

# CDO Data Management Transcript

---



## CDO Organizational Maintenance Web Form Demonstration Series

---

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

## Table of Contents

CDO Data Management .....	1
CDO Organizational Maintenance Web Form Video Series.....	1
Session Agenda .....	1
Audience .....	1
Introduction to CDO Data Management.....	1
Requirement to Maintain Information with CMS.....	1
Functionality on the Maintenance Web Form.....	2
Editing Your CDO Record .....	2
Logging in to the Maintenance Web Form .....	2
CDO Summary: Edit Organization Headquarters Information.....	3
Edit Organization Headquarters Information Page .....	3
CDO Summary: Service Locations Table .....	3
Edit Service Locations Page.....	3
CDO Summary: Additional Organization Information .....	4
Edit Additional Organization Details Page .....	4
CDO Summary: Contact Information .....	4
Edit Contact Information Page.....	4
Replace Contact Information Page .....	5
Decertifying a CAC.....	5
Decertifying a CAC – Confirmation .....	5
Decertifying a CAC – Table.....	5
CDO Summary: Editing a CAC.....	5
CAC Contact Edit Page .....	5
CAC Table .....	6
Renewing as a CDO – Replace Link .....	6
CDO Summary: Replace Link.....	6
Agreement and Attestation Page .....	6
CDO Summary: Replace Agreement .....	7
Confirmation Page .....	7
Additional Resources .....	7

## CDO Data Management

Welcome to the certified application counselor designated organization (CDO) Organizational Maintenance web form demonstration series. This is the CDO Data Management 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 CDO Organizational 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 add and update a certified application counselor (CAC) roster using the CDO Organizational Maintenance web form, access the CDO Organizational Maintenance Web Form Demonstration Videos – CAC Roster 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 CDO data management process and how to use the CDO Organizational Maintenance web form, which we will refer to as the maintenance web form, to edit your information and submit a new signed CMS-CDO agreement.

## Audience

The intended audience for this demonstration is organization contacts that need to one, review and edit their organization's information and two, upload a signed CMS-CDO agreement.

## Introduction to CDO Data Management

Now, we will discuss maintaining your CDO record with CMS.

## Requirement to Maintain Information with CMS

Per Section II.5 and 6 of the CMS-CDO Agreement, CDOs must provide CMS with updates on any changes with organizational program contact information and provide CMS with timely and appropriate updates and corrections to ensure the accuracy of the CDO's publicly available information on CMS's website, HealthCare.gov, through the submission of requests for changes on Find Local Help, the assister search tool.

## Functionality on the Maintenance Web Form

CDOs can use the maintenance web form to maintain their information with CMS during their two-year certification period.

This functionality allows you to review all of your organization's information, edit any of your information, and upload a new CMS-CDO agreement.

This functionality allows you to review all of your organization's information, edit any of your information, and upload and maintain your CAC roster, and upload a new CMS-CDO agreement.

It is important to note that once you upload a CMS-CDO agreement, you will not be able to edit any of your information or add your CAC roster until you receive a determination email from CMS. So it is critical to make any necessary changes to your organization's information before submitting a signed agreement.

## Editing Your CDO Record

Now, we will review how to edit your organization's information, if needed, during your two-year CDO certification period.

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

On the maintenance web form Welcome Page, you will enter your login credentials.

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 and resetting an access code.

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

The first thing you should do when you log in is review your organization's information and make sure it is up to date before submitting a new CMS-CDO agreement.

Once we log in to the maintenance web form, we will be on the CDO Summary Page.

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

The first section is the Agreement PDF section. You will replace your agreement in the Agreement PDF table once you review and update your information or if you need to renew your agreement after two years.

If your organization experienced any changes since receiving a Welcome Packet email and you have not updated your information in the maintenance web form yet, you can modify your information by selecting the Edit button next to each section on the CDO Summary page.

## CDO Summary: Edit Organization Headquarters Information

Here on the CDO Summary page I will demonstrate how to edit each section.

The Organization Headquarters Information section on the CDO Summary page allows you to review and/or edit your organization's headquarters information.

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

## Edit Organization Headquarters Information Page

On the Edit Organization Headquarters Information page, you can update any of the fields as necessary. The fields are Organization Name, Organization Federal Employee Identification Number (FEIN), Organization Phone Number, Organization Email Address, and Organization Website URL.

Your Organization Headquarters Address, including the physical address, city, state, and zip code is also included on this page.

For this example, I am going to edit our phone number.

To save my changes and return to the CDO Summary page, I'm going to select the Save and Return button.

So back in the Organization Headquarters Information section I can now see my phone number is up to date.

## CDO Summary: Service Locations Table

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

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

## Edit Service Locations Page

On this page, you can 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.

I am going to select the same state that is listed in my current Service Locations table, which is Arizona.

The Available Counties list populates with the 14 remaining counties that I have not previously selected.

So, I'm going to add additional counties to our counties list. I can filter the list by typing in the county that I want to add, then I can select the county and select the single arrow to move it to my selected counties list.

If I want to add a couple of counties at the same time, I can do that as well by selecting a county, selecting the Control button, and selecting another county. Then I can add them to my Selected Counties list.

Once you select the Update Table button, the Service Locations table at the bottom of the page will update with the counties that you have added or removed if you are removing counties.

You can repeat these steps for each state in which your organization will provide enrollment assistance services.

To save my changes I'm going to select the Save and Return button. The web form navigates back to the CDO Summary page.

## CDO Summary: Additional Organization Information

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

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

## Edit Additional Organization Details Page

You can update any of the information as necessary on this page. That includes your Primary Organization Type, your Organization Specialty and your enrollment assistance type, either Year-round or Open Enrollment only.

For the purposes of this demonstration, I am going to add another specialty area.

To save my changes, I will select the Save and Return button.

The web form navigates back to the CDO Summary page.

## CDO Summary: Contact Information

The Contact Information table on the CDO Summary page allows you to review and/or edit information for your three organization's contacts.

We will begin by editing an existing contact.

Select the Edit link next to the CAC Project Director Contact Information.

## Edit Contact Information Page

On the Edit Contact Information page, the role you selected will appear and all of the fields will prepopulate with the existing contact information that is in the system.

You can update any of the information in any of these fields including First Name, Last Name, Email Address, Job Title, Phone Number, and Phone Extension. I am going to update our phone number.

To save the information I'm going to select the Save and Return button.

The web form returns to the CDO Summary page.

To review my changes, I can scroll back down to the Contact Information section and I see my Project Director here. If I want to review the specific edits I made, I can select the Edit link again because the phone number does not appear in this table.

## Replace Contact Information Page

Now we will replace a contact. To replace a contact, you will select the Replace link underneath the title of the contact that you want to replace. We will replace our Organization Senior Official.

After selecting the Replace link, the web form navigates to the Replace Contact Information page. On this page, you can enter the contact information for your new Organization Senior Official.

I'm going to enter their First Name and Last Name, Email Address and Job Title, and Phone Number.

To save my changes, I'm going to select the Save and Return button.

Back on the CDO Summary page, you can see that I now have a warning at the top of the screen stating that my agreement is out of date. This is because we made a change to the Organization Senior Official. Because this individual is the person who signs the CMS-CDO agreement, when we change any of their information the web form will prompt us to generate, print, and upload a new CMS-CDO agreement for our records.

We will review one remaining section and then we will update a new agreement.

## Decertifying a CAC

In the Certified Application Counselors (CAC) section, you will see your existing CACs that are on your roster. If a CAC leaves your organization, you can update your roster by decertifying that individual. To begin, on the CDO Summary page, in the CAC section, identify the individual you want to decertify and select the Decertify link.

## Decertifying a CAC – Confirmation

The system will prompt me, asking if I want to decertify this contact. We'll select the OK button.

## Decertifying a CAC – Table

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 CAC roster table.

Confirm this information is correct before you submit your changes.

## CDO Summary: Editing a CAC

During your two-year certification, your 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, you will navigate to the CAC section on the CDO Summary page and select the Edit link next to the CAC who you want to make changes for.

## CAC Contact Edit Page

Once you select the Edit link, the web form will display the CAC Contact Edit Page.

You can only edit the CAC's Last Name and their Email Address.

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

Once you make your edits, you can select the Save and Return button to return to the CDO Summary page.

## CAC Table

On the bottom of the CDO Summary page, in the CAC section, I can review my list of CACs again.

You cannot modify the Training Completion Date field, this will automatically populate by the system once the user completes Annual Certification training on the Marketplace Learning Management System (MLMS) when it becomes available.

## Renewing as a CDO – Replace Link

CMS certifies organizations for two years. After your CMS-CDO certification expires in two years, you will need to upload a new agreement.

Also, if you make any changes to your record during your two years that impact the agreement, the web form will prompt you to upload a new agreement. That is what happened here since we updated or replaced our Organization Senior Official.

## CDO Summary: Replace Link

To begin, we will select the Replace link in the Agreement PDF table.

It is important to note that once you upload a CMS-CDO agreement, you will not be able to edit any of your information until you receive a determination email from CMS. So it is critical to make any necessary changes to your organization's information before submitting a signed agreement.

When you select the Replace link, the web form will prompt you to make sure you have made all your changes before submitting an agreement.

Since we have made changes, I'm going to select the Ok button.

## Agreement and Attestation Page

On the Attestation and Agreement Upload page, I'm going to select the Print PDF Agreement button. This will generate a copy of my CMS-CDO agreement that is pre-populated by the information from the maintenance web form.

You will need to obtain your Organization Senior Official's signature outside of the web form and then save it and upload it back to the web form before uploading your final copy.

Remember, to make sure you upload pages one through twelve of your agreement, ensure that information on pages one and twelve of the agreement match your organization's information as it is listed in the maintenance web form, and ensure that the signature of the Organization Senior Official matches the person listed in your maintenance web form before submitting your agreement.

You can check the Organization Senior Official's information on page twelve of the agreement. I confirm that my updates did save and my new Organization Senior Official is listed on page twelve of the agreement.

I'm now ready to print this, obtain their signature, save it, and upload it back to the web form.

### CDO Summary: Replace Agreement

Back on the Attestation and Agreement Upload page of the maintenance web form, I'm going to select the Choose File button under the Upload a File section. The web form displays a pop-up window.

In the pop-up window, navigate to the place where you saved your CMS-CDO agreement on your computer. Select the file, and select the Open button. The web form will return to the Attestation and Agreement Upload page and you can see that your file name is now listed next to the Choose File button.

You will select the Upload Attachment button to finish uploading your agreement.

In the Attachment Summary table, you can select the View link to open your file to make sure it is the correct version. If the agreement did not upload, the web form will display a warning message.

To save the copy of the agreement that you uploaded, select the Save and Return button. And we're back on the CDO Summary page.

To submit the changes you made and the submission of the CMS-CDO agreement, you will scroll to the bottom of the CDO Summary page and select the Submit button.

### Confirmation Page

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

This completes the editing process demonstration.

I will now return to the PowerPoint to review 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 CDO Learning Series – CDO Data Management video.

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

This completes this demonstration.