

CDO Renewal Transcript



CDO Organizational Maintenance Web Form Demonstration Series

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

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CDO Renewal

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

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 when and how to renew your CMS-CDO agreement with the Centers for Medicare and Medicaid Services (CMS) and how to update your information before submitting a new signed and dated CMS-CDO agreement.

Audience

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

Introduction to CDO Renewal Process

Now, we will discuss how often you need to renew your CDO status with CMS and the functionality available on the maintenance web form.

How Often to Renew

Per Section IV.1 of the CMS-CDO agreement, CMS designates CDOs for a two-year period.

You are responsible for submitting a new signed and dated CMS-CDO agreement every two years to renew your certification as a CDO.

Functionality on the Maintenance Web Form

Active CDOs do not need to submit a new CDO application to renew every two years. CDOs can use the maintenance web form to maintain their information with CMS during their two-year certification period and upload an updated and signed CMS-CDO agreement every two years.

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.

Renewing Your CMS-CDO Agreement

Now, we will review how to renew your organization's certification with CMS.

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 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.

CDO Summary

First, you should 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.

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.

Editing Organization Headquarters Information

In this demonstration, we will edit our list of contacts. To begin, we will replace our CAC Project Director by selecting the Replace link in the Action column of the CAC Project Director Contact table.

Edit Organization Headquarters Information Page

On the Replace Contact Information page, you can add your new contact's information. In this example, I will add our new CAC Project Director.

I enter their First Name, Last Name, Email Address, Job Title, and Phone Number. To save my changes, I will select the Save and Return button.

CDO Summary

Back on the CDO Summary page, you can review the Contact Information section and confirm the contact change.

Warning Message and Agreement PDF Table

Now that we discussed how to review your organization's information and edit any information as needed, I will demonstrate how to renew your CMS-CDO agreement by adding your new signed and dated CMS-CDO agreement.

In the Agreement PDF table, at the top of the CDO Summary page, notice there are two links available to you – Replace and View. To upload a new signed and dated agreement, you will select the Replace link.

The web form will prompt you to make any changes before you submit your agreement. We have already updated our information so I'm going to select the OK button.

Renewing as a CDO – Print PDF Agreement

On the Attestation and Agreement Upload page, you can generate a pre-populated version of your CMS-CDO agreement by selecting the Print PDF Agreement button.

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.

Review the CMS-CDO Agreement PDF

Once you open the PDF version of your CMS-CDO agreement, you should verify the information on pages one and twelve. The web form pre-populates these pages with your organization's information.

Page one of the agreement lists the organization name and all of your organization's service location states. Please review this section thoroughly and make sure it matches the information on the maintenance web form.

Page twelve of the agreement lists the Organization Senior Official's name and title, your organization's name, your CDO Application ID, and your organization's address.

Your Organization Senior Official listed on page twelve of the agreement must sign and date this page before you upload it to the maintenance web form for CMS's review.

Save the File

Now you will save and print this agreement to obtain your Organization Senior Official's signature.

After you obtain your Organization Senior Official's signature, you can update pages one through twelve of your agreement. You will upload these pages.

To expedite the review process and help ensure that CMS accepts your agreement, please make sure to include pages one through twelve of your agreement. That all of your information on pages one and twelve match the information on the maintenance web form, and make sure that the Organization Senior Official listed on page twelve of the agreement signed and dated the agreement before you submit it.

Renewing as a CDO – Choose File

To upload the new signed and dated agreement, return to the web form and select the Choose File button on the Attestation and Agreement Upload page.

Renewing as a CDO – Upload Attachment

A pop up will appear where you can navigate to the location of the file, select the file and select the Open button. Back on the web form, you see that your agreement title is listed next to the Choose File button. Now you will select the Upload Attachment button.

Renewing as a CDO – Submit Button

Your file will appear in the table. You can select the View link to review the file you attached to make sure it's the right copy.

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

The CDO Summary page will appear and you will scroll to the bottom of the page and select the Submit button to submit your changes and your agreement.

Renewing as a CDO – 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.

Once CMS completes the review of your updated CMS-CDO agreement, they will notify you of the status. If CMS requires changes to your agreement, you must review the requested changes, access the web form, and submit a new agreement.

If CMS accepts your agreement, they will send you a confirmation email. Unless you changed service location states, your CDO ID will remain the same and CMS will certify your organization for another two years.

Now I will 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 Renewal video, and the CDO Renewal Job Aid.

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

This completes this demonstration.