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Introduction

1. Introduction

Certified application counselor designated organizations (CDOs) are a vital component of the assister community. In the Federally-facilitated Marketplaces (FFMs), CDOs oversee certified application counselors (CACs) who are trained and able to help consumers seeking health insurance coverage options through an FFM.

Organizations that wish to become CDOs designated by the Centers for Medicare & Medicaid Services (CMS) to serve in an FFM must submit an online application and enter into an agreement with CMS.

The CDO application allows qualified organizations to apply to become a CDO with CMS. In an FFM, CMS designates organizations that meet specific eligibility criteria as CDOs.

Approved CDOs complete a signed CMS-CDO agreement after receiving approval from CMS on the application submission.

The CDO Organizational Maintenance Web Form, referred to as the maintenance web form, is the platform that CDOs use to maintain information about their organization with CMS, including their CAC roster.

1.1. Helpful Resources & Tips Before Getting Started

Before you start, reference this user guide to understand what information you need to complete the maintenance web form.

For additional CDO maintenance web form and CAC roster information please access the following resources:

- CDO Program web page – contains additional resources and information for organizations interested in becoming a CDO.
- CDO Learning Series – CDO Data Management – discusses resources available to you as a CDO and how to maintain information with CMS during the agreement period.
- CDO Roster Job Aid – provides step-by-step instructions about adding and updating a CAC roster.
- CDO Renewal Job Aid – provides step-by-step instructions about adding and updating your organization’s information and submit a new signed and dated CMS-CDO agreement when required.
- CDO Organizational Maintenance Web Form Demonstration video – Overview and Access Code – provides an overview of the maintenance web form and a step-by-step demonstration of how to setup an access code and how to submit a CMS-CDO agreement the first time using the maintenance web form.
- CDO Organizational Maintenance Web Form Troubleshooting FAQs – provides frequently asked questions about the maintenance web form and CAC application process including the CAC roster.
- CDO Learning Series – CDO Renewal video – discusses the process for renewing your CDO agreement with CMS.
Introduction

- **CDO Learning Series – CAC Roster** – discusses the process for CDOs to add, update, and decertify CACs for the CAC roster.

For information on the CDO application process please access the following resource:

- **CDO Learning Series – CDO Application** – discusses the CDO application process.

**1.2. CDO Organizational Maintenance Web Form Process Overview**

**Warning:** Submitting your signed CMS-CDO agreement does not guarantee approval of your organization as a CDO. Your organization cannot operate as a CDO until you receive official approval and a CDO ID from CMS.

You will use the maintenance web form to:

- Submit a new or renew an existing CMS-CDO agreement.
- **New Applicants** complete both steps of the CDO application process by first submitting a CDO application and then uploading a signed CMS-CDO agreement after receiving approval from CMS on the application submission.
- **Existing CDOs** complete their renewal within a timeframe determined by CMS, typically two years from the effective date, by reviewing existing organization information and uploading a new signed CMS-CDO agreement.
- Maintain administrative data on CDO headquarter location, service locations, designated contacts information, etc.
- If you update your Operating State, Organization Name or Organization Senior Official’s name, you must execute an entirely new agreement with CMS.
- If you update your Service Location(s) or Headquarters Address, CMS will acknowledge these changes through an update to your record with CMS and will provide written confirmation of the amendment to your previously signed CMS-CDO agreement.
- Submit and maintain a roster of certified application counselors (CACs).
- Monitor CAC annual certification data from the Marketplace Learning Management System (MLMS).

New applicants can access the maintenance web form only after receiving a preliminary approval email from CMS, upon approval of the CDO application submitted through the CDO Application web form. Moving forward, you can access the maintenance web form to keep your information up to date with CMS.

**Note:** Your leadership contacts (Organization Senior Official, CAC Project Director, or Secondary Contact, if applicable) must use the email address entered on the CDO application when creating an access code or logging in to the maintenance web form.
2. Welcome Page

After approving your application, CMS will send you an email with a link to the maintenance web form. Select the link to access the Welcome page to the CDO Organizational Maintenance Web Form.

![Figure 1: Welcome to the Organizational Maintenance Web Form Page](image)

Upon your initial login, you must enter or create an access code (password) to proceed with the maintenance web form; you will follow different paths in the maintenance web form if you need to create an access code,
you have an access code, or you forgot your access code. Table 1 provides guidance about how to proceed to the appropriate section of this user guide with instructions for each section.

### Table 1: Welcome Page Options

<table>
<thead>
<tr>
<th>If</th>
<th>Then</th>
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<tbody>
<tr>
<td>You need to create an access code</td>
<td>Refer to Section 2.1.</td>
</tr>
<tr>
<td>(password)</td>
<td></td>
</tr>
<tr>
<td>You have an access code (password)</td>
<td>Refer to Section 2.2.</td>
</tr>
<tr>
<td>You forgot your access code (password)</td>
<td>Refer to Section 2.3.</td>
</tr>
</tbody>
</table>

#### 2.1. Create Access Code (Password)

If this is the first time accessing the maintenance web form and you do not have an access code, you will need to create one. To create an access code (password):

1. Select **Create Access Code** on the **Welcome** page of the maintenance web form.

   ![Create Access Code Button](Figure 2: Create Access Code Button)

   **Instructions**
   
   You must have an access code (password) or create an access code (password) to access the Organizational Maintenance web form.

   **I have not created an access code (password)**
   
   Select the **Create Access Code** button to create an access code (password).

   2. Enter the **email address** for the **Organization Senior Official, CAC Project Director**, or **Secondary Contact** (if applicable) exactly as it appears on your CDO application.

   **Note:** The maintenance web form generates your organization’s list of contacts based on the information you entered in to the CDO application. You must enter the same email address for the Organization Senior Official, CAC Project Director, or Secondary Contact as you did on your CDO application.

   3. Create and enter an **Access Code** that meets the requirements.
   4. Confirm the **Access Code** by entering it again.
Welcome Page

**Note:** Please remember your access code as you will use this code to log into the maintenance web form.

5. Select two *security questions* and enter the corresponding *responses* to each.
6. Select *Continue* to proceed.

**Figure 3: Create Access Code Page Fields**

7. The maintenance web form will take you to the *Access Code Confirmation* page. On the *Access Code Confirmation* page, select *Continue*. The maintenance web form will return you to the login page.
Welcome Page

Refer to Table 1 to proceed through the login process.

Access Code Confirmation

You successfully created an access code. Select the Continue button to log into the Organizational Maintenance web form.

Figure 4: Access Code Confirmation Page Continue Button

2.2. I Have an Access Code

If you already have an access code, proceed to I have an access code on the Welcome page.

1. Enter your Login ID (i.e., your email address on record).
2. Enter your Access Code.
3. Select Login.

Figure 5: Welcome Page Login Button
2.3. Forgot Access Code

If you forgot your access code, select the **Forgot Access Code** link on the **Welcome** page.

**I have an access code (password)**
Enter the Organization Senior Official or CAC Project Director email address in the Login ID field and the access code (password) you created in a previous session in the Access Code field. Then select the Login button.

If you forgot your access code (password), select the **Forgot Access Code** link to reset your access code (password).

![Figure 6: Welcome Page Forgot Access Code Link](image)

On the **Forgot Access Code** page:

1. Enter your **email address** on record.
2. Select **Send PIN**. The maintenance web form will send a PIN to the email address on record. The PIN expires in 24 hours.

**Forgot Access Code**

**Instructions**
Enter the Organization Senior Official or CAC Project Director, or Secondary Contact email address in the field provided and select the Send PIN button. A PIN will be sent to the Organization Senior Official or CAC Project Director email address on record. The PIN will expire in 24 hours. Once you receive the six-digit PIN, you must enter it into the PIN field below and select the Continue button to reset your access code (password). The red asterisk (*) indicates required fields.

![Figure 7: Forgot Access Code Page Send PIN Button](image)

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. On the **Forgot Access Code** page, enter the **email address** and **PIN**.
4. Select **Continue**. The maintenance web form will take you to the **Reset Access Code** page.

On the Reset Access Code page:

1. Create and enter an **Access Code** that meets the requirements.
2. Confirm the **Access Code** by entering it again.
3. Enter the **corresponding responses** to each of the previously established security questions.
4. Select **Continue** to proceed.

**Note:** Please remember your access code as you will use this code to log into the maintenance web form.
5. On the **Access Code Reset Confirmation** page, select **Continue**. The maintenance web form will return you to the login page.
The CDO Summary Page allows you to review and/or edit your organization’s information, update the CAC Roster, and upload your signed agreement.

CMS encourages CDOs to review and update all your organization’s information (addresses, contacts, services area, etc.) **before** uploading the agreement.

The maintenance web form will prompt you when your CMS-CDO agreement needs updating.

You can access a CDO Submissions Summary of all the changes submitted by selecting View All Submissions.

---

**Figure 12: CMS-CDO Agreement Prompt and View All Submissions Link**

CMS needs a new CMS-CDO agreement signed by the Organization Senior Official if:

- CMS recently approved your CDO application and does not have a signed agreement on file for your organization.
- You made changes to your organization’s information that affects your agreement. These changes include Operating State, Organization Name, or Organization Senior Official’s name.
- Your CMS-CDO agreement expired.

If you submitted a new CMS-CDO agreement or made a change during your last session that generated an amendment to your agreement, the maintenance web form will lock down and you will not be able to make any updates while your agreement or amendment is under review.

---

**Figure 13: CMS-CDO Lock Down Prompt**

Each section on the CDO Summary page represents a section of the CDO application web form. **Table 2** provides guidance about how to proceed to the appropriate section of this user guide with instructions for each section.
CDO Summary Page

Table 2: CDO Summary Page Sections

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<td>Refer to Section 3.1.</td>
</tr>
<tr>
<td>You want to review and/or edit your organization’s headquarters information</td>
<td>Refer to Section 3.2.</td>
</tr>
<tr>
<td>You want to review and/or edit your organization’s service locations</td>
<td>Refer to Section 3.3.</td>
</tr>
<tr>
<td>You want to review and/or edit your organization’s additional details</td>
<td>Refer to Section 3.4.</td>
</tr>
<tr>
<td>You want to edit or replace the contact information for one or more of your organization’s contacts</td>
<td>Refer to Section 3.5.</td>
</tr>
<tr>
<td>You want to view and/or replace your CMS-CDO signed agreement</td>
<td>Refer to Section 3.6.</td>
</tr>
</tbody>
</table>

3.1. Agreement PDF Table

The Agreement PDF table includes links that allow you to add, view, or replace your CMS-CDO signed agreement as needed. If you are on this page for the first time, you will have only one link to add your agreement.

3.1.1. Add Agreement

Select Add to upload your signed CMS-CDO agreement.

![Figure 14: Agreement PDF Table Add Link](image)

3.1.2. Attestation and Agreement Upload

The Attestation and Agreement Upload page allows you to upload your signed CMS-CDO agreement.

**Note:** Follow the instructions provided to upload a scanned copy of pages 1 – 12 of the agreement to the maintenance web form. If your scanned copy is larger than 10 GB, please re-scan at a lower resolution. We cannot accept an agreement that does not include pages 1 – 12.

To upload your signed CMS-CDO agreement:

1. Select Upload a File.
2. In the pop-up window, navigate to the place where you saved the PDF version of your signed CMS-CDO agreement on your computer and select the file. The maintenance web form will return you to the Attestation and Agreement Upload page.

3. Select View to open your file. If the agreement did not upload, the maintenance web form will display a warning message.
4. Select **Save & Return** to return to the **CDO Summary** page.

![Figure 17: Save & Return Button](image17)

5. On the **CDO Summary** page, select **Submit** at the top or the bottom of the page to submit your CMS-CDO agreement.

![Figure 18: CDO Summary Page Submit Button](image18)

**Warning:** After you submit a CMS-CDO agreement, CMS will review the agreement. While an agreement is under review by CMS your account is locked and you will be unable to edit your organization’s information, including your CAC roster. After receiving a determination email your account will be unlocked again and you will be able to edit your organization’s information using the maintenance web form.

Refer to **Section 4** for Confirmation page instructions.
CDO Summary Page

3.2. Organization Headquarters Information Section

The Organization Headquarters Information section allows you to review and/or edit your organization’s headquarters information.

1. In the Organization Headquarters Information table of the CDO Summary page, select Edit to edit your organization headquarters information. The maintenance web form will take you to the Edit Organization Headquarters Information page.

![Organization Headquarters Information](image)

2. On the Edit Organization Headquarters Information page, update your information as needed for the following:

- Name
- Federal Employee Identification Number (FEIN) (if applicable)
- Phone Number
- Email Address
- Website URL (if applicable)
- Street Address
- City
- State
- Zip Code
3. When edits are complete, select Save & Return to save your updates. The maintenance web form will return you to the CDO Summary page.

Refer to Table 2 and continue editing your organization’s information.

**Warning:** If you change your organization’s name, when you select Save & Return the maintenance web form will navigate to the CDO Summary page and give you a warning message. The message will prompt you to generate and submit an up-to-date signed agreement. Refer to Section 3.6 Replace Agreement for instructions on how to generate and upload your updated CMS-CDO agreement.

*Make all necessary updates before submitting and uploading a new agreement.*
3.3. Service Locations Table

The Service Locations table allows you to review and/or edit the states and counties in which your organization provides enrollment assistance.

1. In the Service Locations table of the CDO Summary page, select Edit to edit your service locations. The maintenance web form navigates to the Edit Service Locations page.

2. On the Service Locations page, select the state in which your organization will provide enrollment assistance services from the drop-down menu. The Available Counties list will populate with the counties for the state chosen.

3. Select the county or counties in which your organization will provide enrollment assistance services.
4. Move the **applicable counties** to the **Selected Counties** table by using the arrows in the **Available Counties** table. You may filter the list of counties by entering the county name in **Filter**.

5. The **Selected Counties** table will include all service locations your selected for the organization. Select **Update Table**.
Figure 25: Service Locations Page Selected Counties List and Update Table Button
6. Repeat steps 2 to 6 for each state in which your organization will provide enrollment assistance services.

7. When edits are complete, select **Save & Return** to save your updates. The maintenance web form will return you to the **CDO Summary** page.

**Warning:** If you add or remove service location state(s), when you select Save & Return the maintenance web form will navigate to the CDO Summary page and give you a warning message. The message will prompt you to generate and submit an up-to-date signed agreement. Refer to **Section 3.6 Replace Agreement** for instructions on how to generate and upload your updated CMS-CDO agreement.

*Make all necessary updates before submitting and uploading a new agreement.*

Refer to **Table 2** to continue editing your organization’s information.

### 3.4. Additional Organization Information

The Additional Organization Information table allows you to review and/or edit information about the type of work your organization performs.

1. In the **Additional Organization Information** table of the **CDO Summary** page, select **Edit** to edit your additional organization information. The maintenance web form navigates to the **Edit Additional Organization Details** page.
2. On the **Edit Additional Organization Details** page, update your information as needed for the following:

- Primary Organization Type
- Organization Specialty
- Enrollment Assistance type
- Organization Processes
3. When edits are complete, select **Save & Return** to save your updates. The maintenance web form will return you to the **CDO Summary** page.

Refer to **Table 2** to continue editing your organization’s information.
3.5. Contact Information

The Edit Contact Information table allows you to review and/or edit information for your organization’s contacts. CMS requires each organization to have an Organization Senior Official and a CDO Project Director. Though not a requirement, you may designate a third contact, referred to as the Secondary Contact.

3.5.1. Manage Contacts

To make changes to any of your organization’s contact information, select Manage Contacts in the Contact Information table of the CDO Summary page.

3.5.2. Edit, Replace, or Move Contact:

To edit a contact (e.g., an existing contact’s last name changes or their email address or phone number changed), replace a contact (e.g., an existing contact left the organization and someone else is taking their place), or move a contact to a different role, review the information on the Edit Contact Information page prepopulated with the Organization Contact Information on record.

1. Update any of the information shown for each contact on the Edit Contact Information page.
2. Select Save & Return either at the top or the bottom of the page. The maintenance web form will return you to the CDO Summary page.
### 3.5.3. Secondary Contact

To add a secondary contact:

1. Select **Manage Contacts** in the **Contact Information** table of the **CDO Summary** page.
2. Select *Add Secondary Contact*.

3. Enter the *Secondary Contact* information and select *Save & Return*. 
4. The maintenance web form returns you to the **CDO Summary** page and the **Secondary Contact** table shows the **Secondary Contact** information you added.

To remove a Secondary Contact:

5. Select **Manage Contacts** in the **Contact Information** table of the **CDO Summary** page.
6. Select *Delete* at the bottom of the *Secondary Contact* table.
7. The **Edit Contact Information** page will no longer list anything in the **Secondary Contact** table. When edits are complete, select **Save & Return**.

8. The **CDO Summary** page will re-fresh and will no longer list anything in the **Contact Information** table for a secondary contact.
Warning: If you change your Organization Senior Official contact, when you select Save & Return the maintenance web form will navigate to the CDO Summary page and give you a warning message. The message will prompt you to generate and submit an up-to-date signed agreement. Refer to Section 3.6 Replace Agreement for instructions on how to generate and upload your updated CMS-CDO agreement.

Make all necessary updates before submitting and uploading a new agreement.
3.6. Replace Agreement

If you made changes to the Organization Name, Operating State, and/or Organization Senior Official’s name during your session, the Replace link will appear in the Agreement PDF table on the CDO Summary page, and the maintenance web form will prompt you to generate an up-to-date signed CMS-CDO agreement.

**Warning:** After you submit a CMS-CDO agreement, CMS will review the agreement. While an agreement is under review by CMS, you will be unable to edit your organization’s information. After receiving a determination email, you will be able to edit your organization’s information using the maintenance web form.

To generate your up-to-date signed CMS-CDO agreement:

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

   ![Figure 38: Warning Message and Agreement PDF Table Replace Link](image)

2. A pop-up will appear asking if you need to make any changes to your information before you proceed to uploading an agreement. Select **OK** to proceed to upload your agreement. Select **Cancel** to stay on the **CDO Summary** page and change your information or add your CAC roster as needed.

   ![Figure 39: Warning Message for Agreement Replace Link and OK Button](image)
Select **Print PDF Agreement**. The maintenance web form opens a new window in your internet browser that displays your updated CMS-CDO agreement.

![Print PDF Agreement Button](image)

Return to the maintenance web form window in your internet browser.

You have two options for when to upload your signed agreement. You can (1) keep the maintenance web form open, obtain your Organization Senior Official’s signature, and return to the maintenance web form within 60 minutes or (2) you can exit the maintenance web form, obtain your Organization Senior Official’s signature, and log back into the maintenance web form later.

Refer to **Table 3** for instructions for each option.

<table>
<thead>
<tr>
<th>If</th>
<th>Then</th>
</tr>
</thead>
</table>
| You want to remain in the maintenance web form to upload your up-to-date agreement. | 1. Outside of the maintenance web form, obtain your Organization Senior Official’s signature on the updated CMS-CDO agreement. Your session will expire in 60 minutes so make sure you return to the maintenance web form within this time. If your session expires, follow the instructions in the next row of this table.  
2. Refer to **Section 3.1.2** of this guide for instructions for uploading your up-to-date CMS-CDO signed agreement on the **Attestation and Agreement Upload** page of the maintenance web form. |
| You want to return to the maintenance web form to upload your up-to-date agreement | 1. On the **Attestation and Agreement Upload** page, select **Cancel** (refer to **Figure 41**).  
2. At the bottom of the **CDO Summary** page, select **Exit** (refer to **Figure 42**).  
3. Outside of the maintenance web form, obtain your Organization Senior Official’s signature on the updated CMS-CDO agreement.  
4. Return to the maintenance web form and refer to **Section 3.1.2** of this guide for instructions for uploading your up-to-date CMS-CDO signed agreement on the **Attestation and Agreement Upload** page of the maintenance web form. |
Attestation and Agreement Upload

Instructions

To successfully complete the CDO application process, your organization must attest to the information submitted in this form. To attest that the information provided is complete and true to the best of your knowledge, complete the attestation form and upload a signed copy. Only the Organization Series ID can be entered on your application; sign the OHS CDO agreement.

Please select Yes or No:

Agreement form has not been uploaded.

Figure 41: Attestation and Agreement Upload Page Cancel Button

Figure 42: CDO Summary Page Exit Button
4. Confirmation Page

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. You will only be able to access this confirmation at the end of your session. The confirmation does not save, and you cannot return to save and print it later.

1. Select **Print PDF** to generate a PDF confirmation.

2. Select **Exit** to exit the maintenance web form.

![Confirmation Page Print PDF Button](image)
Confirmation

Thank you for your submission.

Warning: Please print the PDF for your records before selecting the Exit button.

Print and save the confirmation PDF below for your records; it is a formal confirmation of your submission. If you have any questions, contact CACQuestions@cms.hhs.gov. Ensure you add the CMS Services address CACQuestions@cms.hhs.gov to your contacts and spam filters so you do not miss any responses.

Agreement Submission End Time: 7/1/2021 9:51 AM

An acknowledgment email has been sent to the following contacts:

userroqg@email.com
userrois@email.com

Print/Save

Select Print PDF to generate a PDF confirmation that contains the information you submitted. It is recommended that you print and save this document for your records.

Print PDF Exit

Figure 44: Confirmation Page Exit Button
5. Active CAC Roster

CMS requires that CDOs add a roster of their active CACs using the maintenance web form. This is a required component to your CDO record with CMS during your two (2)-year agreement period. This feature will not automatically assign CAC IDs for you; your CAC Project Director is still responsible for assigning CAC IDs and documenting them on the maintenance web form.

You can access additional training materials, FAQs, and videos that describe how to complete the maintenance web form and the CAC roster on the CDO Program web page. This includes:

- **CDO Learning Series – CAC Roster video** – discusses the process for CDOs to add, update, and decertify CACs for the CAC roster.
- **CDO Organizational Maintenance Web Form Demonstration video – CAC Roster** – provides a step-by-step demonstration of how to add and update a CAC roster using the maintenance web form.
- **CAC Roster Job Aid** – provides step-by-step instructions about adding and updating a CAC roster.
- **CDO Organizational Maintenance Web Form Troubleshooting FAQs** – contains frequently asked questions about how and when to use the maintenance web form, including the CAC roster.

To access a web page that provides information for active CDOs including information about the CDO renewal requirement, the CAC roster, and how to maintain CDO information during the agreement period, visit the Information for active CDOs.

As an active CDO, you must assign unique IDs to each of your CACs and monitor their completion of the annual assister certification training. The ability to document your CAC information is available using the maintenance web form.

This functionality allows CDOs to:

- Document your CACs’ full names, email addresses, and CAC IDs.
- Monitor your CACs’ annual assister certification training completion dates from the MLMS.
- Maintain your roster of CACs during their two (2)-year agreement period.

Any of your organization’s leadership contacts can access the maintenance web form and complete these actions.

**Note:** Maintaining a roster of active CACs using the maintenance web form is necessary for CACs to access annual certification training on the MLMS.
5.1. Preparing for the CAC Roster

To prepare to upload your CAC roster:

1. Make sure your leadership contacts can access the maintenance web form.
2. Ensure every CAC has a unique ID. For guidance on assigning CAC ID, visit How to Assign Unique CAC IDs document.
3. Gather all the necessary CAC data and have it readily available to complete all the information for the roster:
   - First Name (exactly as it appears in MLMS/CMS Portal)
   - Last Name (exactly as it appears in MLMS/CMS Portal)
   - Email Address
   - Current CAC ID — e.g., USCD0Z9912345, a maximum of 13 characters in length
   - Previous CAC ID — (if applicable) any other ID a CAC has held with previous organizations or your organization that is no longer in use (this is not a required field)

5.2. Adding a CAC Roster

CDOs have two options when adding your roster of CACs:

1. Manually using the maintenance web form to submit information on your CACs one-by-one (you can manually add up to 5 CACs per session with this method).
2. Using a CMS provided template to collect information for as many CACs as you need to add at once and upload it to the maintenance web form.

On the CDO Summary page, scroll down to the CACs section. The first time you access this section, your CAC roster table will be empty. Once you add and submit your roster, you will be able to view and edit your CACs directly from this table on the CDO Summary page.
Active CAC Roster

To add your roster of CACs:

1. Select **Add CAC Roster**.

![Certified Application Counselors (CACs)](image)

**Figure 45: Add CAC Roster Button**

2. On the **CAC Roster Upload** page, review the **Instructions**.

![CAC Roster Upload](image)

**Instructions**

- Prior to adding your CAC Roster, collect the following information for each of your CACs:
  - first name
  - last name
  - email address
  - current CAC ID
  - previous CAC ID (optional)
- Required fields are indicated with a red asterisk (*).

**Figure 46: CAC Roster Upload Page Instructions**

*Note:* You can manually add up to five CACs per session or use the CAC roster template to upload a CSV file containing your list of CACs. You can use the template whether you have one CAC or more than five CACs, but you may find it most helpful to use it if you have more than five CACs.
5.2.1. Manual Process

Using the manual upload functionality on the maintenance web form, you can add up to five CACs, one-by-one in a single session. You can exit the maintenance web form and log back in to add another five CACs as many times as you want if you prefer the manual upload method.

To begin the manual upload process:


   **Warning:** Be sure if copying and pasting any information into the fields that you are checking for accuracy and extra spaces. This will help prevent error messages and issues with adding CACs.

   ![Figure 47: Manual Upload Button on CAC Roster Upload Page](image)

   **Instructions**
   - Prior to adding your CAC Roster, collect the following information for each of your CACs:
     - first name
     - last name
     - email address
     - current CAC ID
     - previous CAC ID (optional)
     - Required fields are indicated with a red asterisk (*).

   **Select which upload option you are going to use.**
   - CAC Roster Template
   - Manual Upload

   **Figure 47: Manual Upload Button on CAC Roster Upload Page**

2. Enter the **information** indicated by a red asterisk. The **Previous CAC ID field** is optional.

3. Select **Save** if only adding one CAC and **Save and New** if adding multiple CACs.
4. The **CAC Roster Summary Table** will appear displaying the information you just entered. Review the information carefully and select **Save and Return**.

5. The **CDO Summary** page will appear. Your **CAC** table will now display the CAC(s) you added. To submit your roster, select **Submit** either at the top or the bottom of the **CDO Summary** page.
6. The **Confirmation** page will appear. You can select **Print PDF** to print a copy of your information.

7. Select **Exit** to exit the maintenance web form.

---

**5.2.2. CAC Roster Template**

The purpose of the CAC Roster template is to provide CDOs a streamlined way to import and maintain your CAC information. The template is available for CDOs to collect CAC information and generate a CSV file for upload to the maintenance web form.
Active CAC Roster

Best Practices for using the template:

- Follow all the instructions on the initial Instructions Tab and the CAC Roster tab.
- Make sure to select Enable Editing and Enable Content in the yellow ribbon at the top of the template before attempting to add CACs on the template.
- Enter all required CAC data before moving to the next field; the template will not allow you to move forward if it detects missing or incorrect data.
- Sometimes copying and pasting data into the template adds phantom spaces that will generate error messages.

**Note:** You cannot reuse your existing CAC Roster when making additions to your roster. You must use a clean version of the CAC Roster template when adding CACs to your roster.

- Consider checking the cell for extra spaces before or after the entered data.
- Consider entering the data into the cell manually as opposed to copying and pasting the data into the cell.

1. Select **CAC Roster Template** on the **CAC Roster Upload** page.

2. Select **CAC Roster Template** on the **CAC Roster Template Upload** page to open and create your CAC roster file. The CAC roster template will open on the instructions page. Review the instructions before you continue.
Active CAC Roster

3. Select your file in the lower left corner tab of your screen.

4. Select **Enable Editing**.

5. Select **Enable Content**.

Tips for the CAC Roster Template:
- There are two tabs, Instructions and Roster. The instructions tab provides guidance on what information is needed, and the CAC Roster tab provides templates for CDOs to collect the necessary information.
- You must select the Enable Editing button and then select the Enable Content button at the top of this template to proceed.
- If copying and pasting from another spreadsheet, remove any extra spaces that may have carried over BEFORE creating the CSV file.
6. Review the information on the **Instructions** tab.

   ![Figure 57: CAC Roster Template Instructions](image)

   **Figure 57: CAC Roster Template Instructions**

7. Select the **CAC Roster** tab.

   ![Figure 58: CAC Roster Tab](image)

   **Figure 58: CAC Roster Tab**

8. Start on row 11 and enter the **information** indicated by a red asterisk. The **Previous CAC ID** is only if applicable and is optional.

   ![Figure 59: CAC Information Fields](image)

   **Figure 59: CAC Information Fields**

   **Note:** The First Name AND Last Name on your roster must match the CAC’s information on their Centers for Medicare & Medicaid Services (CMS) Portal Account match EXACTLY.

9. Select **Add CAC** to add your next CAC.
10. When finished adding your CACs, select **Create CAC Roster**.

11. Select **OK**.

12. Select the location where to save the file and select **OK**.
13. A pop-up will appear confirming that the CAC roster CSV file saved. Select OK.
Active CAC Roster

On the CAC Roster Template Upload page:

1. In the **CAC Roster Template Upload** section, select **Upload a File**. Locate and select the .CSV file you just created and saved on your computer. Select **Save and Return**.

---

**Note:** The CSV file will remain on your screen. To continue with the process, return to the maintenance web form in your browser.
Active CAC Roster

2. Your CAC roster file will show in the **Attachment Summary** table. Select **Save and Return**.

3. On the **CDO Summary** page the **CAC** table now displays the CAC you added. Select **Submit** to submit your roster.

---

### Attachment Summary

<table>
<thead>
<tr>
<th>Action</th>
<th>File Name</th>
<th>File Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>CacRosterUpload.csv</td>
<td>0.0000 MB</td>
</tr>
</tbody>
</table>

**Figure 66: CAC Roster Attachment Summary and Save and Return Button**

### Certified Application Counselors (CACs)

<table>
<thead>
<tr>
<th>Action</th>
<th>Certification Status</th>
<th>Training Completion Date</th>
<th>Decertification Date</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
<th>Current CAC ID</th>
<th>Previous CAC ID</th>
<th>Previous CAC ID</th>
<th>Previous CAC ID</th>
<th>Previous CAC ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Off</td>
<td>Inactive</td>
<td></td>
<td></td>
<td>Test</td>
<td>Smith</td>
<td><a href="mailto:test@email.com">test@email.com</a></td>
<td>00000000000000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Off</td>
<td>Decertify</td>
<td></td>
<td></td>
<td>Test</td>
<td>Doe</td>
<td><a href="mailto:test@email.com">test@email.com</a></td>
<td>00000000000000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 67: CAC Table and Submit Button**
4. On the Confirmation page select Print DF to print a copy of your information. Select Exit to return to the maintenance web form Welcome page.

5.3. Downloading Your Current CAC Roster

You can download an Excel file of your current CAC roster after you add your CAC(s). This is an optional step, but CMS recommends that you keep a copy of your CAC roster for your records.

Do not use the copy that you download for your records to make future updates. Make any updates to your roster through the maintenance web form using the manual process or by uploading a new CSV file.

Note: You cannot reuse your existing CAC Roster when making additions to your roster. You must use a clean version of the CAC Roster template when adding new CACs to your roster.

To download a copy of your CAC roster:

1. Log in to the maintenance web form.
2. In the Certified Application Counselors (CACs) table of the CDO Summary page select Download My Current CAC Roster.
Active CAC Roster

![Figure 69: CAC Download My Current CAC Roster Button](image)

3. Open your file from the lower left corner tab of your screen.

![Figure 70: CAC Roster CSV File Tab](image)

![Figure 71: CAC Roster Excel File](image)
4. Save your file to a location of your choice.

![Save As dialog box with file CacRoster (6) selected and CSV format selected]

Figure 72: File Location Save Button

5. Once you download your CAC roster, return to the maintenance web form in your browser to continue.
5.4. Decertifying CACs

During your two (2)-year agreement period as a CDO with CMS, you may have CACs who leave the organization.

When a CAC leaves your organization or remains with your organization but no longer assists consumers as a CAC for that plan year, you should decertify this person on the maintenance web form. Decertifying a CAC means, this person can no longer assist consumers as a CAC with your organization.

You can use the maintenance web form to document these changes by decertifying the CACs who leave your organization.

1. On the **CDO Summary** page, in the **CAC** table, identify the individual you want to decertify.
2. Select **Decertify**.

![Certified Application Counselors (CACs) Table]

<table>
<thead>
<tr>
<th>Action</th>
<th>Certification Status</th>
<th>Training Completion Date</th>
<th>Decertification Date</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
<th>Current CAC ID</th>
<th>Previous CAC ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decertify</td>
<td></td>
<td></td>
<td></td>
<td>Test</td>
<td>Evans</td>
<td><a href="mailto:testevans@email.com">testevans@email.com</a></td>
<td>CAC0123456789</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 73: Decertify Link**
Active CAC Roster

3. The system will confirm that you want to decertify the individual – select **OK**. Once you select OK, this action cannot be cancelled. You will need to add the CAC again following steps in the previous sections.

*Warning:* If you need to edit the individual’s first name or CAC ID, you need to return to the CDO Summary page and decertify the individual and add them again with a **different CAC ID**.

![Figure 74: Decertify Pop-up Window OK Button](image)

4. The system will update the **CAC** table on the **CDO Summary** page to list the decertification date and move the contact to the bottom of the table.

![Figure 75: CAC Roster Table](image)

*Note:* You cannot alter the Training Completion Date or the Decertification Date. When you decertify a CAC, the web form automatically populates the Decertification Date. When the CAC completes the annual training, the MLMS updates the Training Completion Date.
5. Confirm the information is correct, make additional changes if needed, and select **Submit**.

![Figure 76: Submit Button](image)

5.5. **Editing a CAC’s Information**

During your two (2)-year agreement period, a CAC’s information may change. For example, someone’s last name may change, or your organization may change names requiring new email addresses.

To edit a CAC’s contact information:

1. Navigate to the **CAC** table on the **CDO Summary** page and select **Edit**.

![Figure 77: CAC Edit Link](image)

**Note**: You cannot alter the Training Completion Date or the Decertification Date. When you decertify a CAC, the web form automatically populates the Decertification Date. When the CAC completes the annual training, the MLMS updates the Training Completion Date.
Active CAC Roster

2. On the **CAC Contact Edit Page**, you can edit the individual’s **Last Name** and/or **Email Address**. Once you make your changes, select **Save & Return**.

   ![Figure 78: CAC Contact Edit Fields and Save & Return Button]

   **Warning:** If you need to edit the individual’s first name or CAC ID, you need to return to the **CDO Summary** page and decertify the individual and add them again with a **different CAC ID**.

3. On the **CDO Summary** page, your edits will appear in the **CAC** table. Confirm your changes and select **Submit**. The **Confirmation** page will appear where you can download a copy of your submission and exit the maintenance web form.

   ![Figure 79: Submit Button]
6. Active CDO Renewal

CMS certifies CDOs on a specific timeframe, typically two (2)-years. To renew your CDO agreement, one of your leadership contacts (Organization Senior Official, CAC Project Director, and Secondary Contact, if applicable) should access the maintenance web form to update your organization’s information and submit a new signed and dated CMS-CDO agreement.

**Note:** Your leadership contacts will be able to renew starting thirty (30) calendar days prior to your organization’s expiration date. Your leadership contacts can renew any time during that thirty (30) day window but must renew the CMS-CDO agreement by your organization’s expiration date.

If you do not know your expiration date, you can email us at CACQuestions@cms.hhs.gov. You can also view your expiration date in the Agreement PDF table on the CDO Summary page of the maintenance web form.

![Figure 80: Expiration Date on the CDO Summary Page of the Maintenance Web Form](image)

**Agreement PDF**

<table>
<thead>
<tr>
<th>Action</th>
<th>File Name</th>
<th>Upload Date</th>
<th>CDO ID</th>
<th>Approval Date</th>
<th>Renewal Opens</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>02212021_CDO_Agreement_1.pdf</td>
<td>9/22/2021 12:52 PM</td>
<td>02212021</td>
<td>8/30/2021</td>
<td>6/1/2023</td>
<td>6/30/2023</td>
</tr>
</tbody>
</table>

You can access additional training materials, FAQs, and videos that describe how to complete renewing your CDO agreement on the [CDO Program web page](#). This includes:

- **CDO Organizational Maintenance Web Form FAQs** – contains frequently asked questions about the maintenance web form and CAC application process.
- **CDO Renewal Job Aid** – provides step-by-step instructions about adding and updating your organization’s information and submit a new signed and dated CMS-CDO agreement when required.
- **CDO Learning Series – CDO Renewal video** – discusses the process for renewing your CDO agreement with CMS.
- **CDO Organizational Maintenance Web Form Demonstration Videos – CDO Renewal video** – contains a step-by-step demonstration of renewing an organization's CDO agreement using the maintenance web form.

To review and update your organization’s information, refer to **Section 3**.

To replace your existing CMS-CDO agreement with new signed and dated agreement, refer to **Section 3.6**.
7. Next Steps

If CMS approves your CMS-CDO agreement, you will receive a Welcome Packet email that includes your CDO ID, counter signature page with your effective date, and important guidance for operating as a CDO.

During your two (2)-year agreement period, your organization needs to:

- Submit your signed CMS-CDO agreement.
- Maintain administrative data on CDO headquarter location, service locations, leadership contacts information, etc.
- Certify your CAC staff and maintain your CAC Roster per Section II, paragraphs 1 through 4 (Obligations and Conditions) of the CMS-CDO agreement.
- Monitor CAC Annual Certification data from the Marketplace Learning Management System (MLMS).
- Keep your CDO information current per Section II, paragraphs 5 and 6 (Obligations and Conditions) of the CMS-CDO agreement.
- Renew your signed CMS-CDO agreement.

7.1. Certifying CAC Staff and Maintaining CAC Roster

Per Section II, paragraphs 1 through 4 (Obligations and Conditions) of the CMS-CDO agreement, as authorized by 45 CFR 155.225, to certify your CACs, your organization must:

- Issue each CAC a unique ID.
- Ensure their completion of the annual training.
- Provide them with a CDO-CAC model agreement.

Your organization’s leadership contacts can then access the maintenance web form to upload and maintain your organization’s CAC roster.

7.2. Keeping Your CDO Information Current

Per Section II, paragraphs 5 and 6 (Obligations and Conditions) of the CMS-CDO agreement, to keep your CDO information current, your organization must update your CDO record if any of these changes occur:

- Organization name and/or address
- List of leadership contacts or CACs
- Service locations
- Enrollment assistance type (open enrollment only or year-round)
- Specialty areas

Your organization’s leadership contacts can access the maintenance web form to make these updates.
Next Steps

If you change your Organization Name, Organization Senior Official’s name, and/or your Operating State, the maintenance web form will prompt you to upload a new signed and dated CMS-CDO agreement.

7.3. Renewing Your CMS-CDO Agreement

Per Section IV.1 (Effective Date and Term) of the CMS-CDO agreement, existing CDOs complete a renewal application within the time frame communicated by CMS, typically two (2) years from your effective date by reviewing existing organization information and uploading a renewal agreement.

You can find your expiration date on the CDO Summary page of the maintenance web form, or you can email CACQuestions@cms.hhs.gov. **If you do not renew your CDO agreement with CMS before your expiration date, you will become inactive. If you become inactive, your organization will need to re-apply to the CDO Program during the open application season because your CDO ID will no longer be valid. Per Section V.3 (Consequences of Termination or Nonrenewal) of the CMS-CDO agreement, you must also inform your CACs to stop providing enrollment assistance once your organization becomes inactive.**

7.4. Withdrawing from the CDO Program

Per Section V (Termination) of the CMS-CDO agreement, as authorized by 45 CFR 155.225, if you are an approved CDO and want to withdraw:

1. Send a formal written request to CMS at CACQuestions@cms.hhs.gov. The written request should include your CDO ID and the date when your CMS-CDO agreement should terminate.
2. Notify your organization’s staff and volunteers that, as of the effective date of termination of its agreement with CMS, they cannot 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. Appropriately secure and retain for six (6) years consumer consent documents. Your organization’s duty to protect and maintain the privacy and security of personally identifiable information (PII) survives its withdrawal from the CDO 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 remove your organization’s listing(s) from Find Local Help.