

CDO Contact Changes Job Aid

Overview

Certified Application Counselor Designated Organizations (CDOs) may use the CDO Organizational Maintenance web form, referred to as the maintenance web form, to add, update, or replace any of its leadership contacts – Organization Senior Official (required), CAC Project Director (required), and/or Secondary Contact (optional) with the Centers for Medicare & Medicaid Services (CMS).

This job aid will walk through how to:

- ***Edit, Replace, or Move an Existing Contact***
- ***Add or Delete a Secondary Contact***
- ***Generate and Upload a New CMS-CDO Agreement***

Background

During their certification period (typically two (2) years), CDOs must update their CDO record with CMS if any changes occur to the following:

- Organization Name
- Organization Address
- Any of the CDO's leadership contacts – includes changes to email address, phone number, first name, or last name
- Service Locations
- Enrollment Assistance Type
- Specialty Areas
- Certified Application Counselor (CAC) roster

To ensure the CDO doesn't miss important CMS-CDO Program Office information they must update their CDO record timely with changes to the email address, phone number, first name, or last name of their leadership contacts.

Additional Help, Resources and Troubleshooting

For more information on how to [maintain a record with CMS](#), demos on [working in the web form](#), [managing CDO data](#), along with [FAQs](#) and other resources, visit the [Information for Active CDOs](#) page on Marketplace.cms.gov.

If a CDO is unsure who their CDO's leadership contacts are, or none of the initial leadership contacts remain with their organization, follow the instructions below. Once CMS receives this information, CMS will update the CDO's contact list and will send the new contacts a Welcome Packet email with the CDO ID, the counter signature page of the CMS-CDO Agreement, and critical information about the CDO Program.

- If they do not know who their organization's leadership contacts are, they can email CACQuestions@cms.hhs.gov and request this information.
- If none of their initial leadership contacts remain with their organization, they can email CACQuestions@cms.hhs.gov and provide the following information for each of their new leadership contacts:
 - Full Name
 - Title that person is assuming within their CDO – Organization Senior Official, CAC Project Director, or Secondary Contact (not required)
 - Job Title (CEO, Director, etc.)
 - Phone Number
 - Email Address

Manage Contacts

One of the CDO's leadership contacts must use the maintenance web form to update their organization's information. Remember that their organization must have two leadership contacts – an Organization Senior Official and a CAC Project Director – on file. Though not required, a CDO may designate a third contact, referred to as the Secondary Contact.

- The Organization Senior Official must be someone who can bind the organization legally and financially.
- The CAC Project Director is responsible for maintaining compliance with CDO requirements, certifying CAC staff and volunteers, keeping CAC certification records, and updating organization information with CMS.
- The Secondary Contact may serve as an additional contact person who supports your CAC Project Director and is knowledgeable about your program's operations.

Edit, Replace, or Move an Existing Contact

You can edit a contact's information, replace an existing contact, or move a contact to a different role using the maintenance web form.



Warning: The maintenance web form will not allow a contact to fill more than one CDO Program role at the same time: Organization Senior Official, CAC Project Director, or Secondary Contact.

To edit, replace, or move an existing contact:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the **Contact Information** table on the **CDO Summary** page, select **Manage Contacts**.
3. On the **Edit Contact Information** page, make the necessary edits to any of the contact's information including editing specific fields for a contact or moving contacts to different roles.
4. When edits are complete, select **Save & Return** either at the top or the bottom of the page.
5. On the **CDO Summary** page, select **Submit** either at the top or the bottom of the page.



Warning: Your changes will not go into effect until you select **Submit** on the **CDO Summary** page.

6. On the **Confirmation** page, select **Print PDF** to generate a PDF confirmation containing the information submitted. CMS recommends that you print and save this document for your records.

Your contacts will also receive an acknowledgement email confirming receipt of your changes.

Add or Delete a Secondary Contact

Though not required, a CDO may elect to designate a third contact, referred to as the Secondary Contact. If a CDO decides to add a Secondary Contact after submitting their CDO application, they can do so using the maintenance web form. If there is no longer a need for a Secondary Contact or the individual leaves the organization, the CDO may delete the Secondary Contact.

To add a Secondary Contact:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the **Contact Information** table on the **CDO Summary** page, select **Manage Contacts**.
3. On the **Edit Contact Information** page, select the checkbox next to the **Secondary Contact** information.
4. Add the following information for each of their new unique contacts:
 - Full Name
 - Title that person is assuming within their CDO – Organization Senior Official, CAC Project Director, or Secondary Contact (not required)
 - Job Title

- Phone Number
 - Email Address
5. When edits are complete, select **Save & Return** either at the top or the bottom of the page.
 6. On the **CDO Summary** page, select **Submit** either at the top or the bottom of the page.



Warning: Your changes will not go into effect until you select **Submit** on the **CDO Summary** page.

7. On the **Confirmation** page, select **Print DF** to generate a PDF confirmation containing the information submitted. CMS recommends that you print and save this document for your records.

Your contacts will also receive an acknowledgement email confirming receipt of your changes.

To delete a Secondary Contact:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the **Contact Information** table on the **CDO Summary** page, select **Manage Contacts**.
3. On the **Edit Contact Information** page, select **Delete** beneath the **Secondary Contact** information.
4. When edits are complete, select **Save & Return** either at the top or the bottom of the page.
5. On the **CDO Summary** page, select **Submit** either at the top or the bottom or the page.



Warning: Your changes will not go into effect until you select **Submit** on the **CDO Summary** page.

6. On the **Confirmation** page, select **Print DF** to generate a PDF confirmation containing the information submitted. CMS recommends that you print and save this document for your records.

Your contacts will also receive an acknowledgement email confirming receipt of your changes.

Generate and Upload a New CMS-CDO Agreement

If a CDO changes the first name or last name for their Organization Senior Official or replaces their Organization Senior Official with a new contact, the maintenance web form will prompt to generate, sign, and upload a new CMS-CDO Agreement:

To generate your agreement:

1. Log in to the [CDO Organizational Maintenance Web Form](#).
2. In the **Agreement PDF** table on the **CDO Summary** page, select **Replace**.
3. In the pop-up select **OK** after updating any of your organization's information as needed.
4. On the **Attestation and Agreement Upload** page, select **Print PDF Agreement**.
5. Review pages 1 and 12 of the agreement and confirm your organization's information. If any information is incorrect, return to the **Attestation and Agreement Upload** page and select **Cancel**. Repeat steps 2 through 5 to generate another agreement.
6. Obtain your Organization Senior Official's signature and date the signature page of the agreement.

To upload your agreement:

1. In the **Agreement PDF** table on the **CDO Summary** page, select **Replace**.
2. On the **Attestation and Agreement Upload** page, select **Upload a File**.
3. In the pop-up window, navigate to the place you saved a PDF version of your updated, signed agreement on your computer and select the file to upload.
4. Select **Save & Return**. If you did not successfully upload your agreement, you will receive a warning message.
5. On the **CDO Summary** page, select **Submit** either at the top or the bottom of the page.



Warning: Your changes will not go into effect until you select **Submit** on the **CDO Summary** page.

6. On the **Confirmation** page, select **Print PDF** to generate a PDF confirmation containing the information submitted. CMS recommends that you print and save this document for your records.

Your contacts will also receive an acknowledgement email confirming receipt of your changes and updated CMS-CDO Agreement.