counties, I now have five counties on my list. To save my change and return to the CDO Summary page, I will select the **Save and Return** button**.**

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Next, I am going to edit my additional organization details by selecting the **Edit** link.

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On the Edit Additional Organization Details page, I can edit any other sections from this part of the application. I can change Primary Organization Type. Remember you can only select one. Currently I have selected Social Services type, so I am going to keep that. Organization specialty—you can select all that apply. You can also edit your enrollment assistance type. I am going to keep mine as year-round. And in the last section, I am going to keep responses the same to all three questions.

To save the information and return, I am going select the **Save and Return** button.

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The Contact Information section allows me to edit or replace any of the three contacts that I selected for my organization. So first, I am going to edit a contact. I am going to edit my CAC Project Director Contact information. I am going to select the **Edit** link.

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Okay, now we are on the Edit Contact Information page. Notice that in Current CAC Project Director Contact section, all of the fields are prepopulated. So now I can make my change. So I am going to change their phone number and then select **Save and Return**.

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Back on the CDO Summary page once again, I am going to scroll down to the Contact Information Section and now I am going to demonstrate how to replace a contact. Then I am going replace my Current Organization Official, which is myself. I am going to replace myself.

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On the Replace Contact Information page, notice that Current Organization Senior Official field is blank. That is because I am replacing the contact, not just editing it. So I know I have blank fields where I can enter new information. Ken is going to replace me. I am going to enter his information: first name, last name, email address, job title, and phone number. He is going to be the new owner.

I am going to select the **Save and Return** button.

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I am back on the CDO Summary page. I am going to scroll down to Contact Information section to make sure that the changes I made were kept and Ken Circle is now listed as the Organization Senior Official.

If you make changes to your organization's information during your session that impacts your agreement, notice at the top under Agreement PDF section, there is a now **Replace** link. The system is prompting you to replace your existing agreement with a new agreement because you changed information that impacts the agreement.

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To generate your up-to-date signed agreement you are going to select the **Replace** link and you have two options for doing this. The first option is you can keep the web form open, obtain your Organization Senior Official's signature, and return to the web form within 60 minutes to upload that document. Or you can exit the web form, obtain your organization's senior official signature, log back on and upload your agreement.

For purposes of this scenario, I am going to stay in the system. Let's say that I have obtained the new signature I need, I scanned the document, and I have come back.

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Once you have the document, you can select the **Print PDF Agreement** button. I already have my copy. I am going to select the **Browse** button, select the new file, and select the **Upload Attachment** button. I can view my new file to make sure it is the correct file. I am going to select the **View** link. It opens a separate browser window; I can review the information to make sure I have uploaded the correct file.

Back on the web form, I am going to select the **Submit** button.

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The Confirmation page provides a summary of your session and allows you to print and save a PDF confirmation containing the information you submitted. CMS recommends that you print and save this confirmation for your records. Again, you will only be able to access this confirmation at the end of your session. It is not saved and you cannot return to save and print it later.

Select the **PDF** button to generate a PDF confirmation. Open the file, save and print for your records.

Back on the web form to exit the web form, you will select the **Exit** button.

This now completes this demonstration and presentation. Thank you for your participation.