

# CAC Roster Transcript

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## CDO Organizational Maintenance Web Form Demonstration Series

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**This document is a transcript for the CDO Organizational Maintenance Web Form  
Demonstration Series.**

## Table of Contents

CAC Roster .....	1
CDO Organizational Maintenance Web Form Video Series.....	1
Session Agenda .....	1
Audience .....	1
Introduction to the CAC Roster.....	1
CAC Roster Requirement .....	1
Functionality on the Maintenance Web Form.....	2
Options for Adding Your CAC Roster .....	2
Tips for Using the CAC Roster Template .....	2
Uploading Your CAC Roster.....	2
Logging in to the Maintenance Web Form .....	3
CAC Roster – Add CAC Roster Button .....	3
CAC Roster – CAC Roster Upload Page .....	3
CAC Roster – Manual Upload: No Button .....	3
CAC Roster – Manual Upload Section .....	3
CAC Roster – Manual Upload Section: CAC 1 .....	3
CAC Roster – CAC Roster Summary Table.....	4
CAC Roster – CAC Roster Table.....	4
Confirmation Page .....	4
CAC Roster – CAC Roster Template Option .....	4
CAC Roster – CAC Roster Template Link .....	4
CAC Roster – CAC Roster Template Instructions .....	5
CAC Roster – CAC Roster Template CAC 1 .....	5
CAC Roster – CAC Roster Template CAC 2 .....	6
CAC Roster – Create CAC Roster CSV File Button .....	6
CAC Roster – Save File.....	7
CAC Roster – Confirmation Pop-Up .....	7
CAC Roster – Template Yes Button.....	7
CAC Roster – Choose File Button .....	7
CAC Roster – Choose File .....	7
CAC Roster – Upload Attached Button .....	7
CAC Roster – CAC Roster Summary Table.....	7

CAC Roster – CAC Roster Table .....	8
Editing a CAC – Edit Link.....	8
Editing a CAC – Save and Return Button.....	8
Editing a CAC – Submit Button.....	8
Decertifying a CAC – Decertify Link.....	8
Decertifying a CAC – OK Button .....	8
Confirmation Page .....	9
Additional Resources .....	9

## CAC Roster

Welcome to the certified application counselor designated organization (CDO) Organizational Maintenance web form demonstration series. This is the certified application counselor (CAC) Roster demonstration.

This is one out of four demonstration videos created by the Centers for Medicare & Medicaid Services (CMS) focused on activities you can complete using the CDO Organizational Maintenance web form.

## CDO Organizational Maintenance Web Form Video Series

There are three other videos in the CDO Organizational Maintenance web form demonstration series.

For an overview of the CDO Organizational 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, access the CDO Organizational Maintenance Web Form Demonstration Videos – Overview and Access Code video.

For a step-by-step demonstration of how to update CDO information using the CDO Organizational Maintenance web form, access the CDO Organizational Maintenance Web Form Demonstration Videos – CDO Data Management video.

For a step-by-step demonstration of renewing an organization's CDO status using the CDO Organizational Maintenance web form, access the CDO Organizational Maintenance Web Form Demonstration Videos – CDO Renewal video.

You can access these videos and other important training modules, FAQs, and videos on the CDO Program page. The website URL is on the screen.

## Session Agenda

During this demonstration, I will describe the CAC roster functionality on the CDO Organizational Maintenance web form, which we will refer to as the maintenance web form, and I will demonstrate how to add a CAC roster, edit a CAC roster, and decertify a CAC.

## Audience

The intended audience for this demonstration is organization contacts who received preliminary approval from CMS and who need to one, upload a CAC roster or, two, edit an existing CAC roster or, three, decertify a CAC.

## Introduction to the CAC Roster

Now, we will discuss the CAC roster requirement and functionality on the maintenance web form.

## CAC Roster Requirement

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

Per Section II of the CMS-CDO Agreement, as authorized by 45 CFR 155.225, organizations that serve as certified application counselor designated organizations (CDOs) with the Centers for Medicare & Medicaid Services (CMS) must upload and maintain a roster of their active CACs.

## Functionality on the Maintenance Web Form

CDOs can use the maintenance web form to add and maintain a roster of CACs. CMS developed functionality to the maintenance web form for you to use to populate your roster of CACs, track their training completion dates, and keep your roster up-to-date.

This functionality allows you to document your CACs full names, email addresses, and CAC IDs, monitor your CACs annual assister certification training completion dates from the MLMS, and maintain your roster of CACs during your two-year certification period.

For plan year 2021 and beyond, maintaining a roster of your active CACs using the maintenance web form is necessary CAC IDs.

## Options for Adding Your CAC Roster

CDOs have two options when adding your roster of CACs.

You can use the manual method on the maintenance web form to submit information on your CACs one-by-one. You can manually add up to five CACs with this method, or using a CMS provided template you can collect information for many CACs at once and upload it to the maintenance web form.

If you have more than five CACs, you must use the CAC roster template. If you have five or less CACs, you can use either method, but you can only add up to five CACs in one session using the manual method.

## Tips for Using the CAC Roster Template

If using the CAC roster template, you should follow all of the instructions on the initial Instructions Tab and the CAC Roster tab.

You should make sure to select the Enable Content button in the yellow ribbon at the top of the template before attempting to add CACs on to the template.

You should 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. If you get an error message and it seems you entered the data correctly consider checking the cell for extra spaces before or after the entered data.

Also, consider entering the data into the cell manually as opposed to copying and pasting the data into the cell to prevent errors.

## Uploading Your CAC Roster

Now, we will demonstrate how to upload your CAC roster for the first time.

Note that sessions expire in sixty minutes, so make sure you can complete your actions within this time frame. If your session expires, you will need to log back into the web form and complete your changes.

## Logging in to the Maintenance Web Form

First, we will log in to the maintenance web form. If you do not have an access code, select the Create Access Code button and follow the instructions to create an access code. There is another CDO Organizational Maintenance Web Form Demonstration video titled Overview and Access Code that you can review for step-by-step instructions for creating an access code.

If you already have an access code, you will enter your Login ID, which is your email address as it was entered on your CDO application, and then you will enter your Access Code that you previously setup.

Then you will select the Login button.

## CAC Roster – Add CAC Roster Button

On the CDO Summary page, you will scroll down to the Certified Application Counselors section at the very bottom of the page. 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.

To add your roster of CACs, you will select the Add CAC Roster button.

## CAC Roster – CAC Roster Upload Page

On the CAC Roster Upload page, you will review the instructions and follow one of two paths. 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 have to use it if you have more than five CACs.

## CAC Roster – Manual Upload: No Button

First, I will demonstrate how to add your CACs manually. To begin, you will select the No button under the question asking whether or not you will be using the CAC Roster template.

## CAC Roster – Manual Upload Section

Once you select the No button, the CAC Roster Manual Upload section will appear. From here, you will enter your CAC's information including their full name, email Address, and current CAC ID. If your CACs have a previous CAC ID, you can enter it here but it is an optional field.

Please note that you cannot edit the Previous CAC ID field after saving, so if you have that information and want to add it, you should do so at this time.

## CAC Roster – Manual Upload Section: CAC 1

So I am going to enter my first CAC's information. I will begin with her first name and then her last name and email address. Then I will complete the next required field, which is her current CAC ID. I'm going to use my CDO ID as the base and then add numbers after that.

If you have more than one CAC, you can select the Save and New button. Remember, you can only add up to five CACs at a time using this manual approach.

I'm just going to add one CAC at this time, so I'm going to select the Save button.

### CAC Roster – CAC Roster Summary Table

The CAC Roster Summary table will appear displaying the information you just entered.

Note, you cannot modify the Training Completion Date field, this will automatically populate by the system once the user completes annual certification training on the MLMS when it becomes available.

You also cannot modify the Decertification Date field. The web form will populate this field only when you select the Decertify link on the CDO Summary page.

Review this information carefully and then select the Save and Return button.

### CAC Roster – CAC Roster Table

The CDO Summary page will appear. Your CAC Roster table at the bottom of the page will now display the CAC you just added.

Remember, you cannot modify the Training Completion Date field or the Decertification Date field.

To submit your roster, you will select the Submit button.

If you do not select the Submit button, the web form will not save your entries.

### Confirmation Page

Once you select the Submit button, a Confirmation page will appear. You can select the PDF button to print a copy of your information, which we recommend, or you can select the Exit button to exit the web form.

I'm going to select the Exit button and then I'm going to Login to complete my next demo.

I enter my login ID, which is the email address that was entered on the application, and I enter the access code that I set up.

Select Login.

### CAC Roster – CAC Roster Template Option

So, I'm back on the CDO Summary page. So now, I will demonstrate how to add your CACs using the CAC Roster template. Scroll down to the bottom. To begin, select the Add CAC Roster button.

### CAC Roster – CAC Roster Template Link

On the CAC Roster Upload page, you will select the CAC Roster Template. This link will open an Excel file you can use to upload your CAC roster.

This template is available on the maintenance web form so you can easily download it and upload a CSV copy using the web form.

## CAC Roster – CAC Roster Template Instructions

I'll open the template. Okay and I opened there in Excel. So, the CAC Roster template will open on the Instructions tab.

The purpose of this template is to provide CDOs a streamlined way to import your CAC information. There are two tabs in the template, the Instructions tab where we are right now and the CAC Roster tab where you will enter your CAC's information. Before we start, you must select the Enable Editing button if you see that in the yellow tab at the top, then you must select the Enable Content button.

Also, adding 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.

The fields you will complete are First Name, Last Name, Email Address, and Current CAC ID. Those are the required fields. The Previous CAC ID field is optional.

On the second tab, the CAC Roster tab, you will start adding your CACs' information.

First, let's review the instructions.

So we need to select the Enable Editing button and then select the Enable Content buttons, which we have already done.

Next, we need to make sure we have all of the necessary data for our CACs readily available so we can complete all of the information in the template.

Next, using the Add Certified Application Counselor button, we'll add new rows to the roster beyond row eleven if adding more than one CAC.

Adding users one by one yields the best results, as a reminder. If you are copying and pasting from another spreadsheet, please check every entry for extra spaces and remove them before creating the CSV file.

Fourth, we will enter data for all required fields, which are indicated by the asterisk. And, again, its First Name, Last Name, Email Address and Current CAC ID.

We will select the Create CAC Roster CSV File button to generate the CSV file to be uploaded through the web form once we have entered all of our CACs

Once we save the file, the template will remain open, so we'll need to navigate back to the CDO Organizational Maintenance web form in your browser to proceed. You will upload the CSV file you saved as CACRosterUpload to the web form.

## CAC Roster – CAC Roster Template CAC 1

So I'm going to start entering my CAC's information on the template. To do that, I am going to start on row eleven and enter the first name of my next CAC, then the last name, email address, and current CAC ID.

If the CACs you are adding worked for a different CDO prior to your organization or if you had a previous CDO ID that recently changed, you can enter the previous CAC ID in the Previous CAC ID field for internal tracking purposes. It is an optional field.

So now, I'm going to select the Add Certified Application Counselor button to add my second CAC. Notice when I do that, the web form gives me an error says the current CAC ID must be 13 characters in length so I'm going to re-try.

I'm going to type this in again. Thirteen characters, one, two, three, four, five, okay I'm going to select the button again. Okay, so now it's giving me an error saying the CAC ID in cell E11 is not properly formatted. So they want to correct these issues.

The three characters after the state abbreviation should be CDO. So here's an example of what the ID should look like. So when you're using your CDO ID, you want to make sure you're using your latest ID which will have the two initials for your state, it will say US if you operate in more than one state, followed by CDO, followed by a letter and two numbers. Then you need to add 5 numbers after that. Okay, so now, I'm going to select the button again and now I have not received any more errors and I can proceed to the next row.

Now I'm going to add my second CAC so I'm going to enter first name, last name and email address and the ID.

Okay, so I'm going to select the Add Certified Application Counselor button to keep going. I do not receive an error and I have a new row that I can keep adding my CACs.

## CAC Roster – CAC Roster Template CAC 2

So this time I'm going to copy and paste from an Excel spreadsheet to show you how that works. I am going to start by copying and pasting one row at a time.

I go to my template that I prepared. Notice that it has the same fields that are in the roster template. I'm going to copy my first row just one cell at a time, Ctrl C, and go back to the roster template, go into my new row and paste. Notice how it pastes all the information. Okay, I'm going to look at things, everything looks okay and I'm going to add another row to my template.

Okay, so next I want to copy the next two CACs at the same time, so I'm going to add another row to my spreadsheet. Okay, so now I can go back and copy and paste.

I'm going to go to my template, copy the next two, paste into the template and now I'm getting an error saying the email address in cell D15 is not valid. I'm going to select OK. I'm going to go into D15 and I notice that it was Sally's email address that did not come in, so I'm going to go back to my template and take a look at her email address, and, yep, sure enough, I notice that my @ sign is missing. The web form will throw an error for that. It wants a valid email address, so, I'm going to copy her email address again, go back to the template and paste.

So now that I have completed this, one last thing I want to do, since I manually added, I'm sorry, I copied some CACs into my template is that I'm going to search for phantom spaces. To do that, I'm going to scroll up to row 11, I'm going to select Ctrl F, and I'm just going to enter a space with my space bar, and select the Find Next button.

So what that's going to show me is any cell that has an extra space in it. So I notice that it's pulling up this particular cell and, sure enough, I have an extra space at the end, so I'm going to get rid of that. If I hadn't done that when I went to upload my template, I would have an error.

So it's important to check for those phantom spaces when you're copying and pasting from another template.

## CAC Roster – Create CAC Roster CSV File Button

So, I want to create my CSV file. I select the Create CAC Roster CSV file and now it's throwing another error that cell E13 must be 13 characters in length. Oops, I got to check that CAC ID, sure enough, I see

that I am missing a zero. Okay, I'm going to try creating my CSV file again and we have another error. We have to enter a first name into B16, so I did, accidentally, add an extra row. So I'm just going to delete that row and create my CSV file again. So, this is what you're looking for.

### CAC Roster – Save File

This pop-up is your Save As pop-up so it's asking you to save your CSV file.

You're going to select the OK button.

Then I'm going to select the location where I want to save my template. Select the OK button again.

### CAC Roster – Confirmation Pop-Up

A pop-up will appear confirming that the template was saved.

You're going to select the OK button.

### CAC Roster – Template Yes Button

As indicated on the instructions in the template, the template will remain open and I need to return to the web form in my internet browser to continue.

I'm going to go to my browser. Here I am back on the CAC Roster Upload Page. So from here I'm going to select the Yes button indicating that I want to upload the roster template.

### CAC Roster – Choose File Button

So now the CAC Roster Template Upload section will appear. I'm going to select the Choose File button.

### CAC Roster – Choose File

I'm going to navigate to the location where I just saved my template. I'm going to select it and select Open.

### CAC Roster – Upload Attached Button

Notice now that the file name appears so I need to select the Upload Attachment button.

### CAC Roster – CAC Roster Summary Table

I'm going to scroll down. In the Attachment Summary table, I will see the View link where I can view the roster that I just uploaded. In the CAC Roster Summary Table, it shows me all the CACs that I just added via the template. Remember, we cannot modify the Training Completion Date field, this will automatically populate by the system once the user completes annual certification training on the MLMS when it becomes available. We also cannot edit the Decertification Date field at this time. You will have to do that back on the CDO Summary page when you decertify a CAC.

Okay, so now I'm going to select the Save and Return button.

## CAC Roster – CAC Roster Table

I see that I'm now back on the CDO Summary page and my Certified Application Counselors table has updated. Notice that Annie is the only one that I can edit or decertify at this time. That's because I have not submitted my other CACs yet.

To submit my whole roster, I need to select the Submit button. Okay, the Confirmation will appear and again, we recommend that you print the PDF for your records. I'm going to select Exit and return to the Login page and log in one last time to show you had to edit and decertify CACs.

## Editing a CAC – Edit Link

After you submit your CAC roster, either manually or using the roster template, you can edit the last name and email address of your CACs. You may need to do this if a CAC's last name changes because of a marriage, for example.

So to edit CACs information, navigate to the CAC section on the CDO Summary page and select the Edit button next to the CAC that we need to edit.

## Editing a CAC – Save and Return Button

On the CAC Contact Edit Page, we can edit, again, only the last name or the email address. I'm going to update the last name and her email address.

The maintenance web form will not permit you to edit the First Name, Current CAC ID, and Previous CAC ID fields. For edits to this data, you will need to decertify the CAC and add them to your roster using their new information.

You cannot modify the Training Completion Date field, again, this will automatically populate by the system once the user completes annual certification training on the MLMS when it becomes available.

So to save this edit, I'm going to select Save and Return.

## Editing a CAC – Submit Button

Once again, we are on the CDO Summary page. To submit this edit, I will select the Submit button.

Before I do that, I want to also decertify a CAC.

## Decertifying a CAC – Decertify Link

So 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.

To decertify a CAC, you're going to navigate to the CAC section on the CDO Summary page. You will select the Decertify link under the Actions column.

## Decertifying a CAC – OK Button

The web form will prompt you and ask you whether you want to decertify this contact, so, you will select OK.

Once you do that, your CAC will move to the bottom of your list. The Decertification Date field will now automatically be populated, and notice that you cannot edit or decertify this individual. To submit this change, you will select the Submit button.

### Confirmation Page

So, now, we have submitted two changes that we made. We made a change to the last name and email address for one of our CACs and decertified another CAC. The Confirmation page will appear. Once again, we recommend you print the PDF confirmation for your records, so you can do that by selecting the PDF button. Otherwise, you can exit the web form by selecting the Exit button.

I will return to the PowerPoint now to talk about additional resources.

### Additional Resources

You can refer to the CDO Program web page for additional resources, including, the CDO Organizational Maintenance web form FAQs, the CAC Roster Job Aid, the CDO Learning Series – CAC Roster video.

The link to the CDO Program web page is on the screen.

That concludes this demonstration.