

CERTIFIED APPLICATION  
COUNSELOR DESIGNATED  
ORGANIZATION

***CDO Organizational Maintenance  
Web Form User Guide***

May 15, 2020





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## Introduction

### 1. Introduction

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The CDO Organizational Maintenance Web Form, referred to as the maintenance web form, is the platform that certified application counselor designated organizations (CDOs) use to maintain information about their organization with the Centers for Medicare and Medicaid Services (CMS).

You will use the maintenance web form to:

- Submit, renew, or edit CMS-CDO agreements.
  - **New Applicants** complete the initial application process by uploading a signed CMS-CDO agreement after submitting your initial application using the CDO Application web form and receiving a preliminary approval.
  - **Existing CDOs** complete a renewal application every two years by reviewing existing organization information and uploading a renewal 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).

New applicants can access the maintenance web form only after receiving a preliminary approval email from CMS, upon approval of the CDO application you 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 unique 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.**



## Introduction

### 1.1. Helpful Resources & Tips Getting Started

Before you get started, reference this user guide to understand what information you need to complete 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 – CDO Data Management – discusses resources available to you as a CDO and how to maintain information with CMS during the two (2)-year agreement period.
- CAC Roster Job Aid – provides step-by-step instructions about adding and updating a CAC roster.
- CDO Organizational Maintenance Web Form Demonstration videos – 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 FAQs – provides frequently asked questions about the maintenance web form and CAC application process including the CAC roster.

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 agreement with CMS, visit the [CDO Learning Series – CDO Renewal video](#).

For a video that discusses the process for CDOs to add, update, and decertify 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](#).



#### 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.



# Welcome Page

## 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 Organizational Maintenance Web Form.

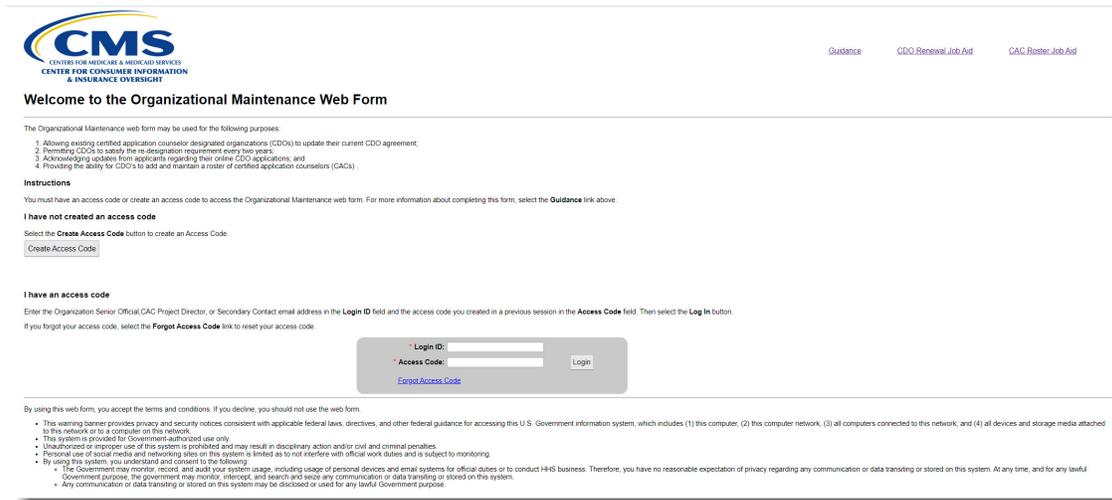


Figure 1: Welcome to the Organizational Maintenance Web Form Page

Upon your initial login, you must enter or create an access code 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

If	Then
You need to create an access code	<b>Refer to Section 2.1.</b>
You have an access code	<b>Refer to Section 2.2.</b>
You forgot your access code	<b>Refer to Section 2.3.</b>



## Welcome Page

### 2.1. Create Access Code

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:

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

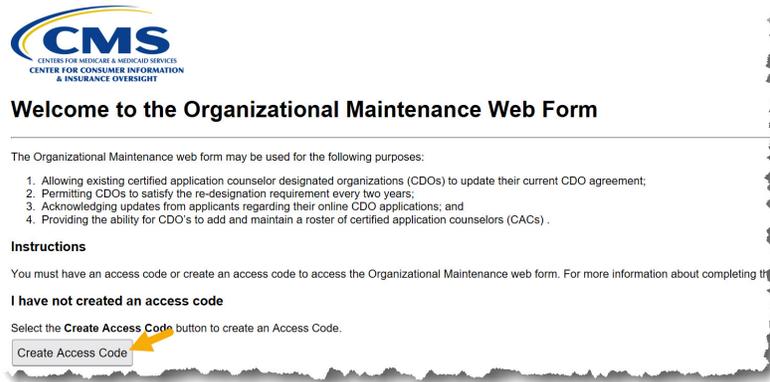


Figure 2: Create Access Code Button

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 into 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.

 **NOTE**

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



## Welcome Page

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



### Welcome to the Organizational Maintenance Web Form

The Organizational Maintenance web form may be used for the following purposes:

1. Allowing existing certified application counselor designated organizations (CDOs) to update their current CDO agreement;
2. Permitting CDOs to satisfy the re-designation requirement every two years;
3. Acknowledging updates from applicants regarding their online CDO applications; and
4. Providing the ability for CDO's to add and maintain a roster of certified application counselors (CACs) .

#### Instructions

You must have an access code or create an access code to access the Organizational Maintenance web form. For more information about completing th

#### I have not created an access code

Select the **Create Access Code** button to create an Access Code.

Create Access Code

Figure 3: Create Access Code Button

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

Continue

Figure 4: Access Code Confirmation Page Continue Button



## Welcome Page

### 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** the **Login** button.

#### Welcome to the Organizational Maintenance Web Form

The Organizational Maintenance web form may be used for the following purposes:

1. Allowing existing certified application counselor designated organizations (CDOs) to update their current CDO agreement;
2. Permitting CDOs to satisfy the re-designation requirement every two years;
3. Acknowledging updates from applicants regarding their online CDO applications; and
4. Providing the ability for CDO's to add and maintain a roster of certified application counselors (CACs) .

#### Instructions

You must have an access code or create an access code to access the Organizational Maintenance web form. For more information about

#### I have not created an access code

Select the **Create Access Code** button to create an Access Code.

Create Access Code

#### I have an access code

Enter the Organization Senior Official, CAC Project Director, or Secondary Contact email address in the **Login ID** field and the access code.

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

\* Login ID:

\* Access Code:

[Forgot Access Code](#)

Login

Figure 5: Welcome Page Login Button



## Welcome Page

### 2.3. Forgot Access Code

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

**Welcome to the Organizational Maintenance Web Form**

The Organizational Maintenance web form may be used for the following purposes:

1. Allowing existing certified application counselor designated organizations (CDOs) to update their current CDO agreement;
2. Permitting CDOs to satisfy the re-designation requirement every two years;
3. Acknowledging updates from applicants regarding their online CDO applications; and
4. Providing the ability for CDO's to add and maintain a roster of certified application counselors (CACs) .

**Instructions**

You must have an access code or create an access code to access the Organizational Maintenance web form. For more information about

**I have not created an access code**

Select the **Create Access Code** button to create an Access Code.

**I have an access code**

Enter the Organization Senior Official, CAC Project Director, or Secondary Contact email address in the **Login ID** field and the access code.

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

\* Login ID:

\* Access Code:

[Forgot Access Code](#)

Figure 6: Welcome Page Forgot Access Code Link

On the Forgot Access Code page:

1. **Enter** your **email address** on record.
2. **Select** the **Send PIN** button. 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, 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.

The red asterisk (\*) indicates required fields.

\* Organization Senior Official or CAC Project Director Email Address:

\* PIN:

Figure 7: Forgot Access Code Page Send PIN Button

Add [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov) to your trusted emails to ensure you receive all CMS notifications and check your spam/junk folders.



## Welcome Page

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.

### Welcome to the Organizational Maintenance Web Form

The Organizational Maintenance web form may be used for the following purposes:

1. Allowing existing certified application counselor designated organizations (CDOs) to update their current CDO agreement;
2. Permitting CDOs to satisfy the re-designation requirement every two years;
3. Acknowledging updates from applicants regarding their online CDO applications; and
4. Providing the ability for CDO's to add and maintain a roster of certified application counselors (CACs) .

#### Instructions

You must have an access code or create an access code to access the Organizational Maintenance web form. For more information

#### I have not created an access code

Select the **Create Access Code** button to create an Access Code.

Create Access Code

#### I have an access code

Enter the Organization Senior Official, CAC Project Director, or Secondary Contact email address in the **Login ID** field and the access code in the **Access Code** field. If you forgot your access code, select the **Forgot Access Code** link to reset your access code.

\* Login ID: pnavann@1und1.de  
\* Access Code:   
[Forgot Access Code](#)  
Login

Figure 8: Welcome Page Forgot Access Code Link

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

### Forgot Access Code

#### Instructions

Enter the Organization Senior Official, 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.

The red asterisk (\*) indicates required fields.

\* Organization Senior Official or CAC Project Director Email Address: pnavann@1und1.de  
Send PIN  
\* PIN: 016540  
Back Continue

Figure 9: Forgot Access Code Window



## Welcome Page

On the Reset Access Code page:

1. **Create** and **enter** a new **access code**.
2. **Confirm** your **new access code** by entering it again.
3. **Select** the **security questions** and **enter** the **corresponding responses** to each.
4. **Select** the **Continue** button to proceed.

 **NOTE**

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

**Reset Access Code**

The red asterisk (\*) indicates required fields.

**Reset Access Code**

**Access Code Requirements:**

- ✓ At least eight (8) characters but no more than 12 characters
- ✓ At least one (1) capital letter
- ✓ At least one (1) lower-case letter
- ✓ At least one (1) number
- ✓ Cannot begin with a number
- ✓ Access Codes must match

\* **New Access Code:**

\* **Confirm Access Code:**

**Security Questions**

**Security Question 1:** What is your favorite color?  
→ \* **Security Question 1 Answer:**

**Security Question 2:** What year did you graduate from high school?  
→ \* **Security Question 2 Answer:**

Figure 10: Reset Access Code Window

5. On the Access Code Reset Confirmation page, **select** the **Continue** button. The maintenance web form will return you to the login page.

## Access Code Reset Confirmation

You successfully reset your access code. Select the **Continue** button to log into the Organizational Maintenance web form.

Figure 11: Access Code Reset Confirmation Message

Refer to **Table 1** to proceed through the login process.



## CDO Summary Page

### 3. CDO Summary Page

The CDO Summary Page allows you to review and/or edit your organization’s information, update the CAC Rosters and upload your signed agreement.

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

The maintenance web form will prompt you to review your information before uploading a new CMS-CDO agreement.

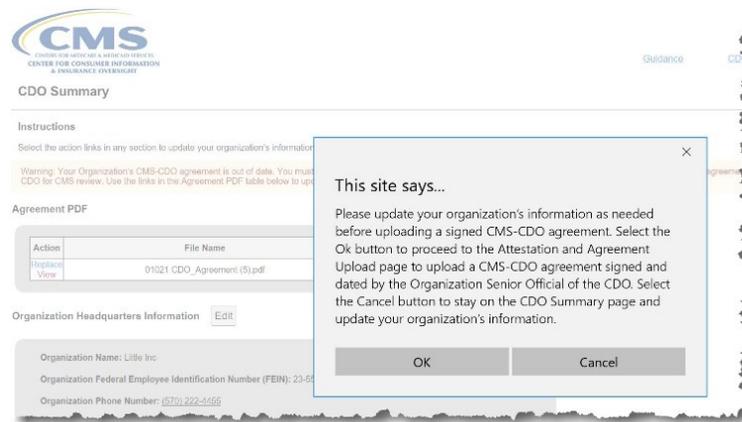


Figure 12: CMS-CDO Agreement Prompt

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 organization name, Organization Senior Official’s name and title, service location states, and organization PDF address.
- Your CMS-CDO agreement expired.

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

If	Then
You want to generate a new copy of the agreement	<b>Refer to Section 3.1.</b>
You want to review and/or edit your organization’s headquarters information	<b>Refer to Section 3.2.</b>
You want to review and/or edit your organization’s service locations	<b>Refer to Section 3.3.</b>
You want to review and/or edit your organization’s additional details	<b>Refer to Section 3.4.</b>
You want to edit or replace the contact information for one or more of your organization’s contacts	<b>Refer to Section 3.5.</b>
You want to view and/or replace your CMS-CDO signed agreement	<b>Refer to Section 3.6.</b>

### 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** the **Add** link to upload your signed CMS-CDO agreement.

Agreement PDF

Action	File Name	Upload Date	Approval Date	Expiration Date
<a href="#">Add</a>	Agreement form has not been uploaded.			

Figure 13: Agreement PDF Table Add Link

#### 3.1.2. Print PDF Agreement

To download a copy of your pre-populated CMS-CDO agreement, **select** the **Print PDF Agreement** button.

Attestation and Agreement Upload

**Instructions**

Prior to completing 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 Senior Official, listed on your application, can sign the CMS-CDO agreement.

The red asterisk (\*) indicates required fields.

[Print PDF Agreement](#)

Figure 14: Attestation and Agreement Upload

Refer to **Section 3.6** to replace your newly generated agreement.



## CDO Summary Page

### 3.1.3. 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** the **Choose File** button under the Upload a File section. The maintenance web form displays a pop- up window.
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, **select** the **file**, and **select** the **OK** button. The maintenance web form will return you to the Attestation and Agreement Upload page.

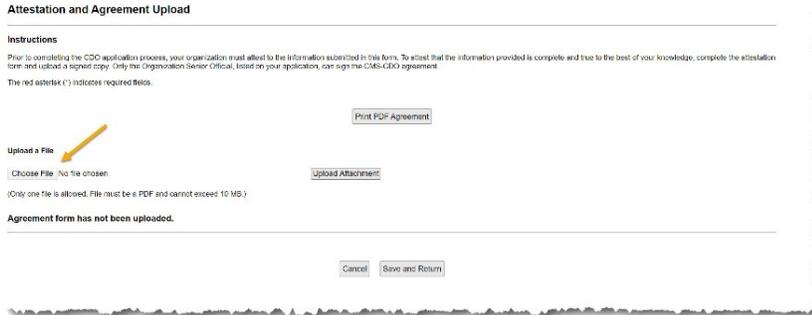


Figure 15: Attestation and Agreement Upload Page Choose File Button

3. **Select** the **Upload Attachment** button.

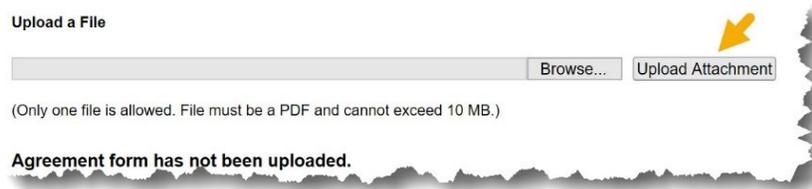


Figure 16: Upload Attachment Button



## CDO Summary Page

- In the Attachment Summary table, **select** the **View** link to open your file. If the agreement did not upload, the maintenance web form will display a warning message.

Agreement PDF

Action	File Name	Upload Date
<a href="#">View</a>	01015 CDO_Agreement (1).pdf	3/17/2020 11:00 AM

Figure 17: Attestation and Agreement Upload Page View Link

- Select** the **Save and Return** button to return to the CDO Summary page.



Figure 18: Save and Return Button

- On the CDO Summary page, **select** the **Submit** button to submit your CMS-CDO agreement.



Figure 19: CDO Summary Page Submit Button

**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.

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

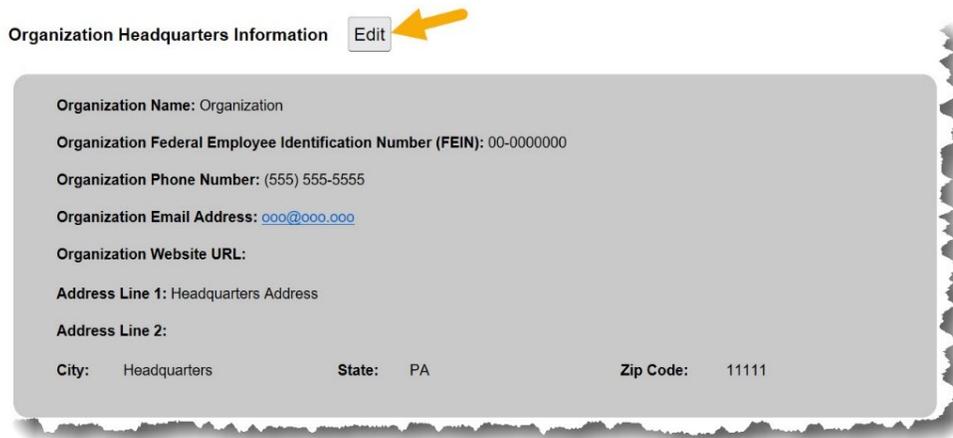


Figure 20: Edit Organization Headquarters Information Page Edit Link

2. On the Edit Organization Headquarters Information page, update your information as needed in the following fields:
  - **Name**
  - **Federal Employee Identification Number (FEIN) (if applicable)**
  - **Phone Number**
  - **Email Address**
  - **Website URL (if applicable)**
  - **Street Address**
  - **City**
  - **State**
  - **Zip Code**



## CDO Summary Page

3. **Select** the **Save and Return** button to save your updates. The maintenance web form will return you to the CDO Summary page.

### Edit Organization Headquarters Information

#### Instructions

Edit the fields below to provide updated information about the organization applying to be a CDO. All fields are pre-populated with the most recent information.  
The red asterisk (\*) indicates required fields.

#### Organization Information

* Organization Name:	<input type="text" value="Organization"/>
Organization Federal Employee Identification Number (FEIN):	<input type="text" value="00-0000000"/>
* Organization Phone Number:	<input type="text" value="(555) 555-5555"/>
* Organization Email Address:	<input type="text" value="000@000.000"/>
Organization Website URL:	<input type="text"/>

#### Organization Headquarters Address

* Address Line 1:	<input type="text" value="Headquarters Address"/>		
Address Line 2:	<input type="text"/>		
* City:	<input type="text" value="Headquarters"/>	* State:	<input type="text" value="PA"/>
* Zip Code:	<input type="text" value="11111"/>		

Figure 21: Edit Organization Headquarters Information Save & Return Button

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



### WARNING

If you change your organization's name, when you select the Save and Return button 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** for instructions on how to generate and upload your updated CMS-CDO agreement.

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



## CDO Summary Page

### 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** the **Edit** link to edit your service locations. The maintenance web form navigates to the Edit Service Locations page.

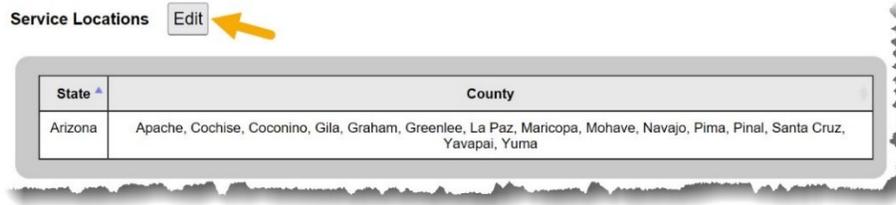


Figure 22: Edit Service Locations Button

2. On the Edit 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.

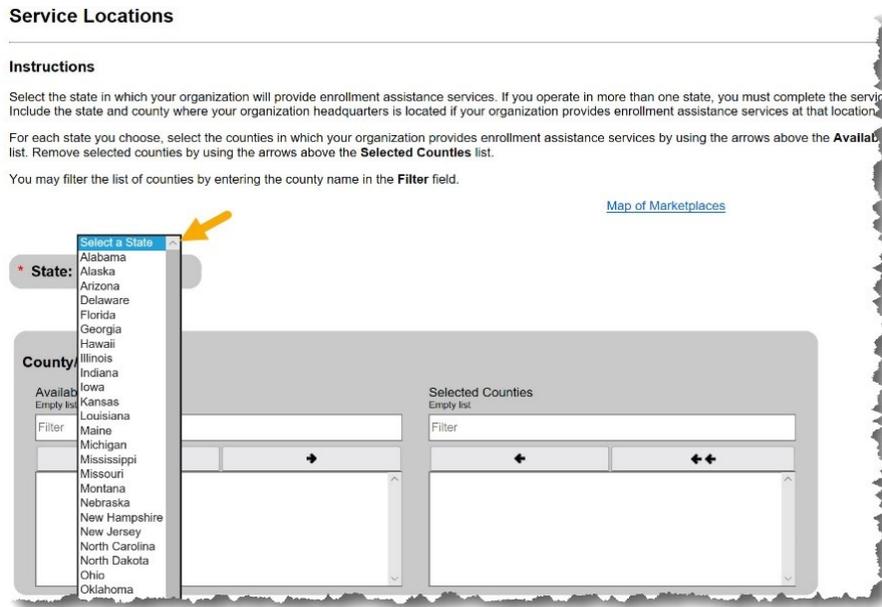


Figure 23: Edit Service Locations Page State List

3. **Select** the **county or counties** in which your organization will provide enrollment assistance services.



## CDO Summary Page

4. **Move** the **applicable counties** to the Selected Counties list by using the arrows above the Available Counties. You may filter the list of counties by entering the county name in the Filter field.

The screenshot shows the 'County/Parish' section with a dropdown menu set to 'Delaware'. Below it are two columns: 'Available Counties' (Showing all 3) and 'Selected Counties' (Empty list). The 'Available Counties' column has a 'Filter' field and a list containing 'Kent', 'New Castle', and 'Sussex'. A yellow box highlights these three counties. Above the list are two arrows: a double arrow pointing right and a single arrow pointing right. A yellow arrow points to the double arrow. The 'Selected Counties' column has a 'Filter' field and is currently empty. Above its list are two arrows: a single arrow pointing left and a double arrow pointing left. A yellow arrow points to the single arrow.

Figure 24: Edit Service Locations Page Available and Selected Counties List

5. To remove a county or state, select the state and **move** the **list of counties** from the Selected Counties column to the Available Counties column.

The screenshot shows the 'County/Parish' section with a dropdown menu set to 'Delaware'. Below it are two columns: 'Available Counties' (Empty list) and 'Selected Counties' (Showing all 3). The 'Available Counties' column has a 'Filter' field and is currently empty. Above its list are two arrows: a double arrow pointing right and a single arrow pointing right. The 'Selected Counties' column has a 'Filter' field and a list containing 'Kent', 'New Castle', and 'Sussex'. A yellow box highlights these three counties. Above the list are two arrows: a single arrow pointing left and a double arrow pointing left. A yellow arrow points to the single arrow.

Figure 25: Edit Service Locations Page Available and Selected Counties List

6. **Select** the **Update Table** button. The Service Locations table will include all service locations for the organization that you selected.



## CDO Summary Page

County/Parish:

Available Counties  
Showing all 2

Selected Counties  
Showing all 1

Filter

Filter

Kent  
Sussex

New Castle

Update Table

Figure 26: Edit Service Locations Page Update Table Button

- Repeat **steps 2 to 6** for each state in which your organization will provide enrollment assistance services.
- Select the *Save and Return*** button to save your updates. The maintenance web form will return you to the CDO Summary page.

County/Parish:

Available Counties  
Showing all 2

Selected Counties  
Showing all 1

Filter

Filter

Kent  
Sussex

New Castle

Update Table

Service Locations

State	County
Arizona	Apache, Cochise, Coconino, Gila, Graham, Greenlee, La Paz, Maricopa, Mohave, Navajo, Pima, Pinal, Santa Cruz, Yavapai, Yuma
Delaware	New Castle

Cancel Save & Return

Figure 27: Edit Service Locations Page Save and Return Button



## CDO Summary Page



### WARNING

If you change your state information, when you select the Save and Return button 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** 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 Details Section

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

1. In the Additional Organization Details section of the CDO Summary page, **select** the **Edit** link to edit your additional organization information. The maintenance web form navigates to the Edit Additional Organization Details page.

Additional Organization Information

Edit

Organization Type: Health Services

Organization Subspecialties:

What is your intended enrollment assistance type? Year-round

Does your organization currently:

Have processes in place to handle and protect Personally Identifiable Information (PII)? Yes

Screen the staff and volunteers it will certify as application counselors? Yes

Have processes in place to assist people with health coverage decisions? Yes

Figure 28: Additional Organization Information Edit Button

2. On the **Edit Additional Organization Details** page, **update** your information as needed in the following fields:
  - Primary Organization Type
  - Organization Specialty
  - Enrollment Assistance type



## CDO Summary Page

3. **Select** the **Save and Return** button to save your updates. The maintenance web form will return you to the CDO Summary page.

### Edit Additional Organization Details

#### Instructions

Answer the following about your organization:  
The red asterisk (\*) indicates required fields.

\* **What is your Primary Organization Type?**

Health Services *Select all that apply.*

- Hospital/Health System
- Pharmacy
- Federally Qualified Health Center/Community Health Center
- Primary Care Association
- Medical Practice

Social Services

- Government Agency (city, state, local, federal, etc.)
- Health Plan Issuer
- Agent/Broker
- Other

**Organization Specialty (optional)** *Select all that apply.*

- Tribal
- Faith-based
- Behavioral/Mental health
- HIV/AIDS
- Other

\* **What is your intended enrollment assistance type?**

- Year-round
- Open Enrollment only

**Does your organization currently:**

\* **Have processes in place to handle and protect Personally Identifiable Information (PII)?**

- Yes
- No

\* **Screen the staff and volunteers it will certify as application counselors?**

- Yes
- No

\* **Have processes in place to assist people with health coverage decisions?**

- Yes
- No

Cancel Save & Return

Figure 29: Edit Additional Organization Details Page Save & Return Button

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



## CDO Summary Page

### 3.5. Contact Information Table

The Contact Information table allows you to review and/or edit information for your organization’s contacts. Each organization is required to have an Organization Senior Official and a CDO Project Director. You may designate a third contact, referred to as the secondary contact, but is not required. **Table 3** provides guidance about how to add or edit a contact and how to delete an optional secondary contact.

Table 3: Contact Information Options

If	Then
You want to edit a contact. (e.g., an existing contact’s last name changed or their email address or phone number changed)	<ol style="list-style-type: none"> <li>1. <b>Select</b> the <b>Edit</b> link beneath the title of the contact (refer to <b>Figure 30</b>). The maintenance web form will take you to the Edit Contact Information page. The role you selected appears and all of the fields prepopulate with the Organization Contact Information on record.</li> <li>2. Update your information as needed in the following fields: <ul style="list-style-type: none"> <li>• <b>First Name</b></li> <li>• <b>Last Name</b></li> <li>• <b>Email Address</b></li> <li>• <b>Job Title</b></li> <li>• <b>Phone Number</b></li> <li>• <b>Phone Extension</b> (if applicable)</li> </ul> </li> <li>3. <b>Select</b> the <b>Save and Return</b> button to save your updates (refer to <b>Figure 31</b>). The maintenance web form will return you to the CDO Summary page.</li> </ol>
You want to replace a contact. (e.g., an existing contact left the organization and someone else is taking their place)	<ol style="list-style-type: none"> <li>1. <b>Select</b> the <b>Replace</b> link beneath the title of the contact (refer to <b>Figure 32</b>). The maintenance web form will take you to the Replace Contact Information page and the role you selected appears.</li> <li>2. Update your information as needed in the following fields: <ul style="list-style-type: none"> <li>• <b>First Name</b></li> <li>• <b>Last Name</b></li> <li>• <b>Email Address</b></li> <li>• <b>Job Title</b></li> <li>• <b>Phone Number</b></li> <li>• <b>Phone Extension</b> (if applicable)</li> </ul> </li> <li>3. <b>Select</b> the <b>Save and Return</b> button to save your updates (refer to <b>Figure 33</b>). The maintenance web form will return you to the CDO Summary page.</li> </ol>



## CDO Summary Page

If	Then
Once approved, you want to add a Secondary Contact	<ol style="list-style-type: none"> <li>1. <b>Select</b> the <b>Add Secondary Contact</b> (refer to <b>Figure 34</b>).</li> <li>2. <b>Enter</b> the <b>Secondary Contact</b> information as needed in the following fields: <ul style="list-style-type: none"> <li>• <b>First Name</b></li> <li>• <b>Last Name</b></li> <li>• <b>Email Address</b></li> <li>• <b>Job Title</b></li> <li>• <b>Phone Number</b></li> <li>• <b>Phone Extension (if applicable)</b></li> </ul> </li> <li>3. <b>Select</b> the <b>Save and Return</b> button to save your updates (refer to <b>Figure 35</b>). The maintenance web form will return you to the CDO Summary page.</li> </ol>
You want to delete a secondary contact	<ol style="list-style-type: none"> <li>1. <b>Select</b> the <b>Delete</b> link beneath the title of the contact (refer to <b>Figure 36</b>).</li> <li>2. <b>Select OK</b> in the pop-up window (refer to <b>Figure 37</b>).</li> <li>3. The CDO Summary page will re-refresh and will no longer list anything in the secondary contact information section (refer to <b>Figure 38</b>).</li> </ol>

### Contact Information

**Organization Senior Official Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit Replace</a>	Senior	Official	sss@sss.sss

**CAC Project Director Contact Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit Replace</a>	Project	Director	ppp@ppp.ppp

**Secondary Contact Information**

[Add Secondary Contact](#)

Figure 30: Contact Information Edit Link



## CDO Summary Page

### Edit Contact Information

#### Instructions

To add a contact, complete the contact information fields below. Select the **Save and Return** button to save the contact information.

The red asterisk (\*) indicates required fields.

#### Current Organization Senior Official

* First Name:	<input type="text" value="Senior"/>	* Last Name:	<input type="text" value="Official"/>
* Email Address:	<input type="text" value="sss@sss.sss"/>	* Job Title:	<input type="text" value="Vice President"/>
* Phone Number:	<input type="text" value="(555) 555-5555"/>	Phone Extension:	<input type="text"/>

Figure 31: Edit Contact Information Save & Return Button

#### Contact Information

**Organization Senior Official Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit Replace</a>	Senior	Official	sss@sss.sss

**CAC Project Director Contact Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit Replace</a>	Project	Director	ppp@ppp.ppp

**Secondary Contact Information**

[Add Secondary Contact](#)

Figure 32: Replace Contact Information Link



## CDO Summary Page

### Replace Contact Information

#### Instructions

To add a contact, complete the contact information fields below. Select the **Save and Return** button to save the contact information.

The red asterisk (\*) indicates required fields.

#### Current CAC Project Director

* First Name:	<input type="text"/>	* Last Name:	<input type="text"/>
* Email Address:	<input type="text"/>	* Job Title:	<input type="text"/>
* Phone Number:	<input type="text"/>	Phone Extension:	<input type="text"/>

Figure 33: Replace Contact Information Save & Return Button

#### Contact Information

**Organization Senior Official Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	Senior	Official	sss@sss.sss

**CAC Project Director Contact Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	Project	Director	ppp@ppp.ppp

**Secondary Contact Information**

[Add Secondary Contact](#)

Figure 34: Add Secondary Contact Link



# CDO Summary Page

## Secondary Contact Information

### Instructions

To add a Secondary contact, complete the contact information fields below. Select the **Save and Return** button to save the contact information.

The red asterisk (\*) indicates required fields.

* First Name:	<input type="text" value="Secondary"/>	* Last Name:	<input type="text" value="Contact"/>
* Email Address:	<input type="text" value="sec@sec.sec"/>	* Job Title:	<input type="text" value="Manager"/>
* Phone Number:	<input type="text" value="(555) 570-5555"/>	Phone Extension:	<input type="text"/>

Figure 35: Secondary Contact Information Save & Return Button

### Contact Information

Organization Senior Official Information			
Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	Senior	Official	sss@sss.sss
CAC Project Director Contact Information			
Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	Project	Director	ppp@ppp.ppp
Secondary Contact Information			
Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a> <a href="#">Delete</a>	Secondary	Contact	sec@sec.sec

Figure 36: Secondary Contact Delete Link



## CDO Summary Page

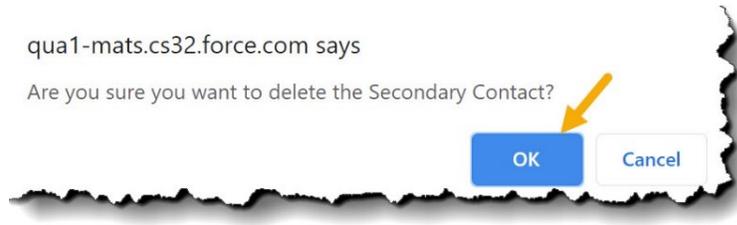


Figure 37: OK Button on Pop-Up Window

### Contact Information

**Organization Senior Official Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	Senior	Official	sss@sss.sss

**CAC Project Director Contact Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	Project	Director	ppp@ppp.ppp

**Secondary Contact Information**

[Add Secondary Contact](#)

Figure 38: Contact Information Display without Secondary Contact Information



### WARNING

If you change your Organization Senior Official contact, when you select the Save and Return button 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** for instructions on how to generate and upload your updated CMS-CDO agreement.

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



## CDO Summary Page

### 3.6. Replace Agreement

If you made changes to your organization’s information 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. **Select** the **Replace** link in the Agreement PDF table.

Agreement PDF

Action	File Name	Upload Date
<a href="#">Replace</a> <a href="#">View</a>	01022 CDO_Agreement (4).pdf	3/17/2020 11:11 AM

Figure 39: Agreement PDF Table Replace Link

2. A pop-up will appear asking if you need to make any changes to your information before you proceed to uploading an agreement. Note: while an agreement is under review, your record will lock and you will not be able to make any changes until you receive a determination from CMS. **Select** the **OK** button to proceed to upload your agreement. **Select** the **Cancel** button to stay on the CDO Summary page and change your information or add your CAC roster as needed.

qua1-mats.cs32.force.com says

Are you sure you want to delete the Secondary Contact?

Figure 40: Warning Message for Agreement Replace Link



## CDO Summary Page

3. **Select the *Print PDF Agreement* button.** The maintenance web form opens a new window in your internet browser that displays your updated CMS-CDO agreement.

### Attestation and Agreement Upload

#### Instructions

Prior to completing 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 Senior Official, listed on your application, can sign the CMS-CDO agreement.

The red asterisk (\*) indicates required fields.



Figure 41: Print PDF Agreement Button

4. 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 4** for instructions for each option.

Table 4: Options for Uploading Up-to-Date Agreement

If	Then
You want to remain in the maintenance web form to upload your up-to-date agreement.	<ol style="list-style-type: none"> <li>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.</li> <li>2. Refer to <b>Section 3.1.3</b> 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.</li> </ol>
You want to return to the maintenance web form to upload your up-to-date agreement	<ol style="list-style-type: none"> <li>1. On the Attestation and Upload page, <b>select</b> the <b>Cancel</b> button (refer to <b>Figure 42</b>).</li> <li>2. On the CDO Summary page, <b>select</b> the <b>Exit</b> button (refer to <b>Figure 43</b>).</li> <li>3. Outside of the maintenance web form, obtain your Organization Senior Official’s signature on the updated CMS-CDO agreement.</li> <li>4. Return to the maintenance web form and refer to <b>Section 3.1.3</b> 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.</li> </ol>



# CDO Summary Page

**Attestation and Agreement Upload**

---

**Instructions**

Prior to completing 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 Senior Official, listed on your application, can sign the CMS-CDO agreement.

The red asterisk (\*) indicates required fields.

**Upload a File**

No file chosen

(Only one file is allowed. File must be a PDF and cannot exceed 10 MB.)

Agreement form has not been uploaded.

Figure 42: Attestation and Agreement Upload Page Cancel Button

**Contact Information**

**Organization Senior Official Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	Senior	Official	sss@sss.sss

**CAC Project Director Contact Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	Project	Director	ppp@ppp.ppp

**Secondary Contact Information**

[Add Secondary Contact](#)

**Certified Application Counselors (CACs)**

Action	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
There are no CAC Contacts for this organization.							

Figure 43: CDO Summary Page Exit Button



## Confirmation Page

### 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 the PDF button** to generate a PDF confirmation.

#### 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 formal a confirmation of your submission. If you have any questions, contact [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov). Ensure you add the CMS Services address [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov) to your contacts and spam filters so you do not miss any responses.

Submission End Time: 3/20/2020 11:49 AM

An acknowledgment email has been sent to the following contacts:

pnavann@1und1.de  
twhiltono@deliciousdays.com

#### Print/Save

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

PDF Exit

Figure 44: Confirmation Page PDF Button

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

#### 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 formal a confirmation of your submission. If you have any questions, contact [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov). Ensure you add the CMS Services address [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov) to your contacts and spam filters so you do not miss any responses.

Submission End Time: 3/20/2020 11:49 AM

An acknowledgment email has been sent to the following contacts:

pnavann@1und1.de  
twhiltono@deliciousdays.com

#### Print/Save

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

PDF Exit

Figure 45: Confirmation Page Exit Button



## Active CDO CAC Roster

### 5. Active CDO CAC Roster

---

For plan year 2021 and beyond, CMS requires that CDOs now add a roster of their active CACs using new functionality on the [maintenance web form](#).

This added functionality is a required component to your CDO record with CMS during your two (2)-year agreement period. This new 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 – discusses the process for CDOs to add, update, and decertify CACs for the CAC roster.
- CAC Roster Job Aid – provides step-by-step instructions about adding and updating a 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 web page.

As an active CDO, you must assign unique IDs to each of your CACs and track 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 unique 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.



## Active CDO CAC Roster

### 5.1. Preparing for the CAC Roster

To prepare to upload your CAC roster:

1. Make sure your unique 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](#).
3. Gather all of the necessary CAC data and have it readily available to complete all of the information for the roster:
  - **First Name**
  - **Last Name**
  - **Email Address**
  - **Current CAC ID** — e.g., USCDOZ0012345, a maximum of 13 characters in length
  - **Previous CAC ID** — if applicable

### 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 with this method).
2. Using a CMS provided template to collect information for many CACs at once and upload it to 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 – discusses the process for CDOs to add, update, and decertify CACs for the CAC roster.
- CDO Organizational Maintenance Web Form Demonstration Videos – 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.

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 CDO CAC Roster

To add your roster of CACs:

1. **Select** the **Add CAC Roster** button.



Figure 46: Add CAC Roster Button

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



Figure 47: CAC Roster Upload Page



### NOTE

You can manually add up to five CACs 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 must use it if you have more than five CACs.



# Active CDO CAC Roster

## 5.2.1. Manual Process

To begin the manual upload process:

1. Select the No button. Once you select the No button on the CAC Roster Upload page, the CAC Roster Manual Upload section will appear.

**! 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.

Will you be using the CAC Roster template?

Yes

No

Figure 48: CAC Roster Template No Button

2. Enter the information indicated by a red asterisk.
  - **First Name**
  - **Last Name**
  - **Email Address**
  - **Current CAC ID**
  - **Previous CAC ID** — enter a previous CAC ID only if applicable. This is an optional field.
3. **Select** the **Save** button if only adding one CAC and the **Save and New** button if adding multiple CACs.
4. The CAC Roster Summary table will appear displaying the information you just entered. Review the information carefully, and **select** the **Save and Return** button.

CAC Roster Summary Table

Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
		Cac	One	cac@cac.one	PACDOA0100001	
		Cac	Two	cac@cac.two	PACDOA0100002	

Cancel Save and Return

Figure 49: CAC Roster Summary Table Save and Return Button



# Active CDO CAC Roster

**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.

- The CDO Summary page will appear. Your CAC Roster table will now display the CAC(s) you added. To submit your roster, **select** the **Submit** button.

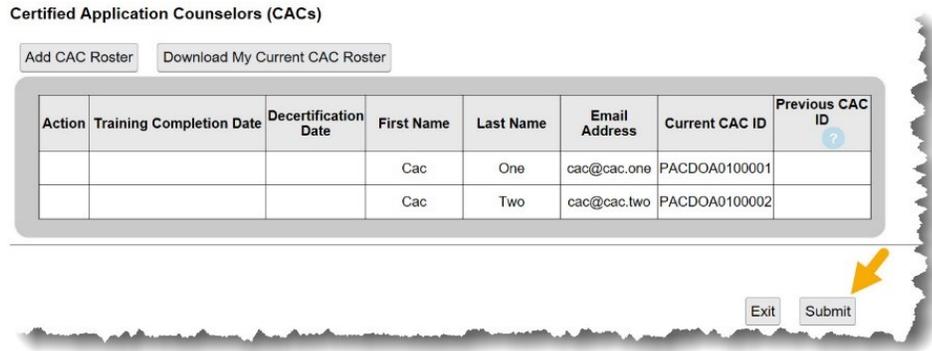


Figure 50: CAC Roster Submit Button

- The Confirmation page will appear. You can **select** the **PDF** button to print a copy of your information



## Active CDO CAC Roster

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

### 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 formal a confirmation of your submission. If you have any questions, contact [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov)

Ensure you add the CMS Services address [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov) to your contacts and spam filters so you do not miss any responses.

Submission End Time: 3/20/2020 9:40 AM

An acknowledgment email has been sent to the following contacts:

dvalentinetti5@friendfeed.com  
amy.capece@csra.com

#### Print/Save

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



Figure 51: Confirmation Page PDF and Exit Buttons

### 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.

Best Practices for using the template:

- For a step-by-step demonstration of how to add and update a CAC roster using the maintenance web form, access the CDO Organizational Maintenance Web Form Demonstration Videos – CAC Roster video on the [CDO Program web page](#).
- For step-by-step instructions about adding and updating a CAC roster, review the CAC Roster Job Aid on the [maintenance web form](#).
- Follow all of the instructions on the initial Instructions Tab and the CAC Roster tab.
- Make sure to select the Enable Content button 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.



# Active CDO CAC 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 the *CAC Roster Template* link.** The CAC Roster template will open on the instructions page. Review the instructions before you continue.

Select the link to download a CAC Roster template to create your .csv file.

[CAC Roster Template](#)

Figure 52: CAC Roster Template Link

2. **Select the *Enable Editing* button.**



Figure 53: Enable Editing Button

3. **Select the *Enable Content* button.**

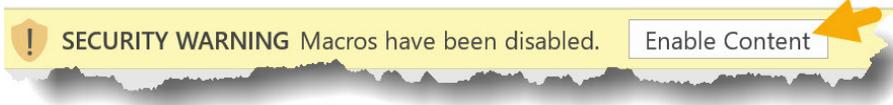


Figure 54: Enable Content Button

4. Review the information on the Instructions tab.

Certified Application Counselors (CAC) Roster Template	
<b>Overview:</b> The purpose of the Certified Application Counselor (CAC) Roster Template is to provide certified application counselor designated organizations (CDOs) a streamlined way to import their certified application counselor (CAC) information.	
<b>Workbook Tab Overview:</b>	
<b>Instructions Tab</b> - Contains instructions and completion guidance.	
<b>CAC Roster Tab</b> - Provides a template for CDOs to collect CAC information and generate a CSV file for upload to the CDO Organizational Maintenance web form. <b>You must select the Enable Editing button and then select the Enable Content button at the top of this template to proceed. Also, adding the users one by one yields the best results. If you are copying and pasting from another spreadsheet, please check every entry for extra spaces and remove them before creating the CSV file.</b>	
Column Heading	Content Description
First Name*	Enter the first name of the CAC. This is a required field.
Last Name*	Enter the last name of the CAC. This is a required field.
Email Address*	Enter the email address of the CAC. This is a required field.
Current CAC ID*	Enter the CAC's current ID (e.g., USCDO20012345), a maximum of 13 characters in length. This is a required field.
Previous CAC ID	Enter the CAC's previous ID (if applicable).

Figure 55: CAC Roster Template Instructions Tab



# Active CDO CAC Roster

5. **Select** the **CAC Roster** tab.



Figure 56: CAC Roster Template CAC Roster Tab

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

10		First Name*	Last Name*	Email Address*	Current CAC ID*	Previous CAC ID
11	Delete	CAC	Three	cac@tri.cac	PACDOA0100003	OPTIONAL
12						

Figure 57: CAC Information Fields

7. **Select** the **Add Certified Application Counselor** button to add your next CAC

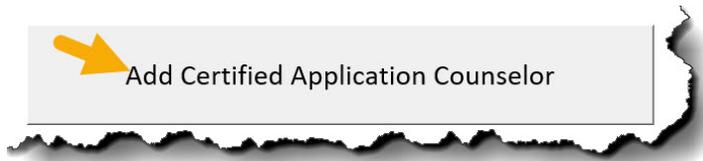


Figure 58: Add Certified Application Counselor Button

**NOTE**

If you have multiple CACs to add, you can select this button as many times as necessary. You can copy and paste CAC information from another document into the cells.

8. When you are finished adding your CACs, **select** the **Create CAC Roster CSV File** button



Figure 59: Create CAC Roster CSV File Button



## Active CDO CAC Roster

9. **Select** the **OK** button.

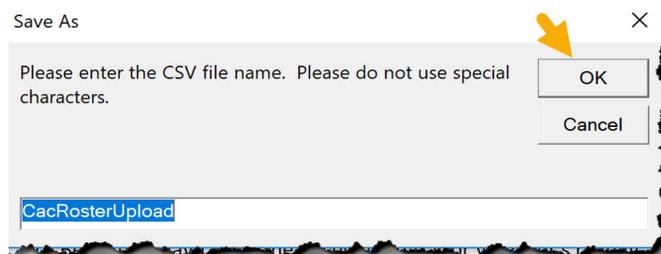


Figure 60: Save As Window OK Button

10. **Select** the location where to save the file and **select** the **OK** button.

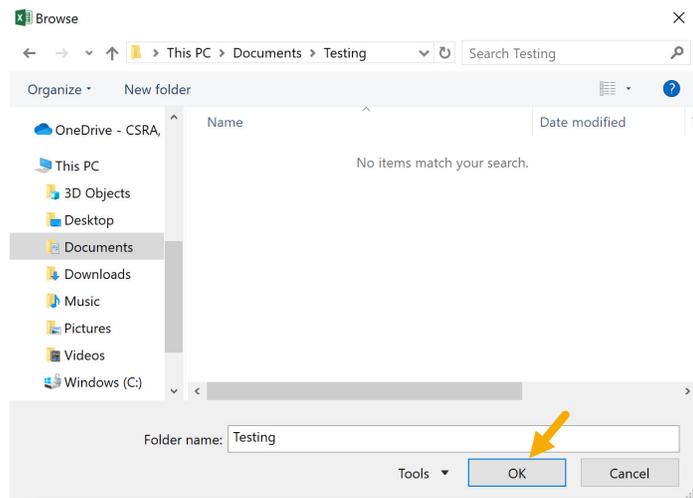


Figure 61: Location Saving OK Button

11. A pop-up will appear confirming that the CAC roster template saved. **Select** the **OK** button.

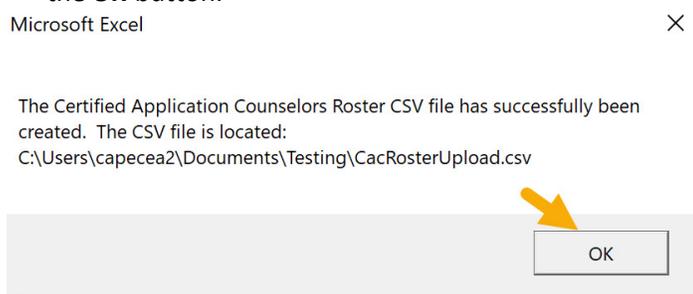


Figure 62: Location Save Pop-up Window OK Button

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



## Active CDO CAC Roster

On the CAC Roster Upload page:

1. **Select** the **Yes** button indicating that you want to upload your roster template.



Figure 63: CAC Roster Template Yes Button

2. In the CAC Roster Template Upload section, **select** the **Choose File** button.
3. **Navigate** to the location of your template and **select** that file.
4. Back on the maintenance web form, **select** the **Upload Attachment** button.

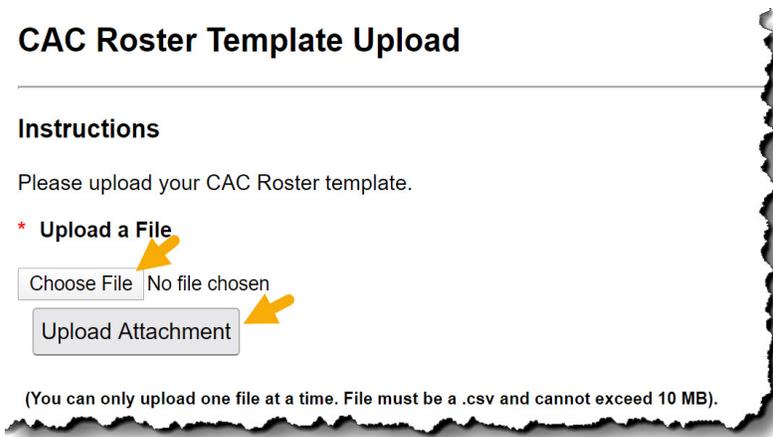


Figure 64: CAC Roster Template Upload Attachment Button



## Active CDO CAC Roster

- Your attachment summary will appear along with the CAC Roster Summary table **select** the **Save and Return** button.

Action	File Name	File Size
<a href="#">View</a>	CacRosterUpload.csv	0.0000 MB

### CAC Roster Summary Table

Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
		Cac	One	cac@cac.one	PACDOA0100001	
		Cac	Two	cac@cac.two	PACDOA0100002	
		Cac	Three	cac@tri.cac	PACDOA0100003	

Cancel Save and Return

Figure 65: CAC Roster Save and Return Button

- The CDO Summary page will appear and your CAC Roster table will now display the CAC you added – to submit your roster, **select** the **Submit** button

### Certified Application Counselors (CACs)

Add CAC Roster Download My Current CAC Roster

Action	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
			Cac	One	cac@cac.one	PACDOA0100001	
			Cac	Two	cac@cac.two	PACDOA0100002	
			Cac	Three	cac@tri.cac	PACDOA0100003	

Exit Submit

Figure 66: Add CAC Roster Submit Button

- The Confirmation page will appear – **select** the **PDF** button to print a copy of your information.



## Active CDO CAC Roster

8. **Select** the **Exit** button to return to the maintenance web form welcome page.

### 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 formal a 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.

Submission End Time: 3/23/2020 2:07 PM

An acknowledgment email has been sent to the following contacts:

dvalentinetti5@friendfeed.com  
amy.capece@csra.com

#### Print/Save

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



Figure 67: Confirmation Page PDF Button



## Active CDO CAC Roster

### 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.

To download a copy of your CAC roster:

1. **Log in** to the maintenance web form.
2. **Scroll** to the **Certified Application Counselors (CACs)** section of the **CDO Summary page**.
3. **Select** the **Download My Current CAC Roster** button.

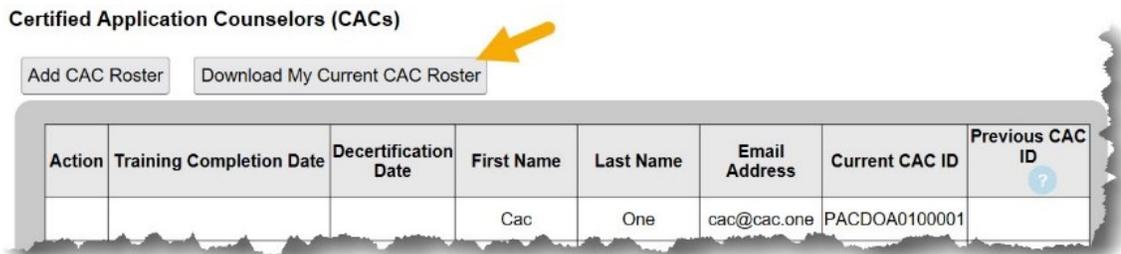


Figure 68: CAC Download My Current CAC Roster Button

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



Figure 69: CAC Roster CSV File Tab



## Active CDO CAC Roster

	A	B	C	D	E	F	G	H	I	J
1	Training Co	Decertifica	First Name	Last Name	Email Addr	Current CA	Previous CAC ID			
2	""	""	"Cac"	"One"	"cac@cac."	"PACDOAC"	""			
3	""	""	"Cac"	"Two"	"cac@cac."	"PACDOAC"	""			
4	""	""	"Cac"	"Three"	"cac@tri.c"	"PACDOAC"	""			

Figure 70: CAC Roster Excel File

5. **Save** your *file* to a location of your choice.

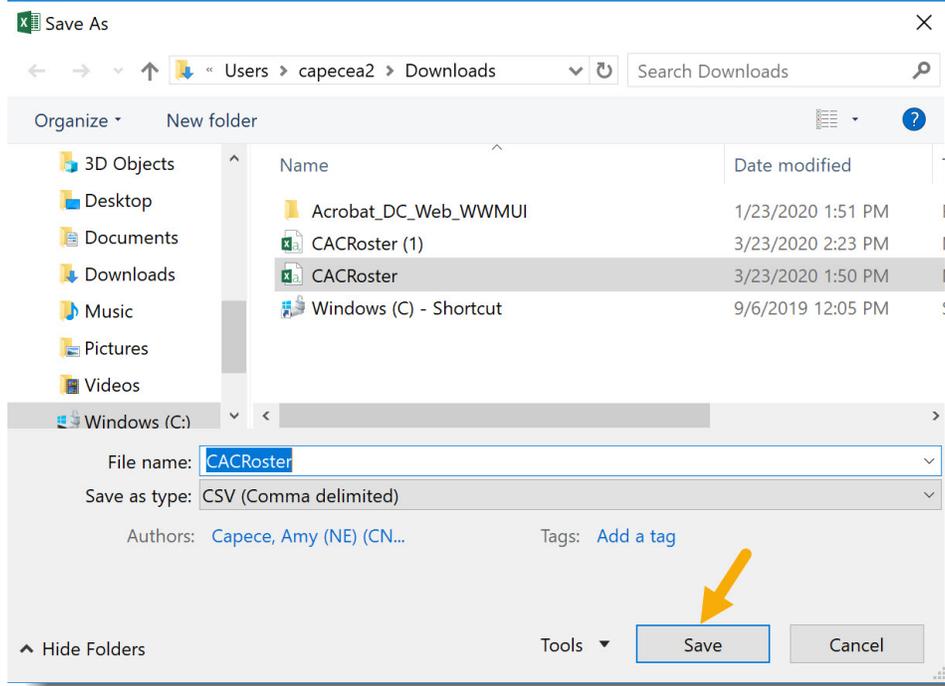


Figure 71: File Location Save Button

6. Once you download your CAC roster, return to the maintenance web form in your browser to continue.



# Active CDO CAC Roster

## 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 certified CAC with your organization.

**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.

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 section, identify the individual you want to decertify.
2. **Select** the **Decertify** link.

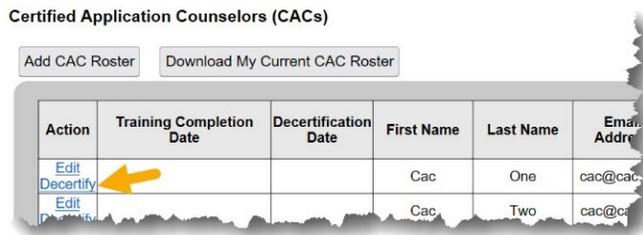


Figure 72: Decertify Link

3. The system will confirm that you want to decertify the individual – **select** the **OK** button

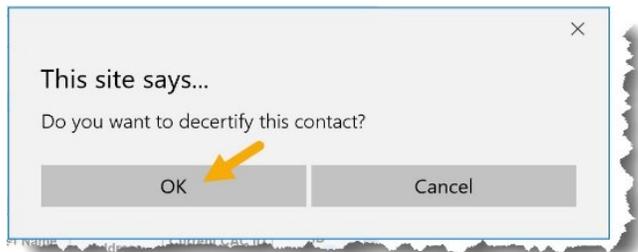


Figure 73: Decertify Pop-up Window OK Button



## Active CDO CAC Roster

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

Certified Application Counselors (CACs)

Add CAC Roster    Download My Current CAC Roster

Action	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
<a href="#">Edit</a> <a href="#">Decertify</a>			Cac	One	cac@cac.one	PACDOA0100001	
<a href="#">Edit</a> <a href="#">Decertify</a>			Cac	Two	cac@cac.two	PACDOA0100002	
		05/12/2020	Cac	Three	cac@tri.cac	PACDOA0100003	

Figure 74: CAC Roster Table

**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.

- Confirm** the information is correct, make additional changes if needed, and **select** the **Exit** button to leave the maintenance web form.



Figure 75: Exit Button



# Active CDO CAC Roster

## 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 section on the CDO Summary page and **select** the **Edit** link.

### Certified Application Counselors (CACs)

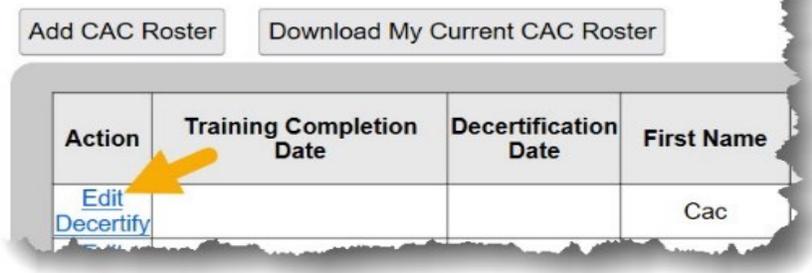


Figure 76: CAC Edit Link

**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.

2. On the CAC Contact Edit page, you can edit the individual's last name or email address. Once you make your changes, **select** the **Save and Return** button.

### CAC Contact Edit Page

#### Instructions

Last Name and Email Address are the only fields you can edit and are indicated with a red asterisk (\*).

If you need to edit any other field on this page, you will need to decertify this CAC and add them again. To do this, select the Cancel button to return to the CAC Roster table and select the Decertify link in the CAC Roster table.

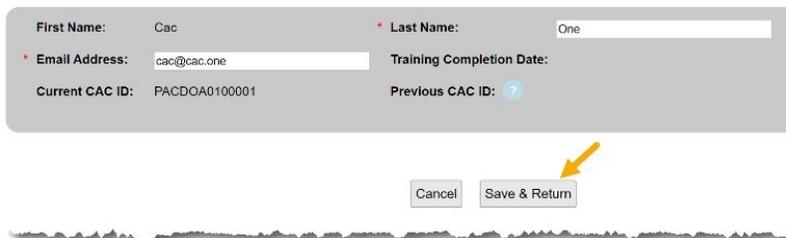


Figure 77: CAC Contact Edit Fields and Save & Return Button



## Active CDO CAC Roster

### 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 – ***select*** the ***Submit*** button. The Confirmation Page will appear where you can download a copy of your submission and exit the maintenance web form.



Figure 78: Submit Button



## Active CDO Renewal

### 6. Active CDO Renewal

CMS certifies CDOs on a two (2)-year basis. To renew your CDO agreement, your unique 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.

**Your unique contacts will be able to renew starting thirty (30) calendar days prior to your organization’s expiration date. Your unique 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](mailto: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.

**Agreement PDF**

Action	File Name	Upload Date	Approval Date	Expiration Date
<a href="#">Replace</a> <a href="#">View</a>	CDO_Agreement (12).pdf	4/22/2020 4:54 PM	4/22/2020	4/22/2022

Figure 79: Expiration Date on the CDO Summary Page of the Maintenance Web Form

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 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**.



## Next Steps

### 7. Next Steps

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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:

- Certify your CAC staff and maintain your CAC Roster per Section II, paragraphs 1 through 4 (Obligations and Conditions) of the CMS-CDO agreement.
- Keep your CDO information current per Section II, paragraphs 5 and 6 (Obligations and Conditions) of the 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 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 contacts
- Service locations
- Enrollment assistance type (open enrollment only or year-round)
- Specialty areas

Your organization's contacts can then access the maintenance web form to make these updates.

If you update your organization name, Organization Senior Official contact information, add or remove a service location state, or edit your address, the maintenance web form will prompt you to upload a new signed and dated CMS-CDO agreement.



## Next Steps

### 7.3. Renewing Your CMS-CDO Agreement

Per Section IV.1 (Effective Date; Term and Renewal) of the CMS CDO agreement, at the end of each two (2)-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 maintenance web form before your expiration date.

You can find your expiration date on the CDO Summary page of the maintenance web form or you can email [CACQuestions@cms.hhs.gov](mailto: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 since 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](mailto: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](#).