

CERTIFIED APPLICATION
COUNSELOR DESIGNATED
ORGANIZATION

*CDO Organizational Maintenance
Web Form User Guide*





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A. Introduction

Certified Application Counselor Designated Organizations (CDOs) are a vital component of the Assister community. In the Federally-facilitated Marketplaces (FFMs), CDOs oversee Certified Application Counselors (CACs) who are trained and able to help consumers seeking health insurance coverage options through an FFM.

The CDO Organizational Maintenance Web Form (OMWF), referred to as the maintenance web form, is the platform that approved CDOs use to maintain information about their organization with CMS, including their CAC roster.

1. Helpful Resources & Tips Before Getting Started

Before you start, reference this user guide to understand what information you need to complete the maintenance web form.

For additional CDO maintenance web form and CAC roster information, please access the following resources:

- [CDO Program web page](#) – contains additional resources and information for organizations interested in becoming a CDO.
- [CDO Roster Job Aid](#) – provides step-by-step instructions about adding and updating a CAC roster.
- [CDO Renewal Job Aid](#) – provides step-by-step instructions about adding and updating your organization's information and submit a new signed and dated CMS-CDO agreement when required.
- [CDO Organizational Maintenance Web Form Demonstration video – 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 Troubleshooting FAQs](#) – provides frequently asked questions about the maintenance web form and CAC application process including the CAC roster.
- [CDO Learning Series – CDO Renewal video](#) – discusses the process for renewing your CDO agreement with CMS.

For information on the CDO application process, please access the following resource:

- [CDO Learning Series – CDO Application](#) – discusses the CDO application process.

2. CDO Organizational Maintenance Web Form Process Overview

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.*

You will use the maintenance web form to:

- Complete the CDO Application process by reviewing and submitting your signed CMS-CDO Agreement.



- Complete your renewal within a timeframe determined by CMS, typically two years from the effective date, by reviewing existing organization information and uploading a new signed CMS-CDO agreement, including a Conflict of Attestation form.
- Maintain up-to-date administrative data on CDO headquarter location, service locations, designated contacts information, etc.
- Update your Operating State, Organization Name, or Organization Senior Official's name. If you update your Operating State, Organization Name, or Organization Senior Official's name, you must execute an entirely new agreement with CMS.
- Update your Service Location(s) or Headquarters Address. If you update your Service Location(s) or Headquarters Address, CMS will acknowledge these changes through an update to your record with CMS and will provide written confirmation of the amendment to your previously signed CMS-CDO agreement.
- Submit and maintain a roster of CACs. It is a requirement of the CMS-CDO Agreement to maintain a roster of at least one certified CAC.
- 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. Moving forward, you can access the maintenance web form to keep your information up to date with CMS.

NOTE: *Your leadership contacts (Organization Senior Official, CAC Project Director, and 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.*



B. 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 [CDO Organizational Maintenance Web Form](#).

The screenshot shows the CMS logo at the top left, with the text "CENTERS FOR MEDICARE & MEDICAID SERVICES" and "CENTER FOR CONSUMER INFORMATION & INSURANCE OVERSIGHT". Navigation links include "User Guide", "CDO Renewal Job Aid", "CAC Roster Job Aid", and "Contact Change Job Aid". The main heading is "Welcome to the Organizational Maintenance Web Form".

The page lists four purposes for the web form:

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 (password) or create an access code (password) to access the Organizational Maintenance web form.

I have not created an access code (password)
 Select the **Create Access Code** button to create an access code (password).
 [Create Access Code]

I have an access code (password)
 Enter the Organization Senior Official or CAC Project Director email address in the Login ID field and the access code (password) you created in a previous session in the Access Code field. Then select the **Login** button.
 If you forgot your access code (password), select the **Forgot Access Code** link to reset your access code (password).

The login form contains:

- **Login ID:** [text input field]
- **Access Code:** [text input field]
- [Login button]
- [Forgot Access Code](#)

By using this web form, you accept the terms and conditions. If you decline, you should not use the web form.

- This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network.
- This system is provided for Government-authorized use only.
- Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties.
- Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.
- By using this system, you understand and consent to the following:
 - The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this system.
 - Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose.

CMS/HHS Vulnerability Disclosure Policy
 The Centers for Medicare & Medicaid Services (CMS) ("us," "we," or "our") is committed to ensuring the security of the American public by protecting their information from unwarranted disclosure, available at <https://www.cms.gov/vulnerability-disclosure-policy>.

CMS.gov Privacy Policy
 Protecting your privacy is very important to us. This privacy policy describes what information we collect, why we collect it, and what we do with it, available at <https://www.cms.gov/privacy>.

Figure 1: Welcome to the Organizational Maintenance Web Form Page



Upon your initial login, you must enter or create an access code (password) to proceed with the maintenance web form; you will follow different paths in the maintenance web form depending on whether 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 (password)	Refer to Section B1.
You have an access code (password)	Refer to Section B2.
You forgot your access code (password)	Refer to Section B3.

1. Create Access Code (Password)

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 (password):

Step 1 Select **Create Access Code** on the “Welcome” page of the maintenance web form.

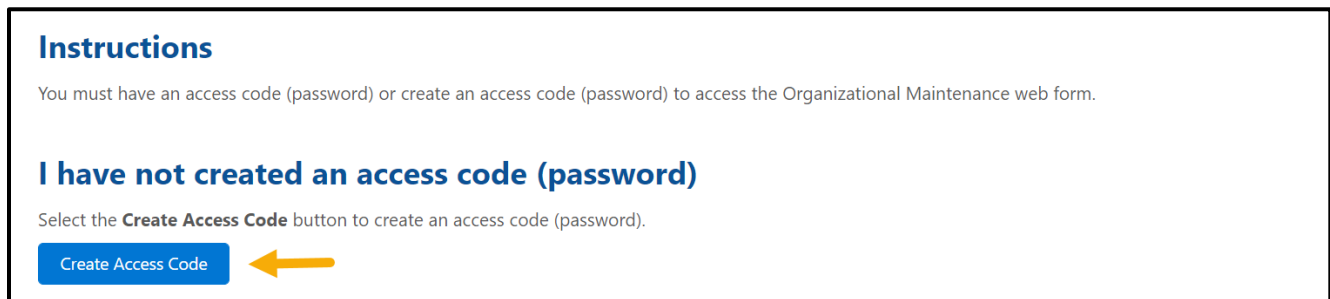


Figure 2: Create Access Code Button

Step 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 in the CDO application. You must enter the same email address for the Organization Senior Official, Project Director, or Secondary Contact as you did on your CDO application.*

Step 3 Create and enter an **Access Code** that meets the 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

Step 4 Confirm the **Access Code** by entering it again.

***NOTE:** Please notate your access code and keep it in a secure place, as you will use this code to log into the maintenance web form each time.*

Step 5 Select two **security questions** and enter the corresponding responses to each.

Step 6 Select **Continue** to proceed.

Figure 3: Create Access Code Page Fields

Step 7 The maintenance web form will direct you to the “Access Code Confirmation” page. On the “Access Code Confirmation” page, select **Continue**. The maintenance web form will return you to the login page.

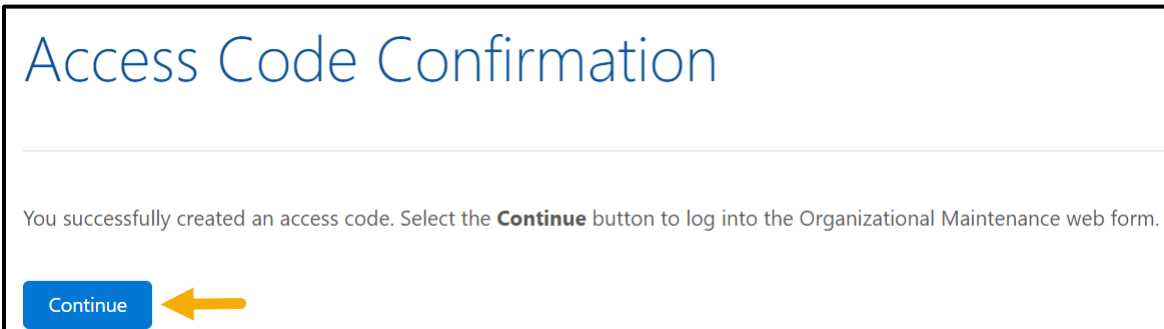


Figure 4: Access Code Confirmation Page Continue Button

2. I Have an Access Code

If you already have an access code, proceed to “I have an access code” on the “Welcome” page.

Step 1 Enter your **Login ID** (i.e., your email address on record).

Step 2 Enter your **Access Code**.

Step 3 Select **Login**.

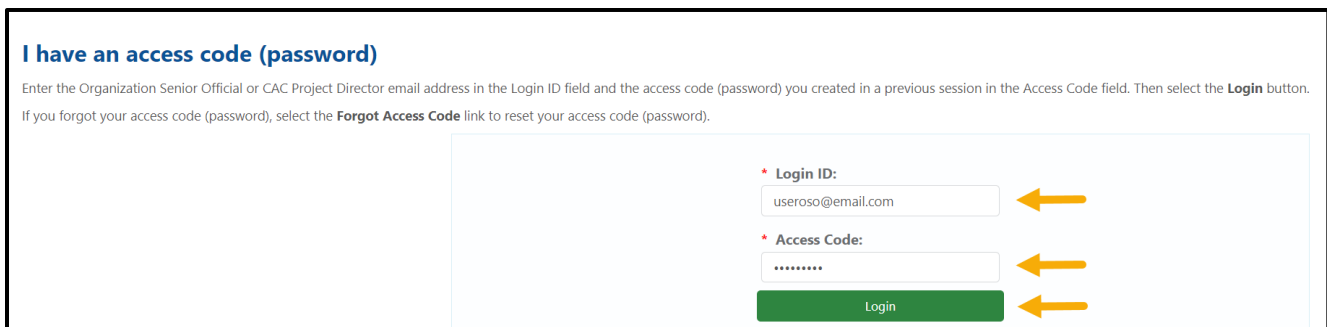


Figure 5: Welcome Page Login Button

3. Forgot Access Code

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



I have an access code (password)

Enter the Organization Senior Official or CAC Project Director email address in the Login ID field and the access code (password) you created in a previous session in the Access Code field. Then select the **Login** button. If you forgot your access code (password), select the **Forgot Access Code** link to reset your access code (password).

* Login ID:
useroso@email.com

* Access Code:

Login

[Forgot Access Code](#) ←

Figure 6: Welcome Page Forgot Access Code Link

- Step 1** On the “Forgot Access Code” page, enter your **email address** on record.
- Step 2** Select **Send PIN**. The maintenance web form will send a PIN to the **email address on record** (the email you provided in the CDO Application). 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 (password). The red asterisk (*) indicates required fields.

* Organization Senior Official or CAC Project Director Email Address:
useroso@email.com

Send PIN ←

Figure 7:Forgot Access Code Page Send PIN Button

- Step 3** Once you receive a six-digit PIN, return to the maintenance web form.
- Step 4** Select the **Forgot Access Code** link on the “Welcome” page.



I have an access code (password)

Enter the Organization Senior Official or CAC Project Director email address in the Login ID field and the access code (password) you created in a previous session in the Access Code field. Then select the **Login** button. If you forgot your access code (password), select the **Forgot Access Code** link to reset your access code (password).

* Login ID:

* Access Code:

[Forgot Access Code](#) ←

Figure 8: Welcome Page Forgot Access Code Link

Step 5 On the “Forgot Access Code” page, enter the **email address** and **PIN**.

Step 6 Select **Continue**. 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 (password). The red asterisk (*) indicates required fields.

* Organization Senior Official or CAC Project Director Email Address:

* PIN:

Figure 9: Forgot Access Code Window

Step 7 On the “Reset Access Code” page, create and enter an **Access Code** that meets the requirements.

Step 8 Confirm the **Access Code** by entering it again.

Step 9 Enter the corresponding responses to each of the previously established security questions.

Step 10 Select **Continue** to proceed.

***NOTE:** Please notate your access code and keep it in a secure place, as you will use this code to log into the maintenance web form each time.*



Figure 10: Reset Access Code Window

Step 11 On the “Access Code Reset Confirmation” page, select **Continue**. The maintenance web form will return you to the login page.

Figure 11: Access Code Reset Confirmation Message



C. CDO Summary Page

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

CMS encourages CDOs to review and update all your organization’s information (addresses, contacts, service area(s), etc.) **before** uploading the agreement.

The maintenance web form will prompt you when your CMS-CDO agreement needs updating.

You can access a CDO Submissions Summary of all the changes submitted by selecting **View All Submissions**.

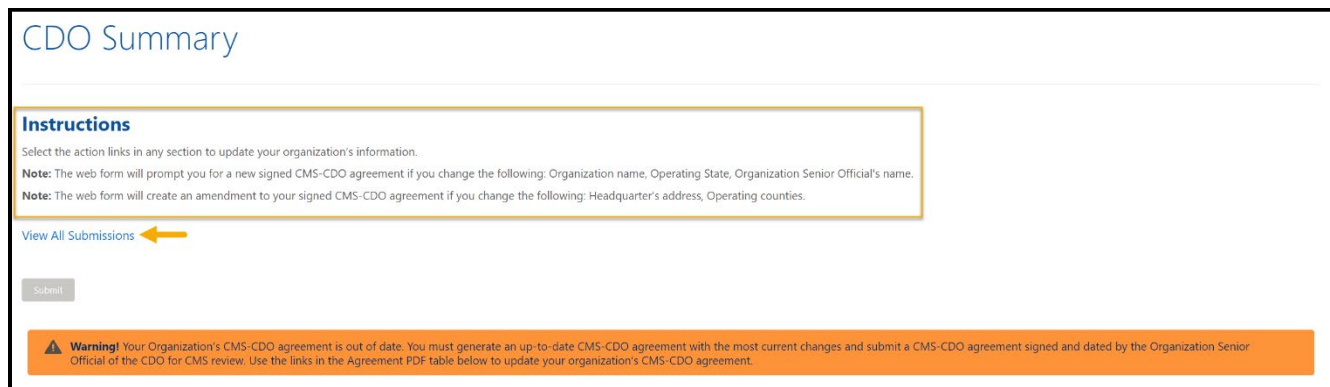


Figure 12: CMS-CDO Agreement Prompt and View All Submissions Link

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 Operating State, Organization Name, or Organization Senior Official’s name.
- Your CMS-CDO agreement expired.

If you submitted a new CMS-CDO agreement or made a change during your last session that generated an amendment to your agreement, the maintenance web form will lock down, and you will not be able to make any updates while your agreement or amendment is under review.



Figure 13: CMS-CDO Lock Down Prompt

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.

Table 2: CDO Summary Page Sections

If	Then
If you want to generate a new copy of the agreement	Refer to Section C1 .
You want to review and/or edit your organization’s headquarters information	Refer to Section C2 .
You want to review and/or edit your organization’s service locations	Refer to Section C3 .
You want to review and/or edit your organization’s additional details	Refer to Section C4 .
You want to edit or replace the contact information for one or more of your organization’s contacts	Refer to Section C5 .
You want to view and/or replace your CMS-CDO signed agreement	Refer to Section C6 .

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.

Step 1 Select **Add** to upload your signed CMS-CDO agreement.



Figure 14: Agreement PDF Table Add Link

Step 2 Upload your signed CMS-CDO agreement:

- a. Select **Upload a File**.

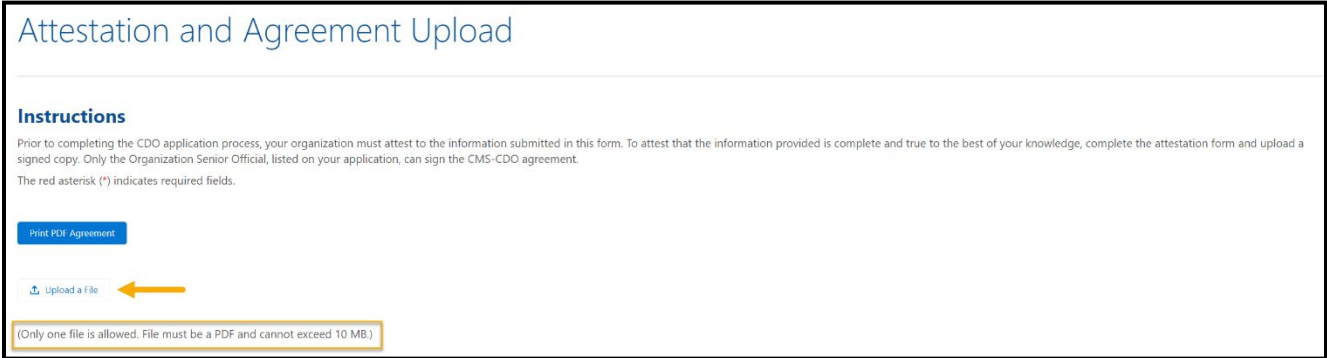


Figure 15: Attestation and Agreement Upload a File Button

- b. In the pop-up window, navigate to the place where you saved the PDF version of your signed CMS-CDO agreement on your computer and select the **file**. The maintenance web form will return you to the “Attestation and Agreement Upload” page.
- c. Select **View** to open your file. If the agreement did not upload, the maintenance web form will display a warning message.

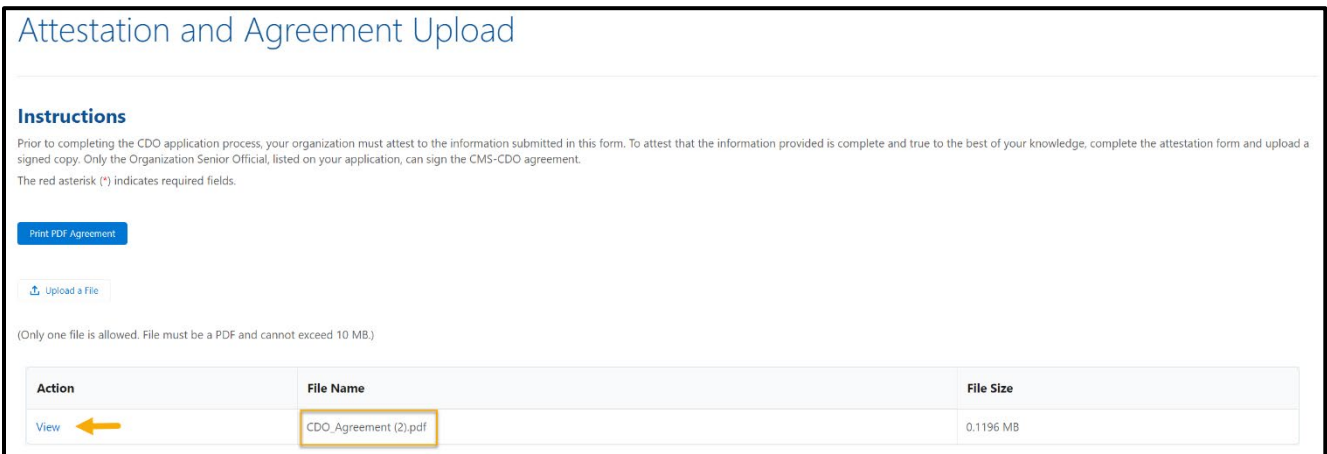


Figure 16: Attachment View Button

- d. Select **Save & Return** to return to the “CDO Summary” page.

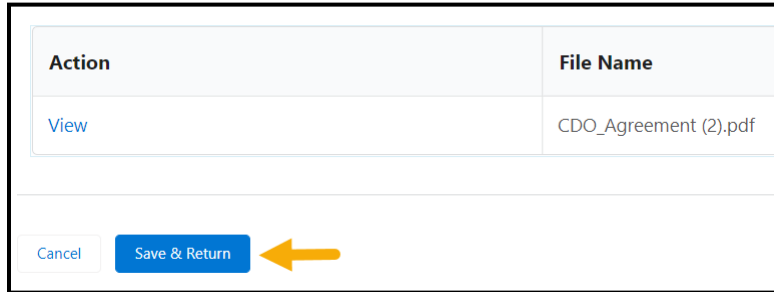


Figure 17: Save & Return Button

- e. On the “CDO Summary” page, select **Submit** at the top or the bottom of the page to submit your CMS-CDO agreement.

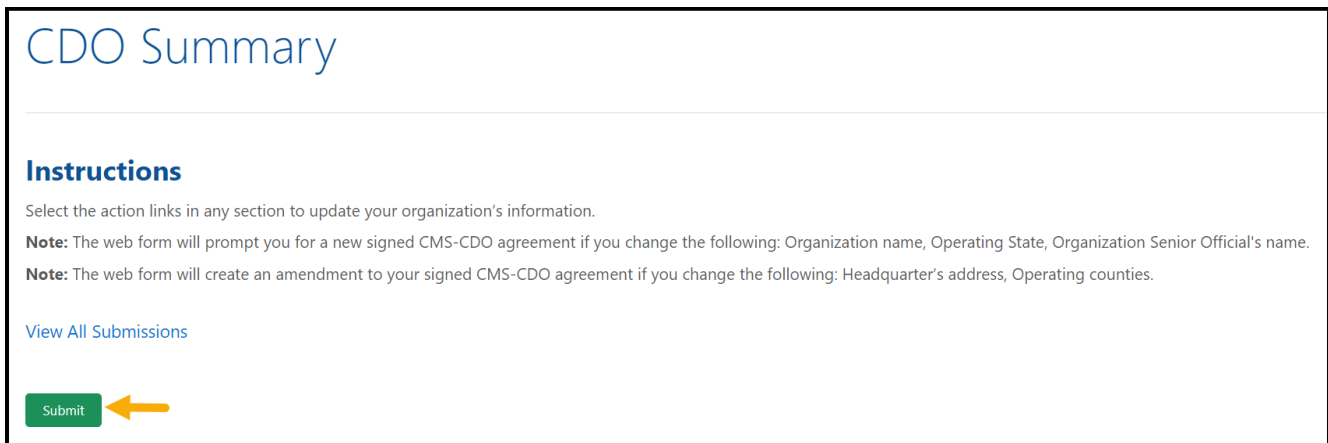


Figure 18: CDO Summary Page Submit Button

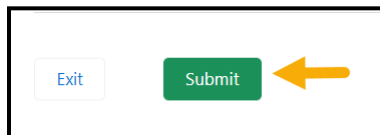


Figure 19: CDO Summary Page Submit Button – Bottom of Page

WARNING: After you submit a CMS-CDO agreement, CMS will review the agreement. While an agreement is under review by CMS your account is **locked** and you will be unable to edit your organization’s information, including your CAC roster. After receiving a determination email your account will be unlocked again and you will then be able to edit your organization’s information using the maintenance web form.

- f. Refer to [Section D](#) for “Confirmation” page instructions.



2. Organization Headquarters Information Section

The “Organization Headquarters Information” section allows you to review and/or edit your organization’s headquarters information.

Step 1 In the Organization Headquarters Information table of the “CDO Summary” page, select **Edit** to update your organization headquarters information. The maintenance web form will take you to the “Edit Organization Headquarters Information” page.

Organization Headquarters Information

Organization Name: ETO Org	Address Line 1: 555 Any Street
Organization Federal Employee Identification Number (FEIN): 65-6666666	Address Line 2:
Organization Phone Number: (555) 555-5555	City: Wilmington
Organization Email Address: etoorg@email.com	State: DE
Organization Website URL:	Zip Code: 19801

[Edit](#) ←

Figure 20: Edit Organization Headquarters Information Page Edit Link

Step 2 On the “Edit Organization Headquarters Information” page, update your information as needed for the following:

- Name
- Federal Employee Identification Number (FEIN) (if applicable)
- Phone Number
- Email Address
- Website URL (if applicable)
- Street Address
- City
- State
- Zip Code

Step 3 When edits are complete, select **Save & Return** 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 in the system.
The red asterisk (*) indicates required fields.

Organization Information

* Organization Name:
ETO Org

Organization Federal Employee Identification Number (FEIN):
65-6666666

* Organization Phone Number:
(555) 555-5555

* Organization Email Address:
etoorg@email.com

Organization Website URL:

Organization Headquarters Address

* Address Line 1:
555 Any Street

Address Line 2:

* City:
Wilmington

* State:
DE

* Zip Code:
19801

Cancel **Save & Return**

Figure 21: Edit Organization Headquarters Information Save & Return Button

Step 4 Refer to **Table 2** and continue editing your organization’s information.

WARNING: If you change your organization’s name, when you select Save & Return 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 Replace Agreement for instructions on how to generate and upload your updated CMS-CDO agreement.

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

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.

Step 1 In the Service Locations table of the “CDO Summary” page, select **Edit** to edit your service locations. The maintenance web form navigates to the “Edit Service Locations” page.



State	County
Delaware	Kent, New Castle, Sussex

[Edit](#)

Figure 22: Edit Service Locations Button

Step 2 On the “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.

Service Locations

Instructions

Select the state in which your organization will provide enrollment assistance services. If you operate in more than one state, you must complete the service location selection activities for one state before adding another state. Include the state and county where your organization headquarters is located if your organization provides enrollment assistance services at that location.

For each state you choose, select the counties in which your organization provides enrollment assistance services by using the arrows above the **Available Counties** list to move the applicable counties to the **Selected Counties** list. Remove selected counties by using the arrows above the **Selected Counties** list.

You may filter the list of counties by entering the county name in the **Filter** field.

Map of Marketplaces

State: Delaware

County/Parish:

Available Counties
Showing all 3

Selected Counties
Empty list

Kent
New Castle
Sussex

Figure 23: Service Locations Page State and County List

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

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



* **State:**
Delaware

County/Parish:

Available Counties
Showing all 3

Filter

→ → → ←

Kent
New Castle
Sussex

Selected Counties
Empty list

Filter

← ← ←

Figure 24: Service Locations Page Available Counties List

Step 5 The Selected Counties table will include all service locations your selected for the organization. Select **Update Table**.



* **State:**
 Delaware

County/Parish:

Available Counties
 Empty list

Selected Counties
 Showing all 3

Filter

Filter

Kent
 New Castle
 Sussex

Update Table

Figure 25: Service Locations Page Selected Counties List and Update Table Button

Step 6 Repeat steps 2 through 6 for each state in which your organization will provide enrollment assistance services.

Step 7 When edits are complete, select **Save & Return** to save your updates. The maintenance web form will return you to the “CDO Summary” page.

Service Locations

State	County
Delaware	Kent, New Castle, Sussex

Cancel Save & Return

Figure 26: Service Locations Page Save & Return Button



WARNING: *If you add or remove service location state(s), when you select Save & Return 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 C6. Replace Agreement](#) for instructions on how to generate and upload your updated CMS-CDO agreement.*

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

If you need to change service location information after submitting the CMS-CDO agreement, refer to the resources for Find Local Help:

- [FLH Upkeep Tool](#)
- [FLH Upkeep Tool User Guide](#)
- [FLH Upkeep Tool FAQs](#)

4. Additional Organization Information

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

Step 1 In the Additional Organization Information table of the “CDO Summary” page, select **Edit** to edit your additional organization information. The maintenance web form navigates to the “Edit Additional Organization Details” page.



Additional Organization Information

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

[Edit](#) ←

Figure 27: Additional Organization Information Table and Edit Button

Step 2 On the “Edit Additional Organization Details” page, update your information as needed for the following:

- Primary Organization Type
- Organization Specialty
- Enrollment Assistance Type
- Organization Processes

Step 3 When edits are complete, select **Save & Return** 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 ←

Figure 28: Edit Additional Organization Details Page Save & Return Button

5. Contact Information

The Edit Contact Information table allows you to review and/or edit information for your organization's contacts. CMS requires each organization to have an Organization Senior Official and a CDO Project Director. Though not a requirement, you may designate a third contact, referred to as the Secondary Contact.



5.1 Manage Contacts

To make changes to any of your organization’s contact information, select **Manage Contacts** in the Contact Information table of the “CDO Summary” page.

Contact Information

To edit contacts, select **Manage Contacts**

Organization Senior Official Information

First Name	Last Name	Email Address
User	Guide	useroso@email.com

CAC Project Director Contact Information

First Name	Last Name	Email Address
Cacpduser	Guide	usercacpd@email.com

[Manage Contacts](#) ←

Figure 29: Manage Contacts Button

5.2 Edit, Replace, or Move Contact

To edit a contact (e.g., an existing contact’s last name changes or their email address or phone number changed), replace a contact (e.g., an existing contact left the organization and someone else is taking their place), or move a contact to a different role, review the information on the “Edit Contact Information” page prepopulated with the Organization Contact Information on record.

- Step 1** Update any of the information shown for each contact on the “Edit Contact Information” page.
- Step 2** Select **Save & Return** either at the top or the bottom of the page. The maintenance web form will return you to the “CDO Summary” page.



Edit Contact Information

Instructions

You can edit a single contact or make multiple edits to the contacts listed by typing directly in the input fields. Select **Save & Return** once your edits are complete. Select **Submit** on the CDO Summary page to submit your changes.

Save & Return

Organization Senior Official

* First Name: <input type="text" value="User"/>	* Last Name: <input type="text" value="Guide"/>
* Email Address: <input type="text" value="useroso@email.com"/>	* Job Title: <input type="text" value="Director"/>
* Primary Phone: <input type="text" value="(555) 555-5555"/>	Primary Phone Extension: <input type="text"/>
Secondary Phone: <input type="text"/>	Secondary Phone Extension: <input type="text"/>
* Preferred Contact Method: <input type="text" value="Primary Phone"/>	

CAC Project Director

* First Name: <input type="text" value="Cacpduser"/>	* Last Name: <input type="text" value="Guide"/>
* Email Address: <input type="text" value="usercacpd@email.com"/>	* Job Title: <input type="text" value="Manager"/>
* Primary Phone: <input type="text" value="(555) 555-5555"/>	Primary Phone Extension: <input type="text"/>
Secondary Phone: <input type="text"/>	Secondary Phone Extension: <input type="text"/>
* Preferred Contact Method: <input type="text" value="Primary Phone"/>	

Secondary Contact

Add Secondary Contact

Cancel Save & Return

Figure 30: Edit Contact Information Page

5.3 Secondary Contact

To add a secondary contact:

Step 1 Select **Manage Contacts** in the Contact Information table of the “CDO Summary” page.



Contact Information

To edit contacts, select **Manage Contacts**

Organization Senior Official Information

First Name	Last Name	Email Address
User	Guide	useroso@email.com

CAC Project Director Contact Information

First Name	Last Name	Email Address
Cacpduser	Guide	usercacpd@email.com

Manage Contacts ←

Figure 31: Manage Contacts Button

Step 2- Select **Add Secondary Contact**.

Secondary Contact → **Add Secondary Contact**

Figure 32: Add Secondary Contact Button

Step 3 Enter the Secondary Contact information and select **Save & Return**.



Secondary Contact

* First Name:	<input type="text" value="First"/>	* Last Name:	<input type="text" value="Last"/>
* Email Address:	<input type="text" value="seccontact@email.com"/>	* Job Title:	<input type="text" value="Supervisor"/>
* Primary Phone:	<input type="text" value="(555) 555-5555"/>	Primary Phone Extension:	<input type="text"/>
Secondary Phone:	<input type="text"/>	Secondary Phone Extension:	<input type="text"/>
* Preferred Contact Method:	<input type="text" value="Primary Phone"/>		
<input type="button" value="Delete"/>			

←

Figure 33: Secondary Contact Information and Save & Return Button

Step 4 The maintenance web form returns you to the “CDO Summary” page, and the Secondary Contact table shows the Secondary Contact information you added.

To remove a Secondary Contact:

Step 1 Select **Manage Contacts** in the Contact Information table of the “CDO Summary” page.



Contact Information

To edit contacts, select **Manage Contacts**

Organization Senior Official Information

First Name	Last Name	Email Address
User	Guide	useroso@email.com

CAC Project Director Contact Information

First Name	Last Name	Email Address
Cacpduser	Guide	usercacpd@email.com

Secondary Contact Information

First Name	Last Name	Email Address
First	Last	seccontact@email.com

Manage Contacts ←

Figure 34: Secondary Contact Information and Manage Contacts Button

Step 2 Select **Delete** at the bottom of the Secondary Contact table.



Figure 35: Secondary Contact Delete Button

Step 3 The “Edit Contact Information” page will no longer list anything in the Secondary Contact table. When edits are complete, select **Save & Return**.

Figure 36: Edit Contact Information Save & Return Button

Step 4 The “CDO Summary” page will refresh and will no longer list anything in the Contact Information table for a secondary contact.



Contact Information

To edit contacts, select **Manage Contacts**

Organization Senior Official Information

First Name	Last Name	Email Address
User	Guide	useroso@email.com

CAC Project Director Contact Information

First Name	Last Name	Email Address
Cacpduser	Guide	usercacpd@email.com

Manage Contacts

Figure 37: CDO Summary Page Contact Information

WARNING: If you change your Organization Senior Official contact, when you select Save & Return 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 C6. Replace Agreement](#) for instructions on how to generate and upload your updated CMS-CDO agreement.

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

6. Replace Agreement

If you made changes to the Organization Name, Operating State, and/or Organization Senior Official’s name 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:



Step 1 In the Agreement PDF table on the “CDO Summary” page, select **Replace**.

Warning! Your Organization's CMS-CDO agreement is out of date. You must generate an up-to-date CMS-CDO agreement with the most current changes and submit a CMS-CDO agreement signed and dated by the Organization Senior Official of the CDO for CMS review. Use the links in the Agreement PDF table below to update your organization's CMS-CDO agreement.

Agreement PDF

Action	File Name	Upload Date	CDO ID	Approval Date	Expiration Date
Replace View	CDO_Agreement (2).pdf	6/30/2021 12:30 PM	DECD0A05	6/30/2021	6/30/2023

Figure 38: Warning Message and Agreement PDF Table Replace Link

Step 2 A pop-up will appear asking if you need to make any changes to your information before you proceed to uploading an agreement. Select **OK** to proceed to upload your agreement. Select **Cancel** to stay on the “CDO Summary” page and change your information or add your CAC roster as needed.

uat-mats.cs32.force.com says

Please update your organization's information as needed before uploading a signed CMS-CDO agreement. Select the Ok button to proceed to the Attestation and Agreement Upload page to upload a CMS-CDO agreement signed and dated by the Organization Senior Official of the CDO. Select the Cancel button to stay on the CDO Summary page and update your organization's information.

↓

Figure 39: Warning Message for Agreement Replace Link and OK Button

Step 3 Select **Print PDF Agreement**. 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 40: Print PDF Agreement Button

Step 4 Return to the maintenance web form window in your internet browser.

You must upload all pages of your signed agreement, including the COI Attestation form beginning on page 13, but you do NOT have to upload Appendix A. You have two options for when to upload your signed agreement. You can:



- Keep the maintenance web form open, obtain your Organization Senior Official’s signature, and return to the maintenance web form within 60 minutes; or
- Exit the maintenance web form, obtain your Organization Senior Official’s signature, and log back into the maintenance web form later.

Refer to Table 3 for instructions for each option.

Table 3: 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"> 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. 2. Refer to Section C1 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.
You want to return to the maintenance web form to upload your up-to-date agreement	<ol style="list-style-type: none"> 1. On the “Attestation and Agreement Upload” page, select Cancel (refer to Figure 41). 2. At the bottom of the “CDO Summary” page, select Exit (refer to Figure 42). 3. Outside of the maintenance web form, obtain your Organization Senior Official’s signature on the updated CMS-CDO agreement. 4. Return to the maintenance web form and refer to Section C1 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.

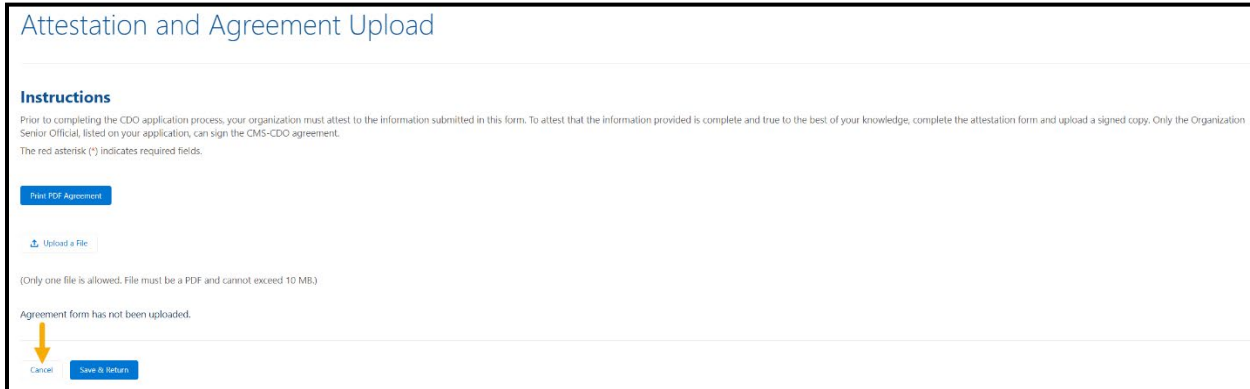


Figure 41: Attestation and Agreement Upload Page Cancel Button

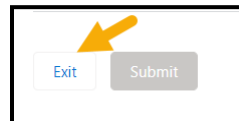


Figure 42: CDO Summary Page Exit Button

D. 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.

Step 1 Select **Print PDF** 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 a formal 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.

Agreement Submission End Time: 7/1/2021 9:51 AM

An acknowledgment email has been sent to the following contacts:

usercpcpd@email.com
useroso@email.com

Print/Save

Select **Print PDF** 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 43: Confirmation Page Print PDF Button

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

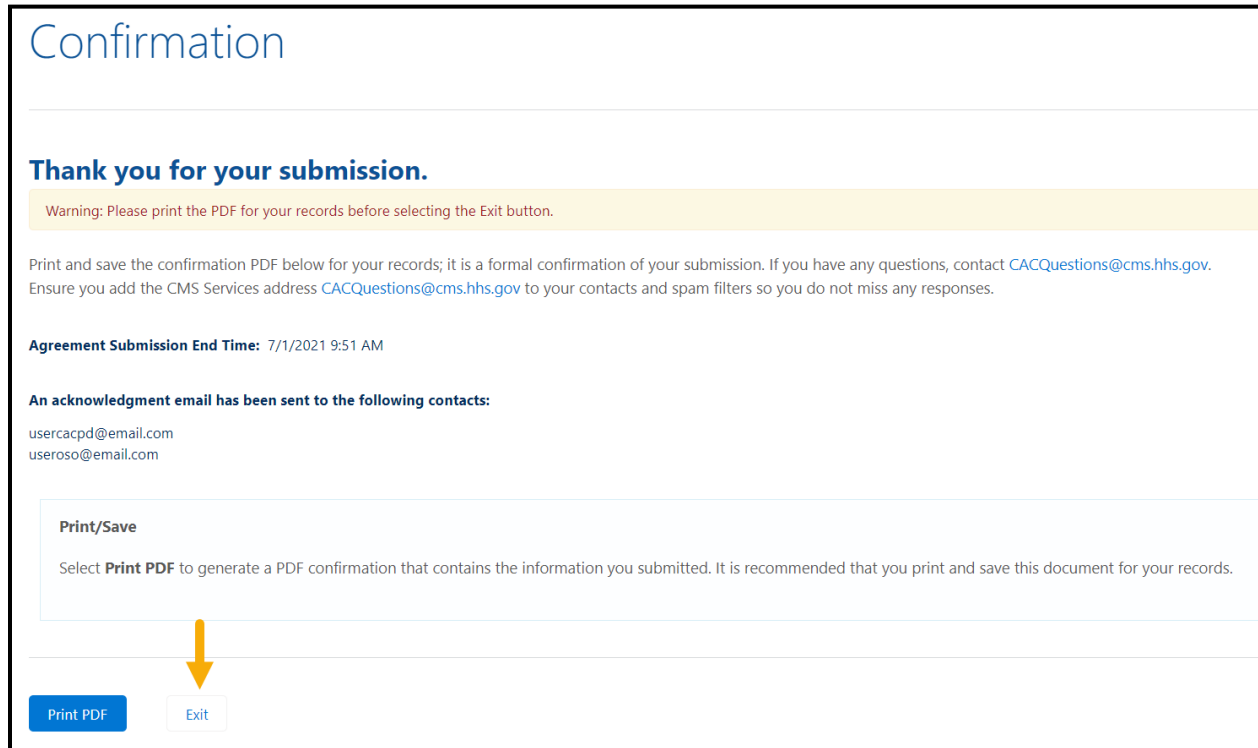


Figure 44: Confirmation Page Exit Button

E. Active CAC Roster

CMS requires that CDOs add a roster of their active CACs using the maintenance web form.

This is a required component to your CDO record with CMS during your two (2)-year agreement period. This 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.

As an active CDO, you must assign unique IDs to each of your CACs and monitor 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 leadership contacts can access the maintenance web form and complete these actions.



You can access additional training materials, FAQs, and videos that describe how to complete the CAC roster on the [CDO Program web page](#). This includes:

- [CDO Learning Series – CAC Roster video](#) – discusses the process for CDOs to add, update, and decertify CACs for the CAC roster.
- [CDO Organizational Maintenance Web Form Demonstration video – 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.
- [CDO Organizational Maintenance Web Form Troubleshooting FAQs](#) – contains frequently asked questions (FAQs) about how and when to use the maintenance web form, including the CAC roster.

You can access additional information for active CDOs, including information about the CDO renewal requirement, the CAC roster, and how to maintain CDO information during the agreement period, at [Information for active CDOs](#).

***NOTE:** Maintaining a roster of active CACs using the maintenance web form is necessary for CACs to access annual certification training on the MLMS. In the MLMS, the CAC ID is verified against your organization's CAC Roster before CACs can enroll in their training courses on the MLMS.*

1. Preparing for the CAC Roster

To prepare to upload your CAC roster:

- Step 1** Make sure your leadership contacts can access the maintenance web form.
- Step 2** Ensure every CAC has a unique ID. For guidance on assigning CAC ID, review the [How to Assign Unique CAC IDs document](#).
- Step 3** Gather all the necessary CAC data and have it readily available to complete all the information for the roster:
- First Name (exactly as it appears in MLMS/CMS Portal)
 - Last Name (exactly as it appears in MLMS/CMS Portal)
 - Email Address
 - Current CAC ID — e.g., USCDOZ9912345, a maximum of 13 characters in length
 - Previous CAC ID — (if applicable) any other ID a CAC has held with previous organizations or your organization that is no longer in use (this is not a required field)

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 for each CAC individually (you can add up to five CACs per session with this method).
2. Using a CMS-provided template to collect information for as many CACs as you need to add at one time and upload it to the maintenance web form.

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.

To add your roster of CACs:

Step 1 Select **Add CAC Roster**.



Figure 45: Add CAC Roster Button

Step 2 On the “CAC Roster Upload” page, review the Instructions.



CAC Roster Upload

Instructions

- Prior to adding your CAC Roster, collect the following information for each of your CACs:
 - first name
 - last name
 - email address
 - current CAC ID
 - previous CAC ID (optional)
- For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>.
- Required fields are indicated with a red asterisk (*).

Figure 46: CAC Roster Upload Page Instructions

NOTE: You can manually add up to five CACs per session 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 may find it most helpful to use it if you have more than five CACs.

2.1 Manual Process

Using the manual upload functionality on the maintenance web form, you can add up to five CACs individually in a single session. You can exit the maintenance web form and log back in to add another five CACs as many times as you want if you prefer the manual upload method.

To begin the manual upload process:

- Step 1** Select **Manual Upload** on the “CAC Roster Upload” page, and 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.



CAC Roster Upload

Instructions

- Prior to adding your CAC Roster, collect the following information for each of your CACs:
 - first name
 - last name
 - email address
 - current CAC ID
 - previous CAC ID (optional)
- For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>.
- Required fields are indicated with a red asterisk (*).

Select which upload option you are going to use.

Figure 47: Manual Upload Button on CAC Roster Upload Page

Step 2 Enter the information indicated by a red asterisk. The Previous CAC ID field is optional.

Step 3 Select **Save** if only adding one CAC, or **Save and New** if adding multiple CACs.

CAC Roster Manual Upload

Please complete the fields below to populate your CAC Roster.

CAC #1

* First Name:	* Last Name:
<input type="text"/>	<input type="text"/>
* Email Address:	
<input type="text"/>	
* Current CAC ID:	Previous CAC ID: ⓘ
<input type="text"/>	<input type="text"/>

Figure 48: CAC Roster Manual Upload Page

Step 4 The CAC Roster Summary Table will appear displaying the information you just entered. Review the information carefully and select **Save and Return**.



CAC Roster Summary Table

Certification Status	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID @
			Test	Nine	testnine@email.com	DECDOA0500009	
			Test	Seven	testseven@email.com	DECDOA0500005	

Cancel Save and Return

Figure 49: CAC Roster Summary Table Save and Return Button

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 within 24 hours of completion.

Step 5 The “CDO Summary” page will appear. Your CAC table will now display the CAC(s) you added. To submit your roster, select **Submit** either at the top or the bottom of the “CDO Summary” page.

Certified Application Counselors (CACs)

Action	Certification Status	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID @
Edit Decertify				Test	Eleven	testelevn@email.com	DECDOA0500011	
Edit Decertify				Test	Nine	testnine@email.com	DECDOA0500009	
Edit Decertify				Test	Seven	testseven@email.com	DECDOA0500005	

Add CAC Roster Download My Current CAC Roster

Exit Submit

Figure 50: CAC Roster Submit Button

Step 6 The “Confirmation” page will appear. You can select **Print PDF** to print a copy of your information.

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

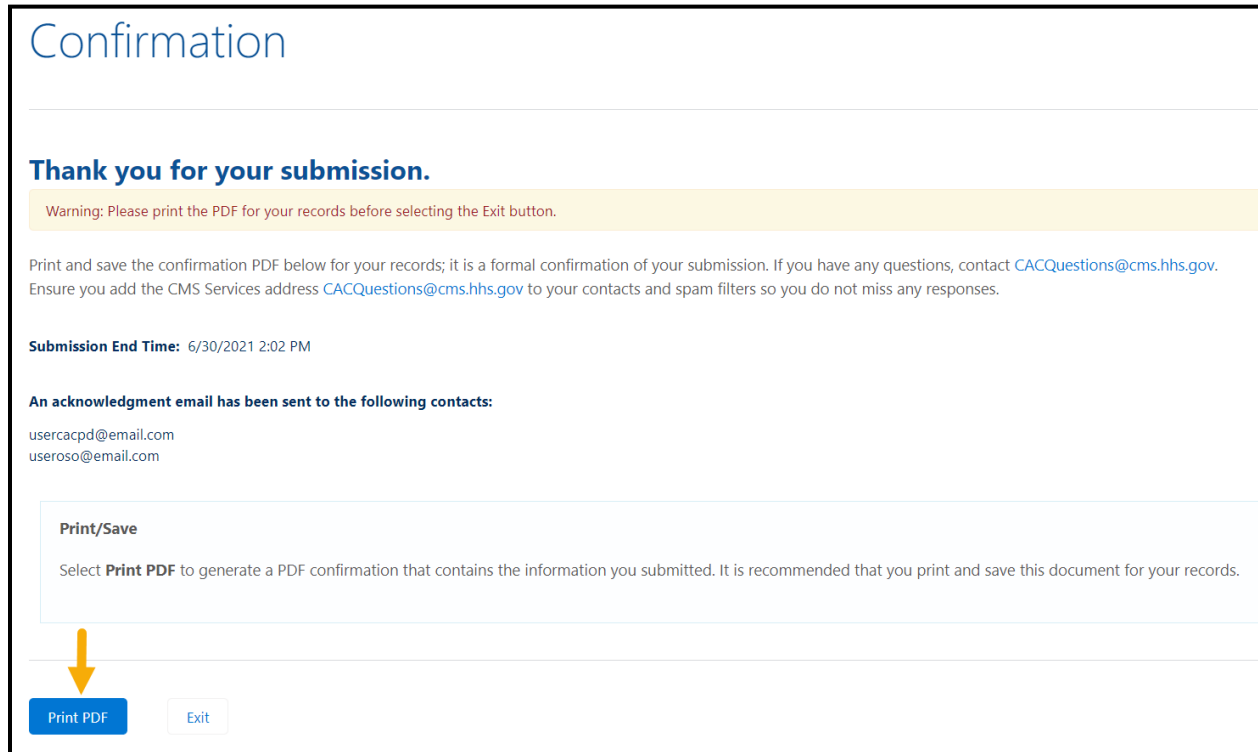


Figure 51: Confirmation Page Print PDF and Exit Buttons

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:

- Follow all the instructions on the initial Instructions Tab and the CAC Roster tab.
- Make sure to select **Enable Editing** and **Enable Content** 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.
 - 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.

NOTE: You cannot reuse your existing CAC Roster when making additions to your roster. You must use a clean version of the CAC Roster template when adding additional CACs to your roster.

Step 1 Select **CAC Roster Template** on the “CAC Roster Upload” page.

CAC Roster Upload

Instructions

- Prior to adding your CAC Roster, collect the following information for each of your CACs:
 - first name
 - last name
 - email address
 - current CAC ID
 - previous CAC ID (optional)
- For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>.
- Required fields are indicated with a red asterisk (*).

Select which upload option you are going to use.

CAC Roster Template Manual Upload

Figure 52: CAC Roster Template Button

Step 2 Select **CAC Roster Template** on the “CAC Roster Template Upload” page to open and create your CAC roster file. The CAC roster template will open on the instructions page. Review the instructions before you continue.



CAC Roster Template Upload

Instructions

- Prior to adding your CAC Roster, collect the following information for each of your CACs:
 - first name
 - last name
 - email address
 - current CAC ID
 - previous CAC ID (optional)
- For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>.
- Required fields are indicated with a red asterisk (*). Download and populate the CAC Roster template.
- Return to this page and upload your CAC Roster template following the instructions in the Upload section.

Tips for the CAC Roster Template:

- There are two tabs: **Instructions** and **Roster**. The instructions tab provides guidance on what information is needed, and the CAC Roster tab provides templates for CDOs to collect the necessary information.
- You must select the **Enable Editing** button and then select the **Enable Content** button at the top of this template to proceed.
- If copying and pasting from another spreadsheet, remove any extra spaces that may have carried over BEFORE creating the CSV file.

To Start: Select the link to download a [CAC Roster Template](#) to create your .csv file.

Figure 53: CAC Roster Template Upload Page

Step 3 Select your file in the lower left corner tab of your screen.

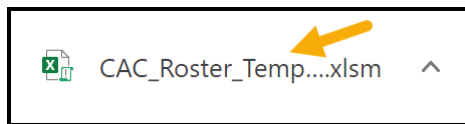


Figure 54: CAC Roster Template

Step 4 Select **Enable Editing**.

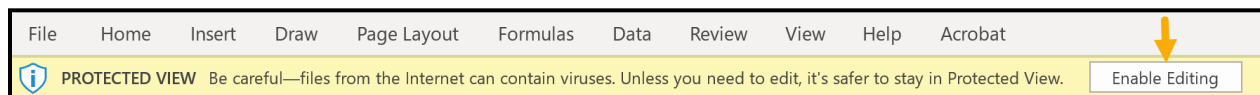


Figure 55: Enable Editing Button

Step 5 Select **Enable Content**.

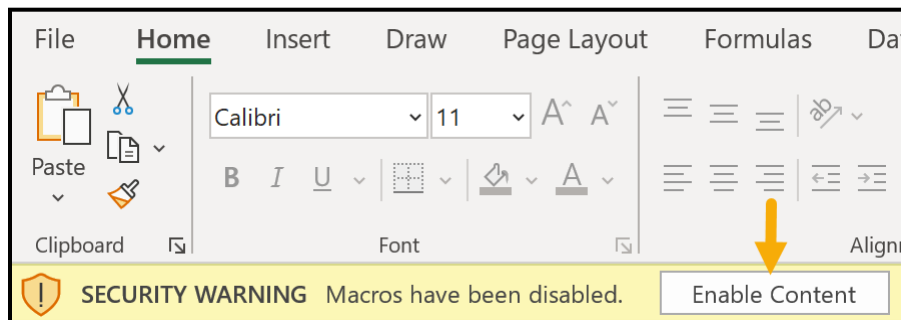


Figure 56: Enable Content Button

Step 6 Review the information on the Instructions tab.



Certified Application Counselors (CAC) Roster Template

Overview: 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 CAC information.

How to use this template:

- 1. Instructions Tab** - Contains instructions and guidance on how to complete the form.
- 2. CAC Roster Tab** - Provides a template for CDOs to collect CAC information and generate a CSV file for upload to the CDO Organizational Maintenance web form.

Note: You must select **Enable Editing** and then select **Enable Content** at the top of this template to proceed.

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.

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., USCDOZ0012345), a maximum of 13 characters in length. This is a required field.
Previous CAC ID	Enter the CAC's previous ID (if applicable).

> **Instructions** CAC Roster

Figure 57: CAC Roster Template Instructions

Step 7 Select the **CAC Roster** tab (bottom of the excel sheet).



Figure 58: CAC Roster Tab

Step 8 Start on row 11 and enter the information indicated by a red asterisk. The Previous CAC ID is only if applicable and is optional.

	A	B	C	D	E	F
1		Certified Application Counselors (CAC) Roster Template				
2		Using the CAC Roster:				
3		<ol style="list-style-type: none"> 1. You must select Enable Editing and then select Enable Content at the top of this template to proceed. 2. Have all of the necessary data for your CAGs available to complete the roster. 3. Select Add CAC to add new lines to the roster below row 11 if adding more than one CAC. 4. Enter data for all required (*) fields. 5. Select Create CAC Roster to generate the CSV file to be uploaded through the web form. 				
4		Add CAC				
5		Create CAC Roster				
6		<p>Note: 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.</p>				
7		<p>Note: Once you save the file, this template will remain open. Using your browser, navigate to the CDO Organizational Maintenance web form. Upload the CSV file you saved as CACRosterUpload to the web form.</p>				
8						OPTIONAL
9						
10		↓	↓	↓	↓	
11	Delete	First Name*	Last Name*	Email Address*	Current CAC ID*	Previous CAC ID

Figure 59: CAC Information Fields

NOTE: The First Name AND Last Name on your roster must match the CAC's information on their Centers for Medicare & Medicaid Services (CMS) Portal Account EXACTLY. If the CMS Portal Account has a middle name, just omit. The CAC Roster does not have a middle name field.



Step 9 Select **Add CAC** to add your next CAC.

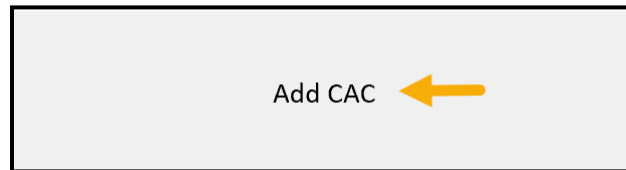


Figure 60: Add CAC Button

Step 10 If you have multiple CACs to add, you can select **Add CAC** as many times as necessary. You can copy and paste CAC information from another document into the cells.

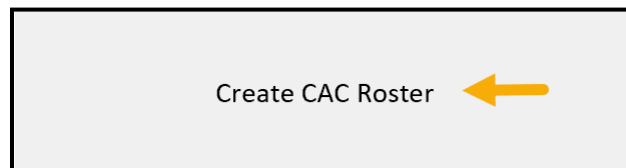


Figure 61: Create CAC Roster Button

Step 11 Select **OK**.

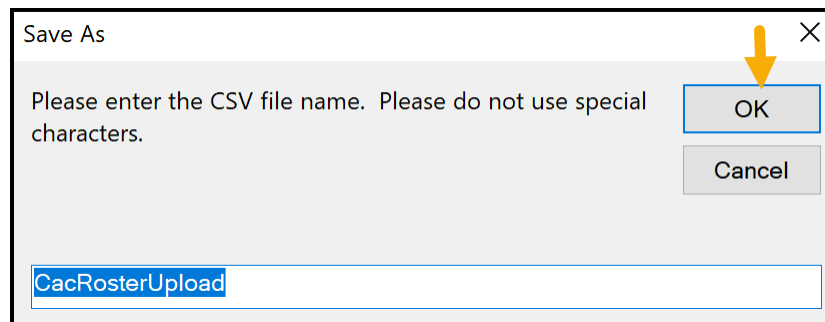


Figure 62: Save As Window OK Button

Step 12 Select the location where to save the file and select **OK**.

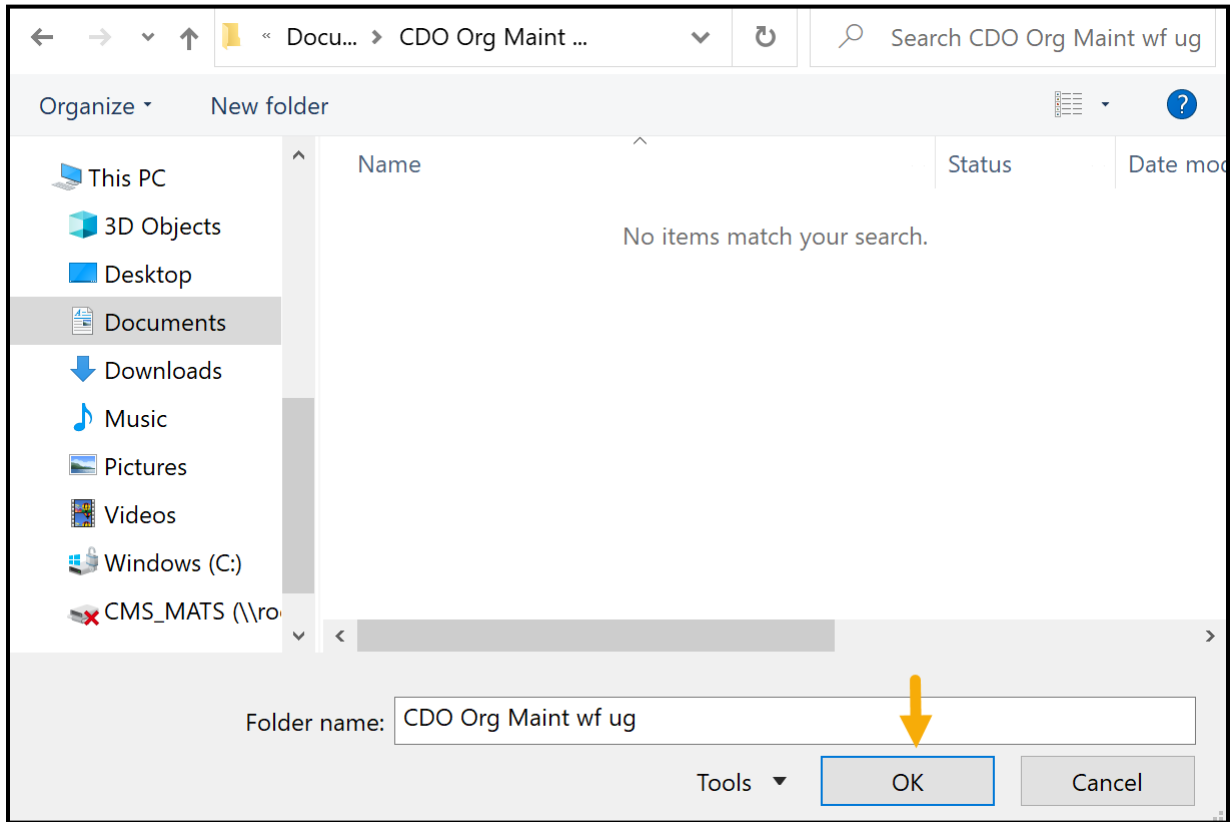


Figure 63: Location Saving OK Button

Step 13 A pop-up will appear confirming that the CAC roster CSV file saved. Select **OK**.

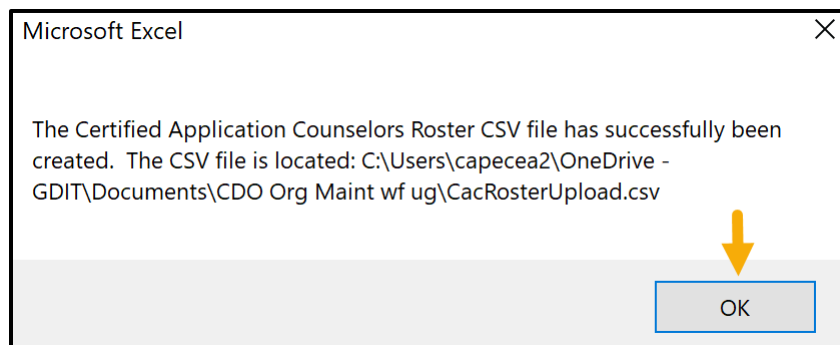


Figure 64: Location Save Pop-up Window OK Button

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



Step 14 On the “CAC Roster Template Upload” page, in the CAC Roster Template Upload section, select **Upload a File**. Locate and select the CSV file you just created and saved on your computer. Select **Save and Return**.

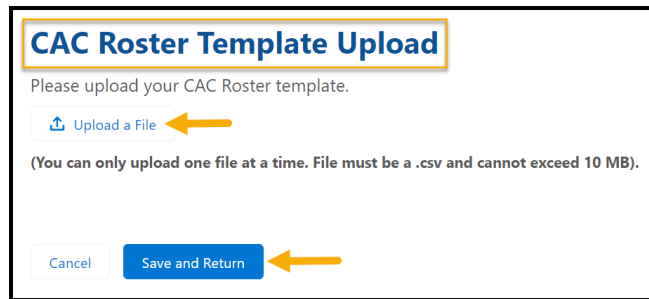


Figure 65: Upload a File Link and Save and Return Button

Step 15 Your CAC roster file will show in the Attachment Summary table. Select **Save and Return**.

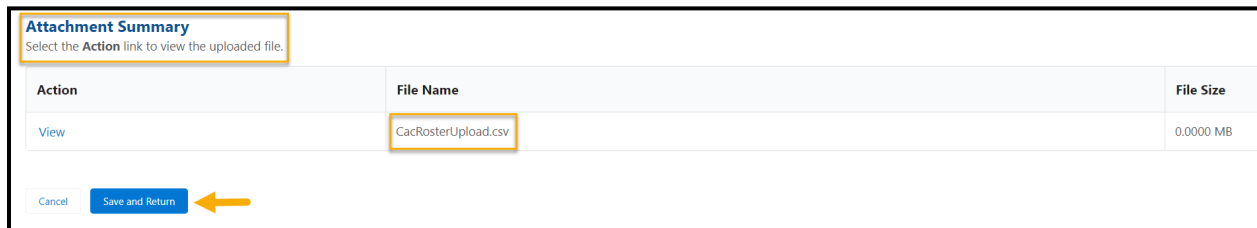


Figure 66: CAC Roster Attachment Summary and Save and Return Button

Step 16 On the “CDO Summary” page, the CAC table now displays the CAC you added. Select **Submit** to submit your roster.

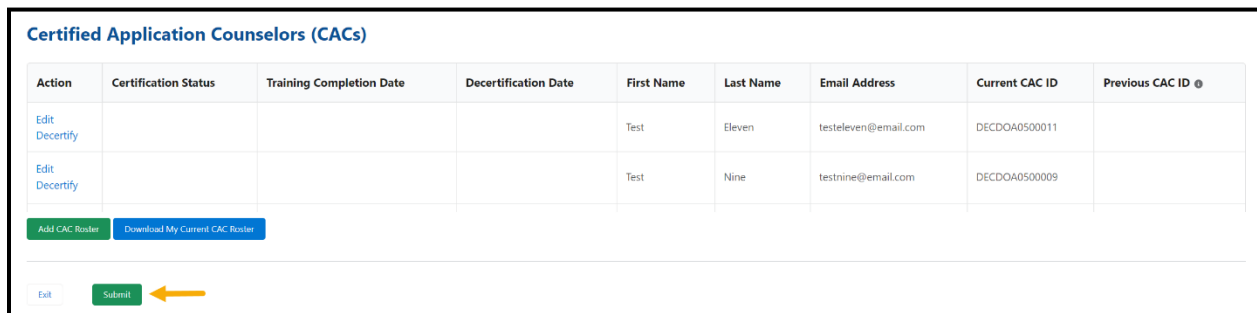


Figure 67: CAC Table and Submit Button

Step 17 On the “Confirmation” page, select **Print DF** to print a copy of your information. Select **Exit** to return to the maintenance web form “Welcome” page.

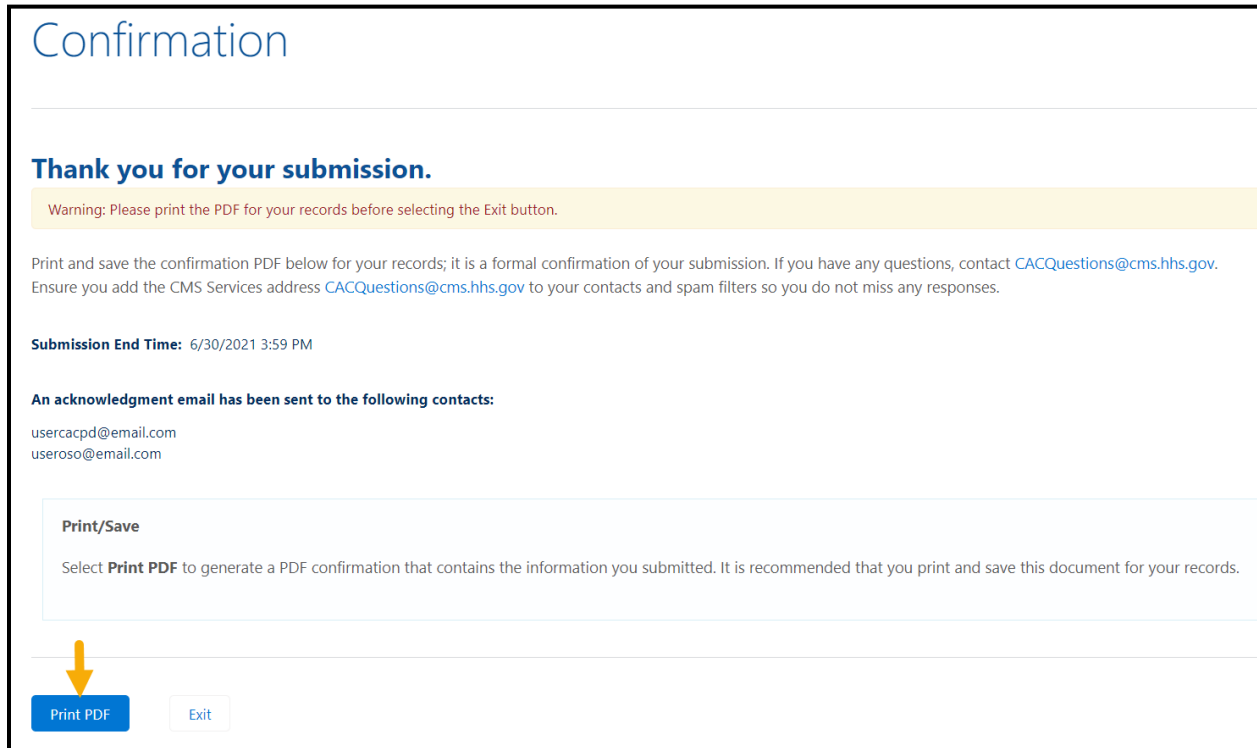


Figure 68: Confirmation Page and Print PDF Button

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.

NOTE: You cannot reuse your existing CAC Roster when making additions to your roster. You must use a clean version of the CAC Roster template when adding new CACs to your roster.

To download a copy of your CAC Roster:

- Step 1** Log in to the maintenance web form.
- Step 2** In the Certified Application Counselors (CACs) table of the “CDO Summary” page, select **Download My Current CAC Roster**.



Certified Application Counselors (CACs)

Action	Certification Status	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
Edit Decertify				Test	Eleven	testeleven@email.com	DECDOA0500011	
Edit Decertify				Test	Nine	testnine@email.com	DECDOA0500009	
Edit Decertify				Test	Seven	testseven@email.com	DECDOA0500005	

[Add CAC Roster](#)
[Download My Current CAC Roster](#)

Figure 69: CAC Download My Current CAC Roster Button

Step 3 Open your file from the lower left corner tab of your screen.

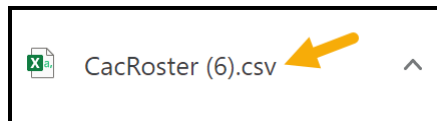


Figure 70: CAC Roster CSV File Tab

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H
1	Training Co	Decertifica	First Name	Last Name	Email Addr	Current CA	Previous CAC ID	
2			CAC	One	cacone@er	DECDOA0500001		
3			CAC	Two	cactwo@er	DECDOA0500002		

Figure 71: CAC Roster Excel File

Step 4 Save your file to a location of your choice.

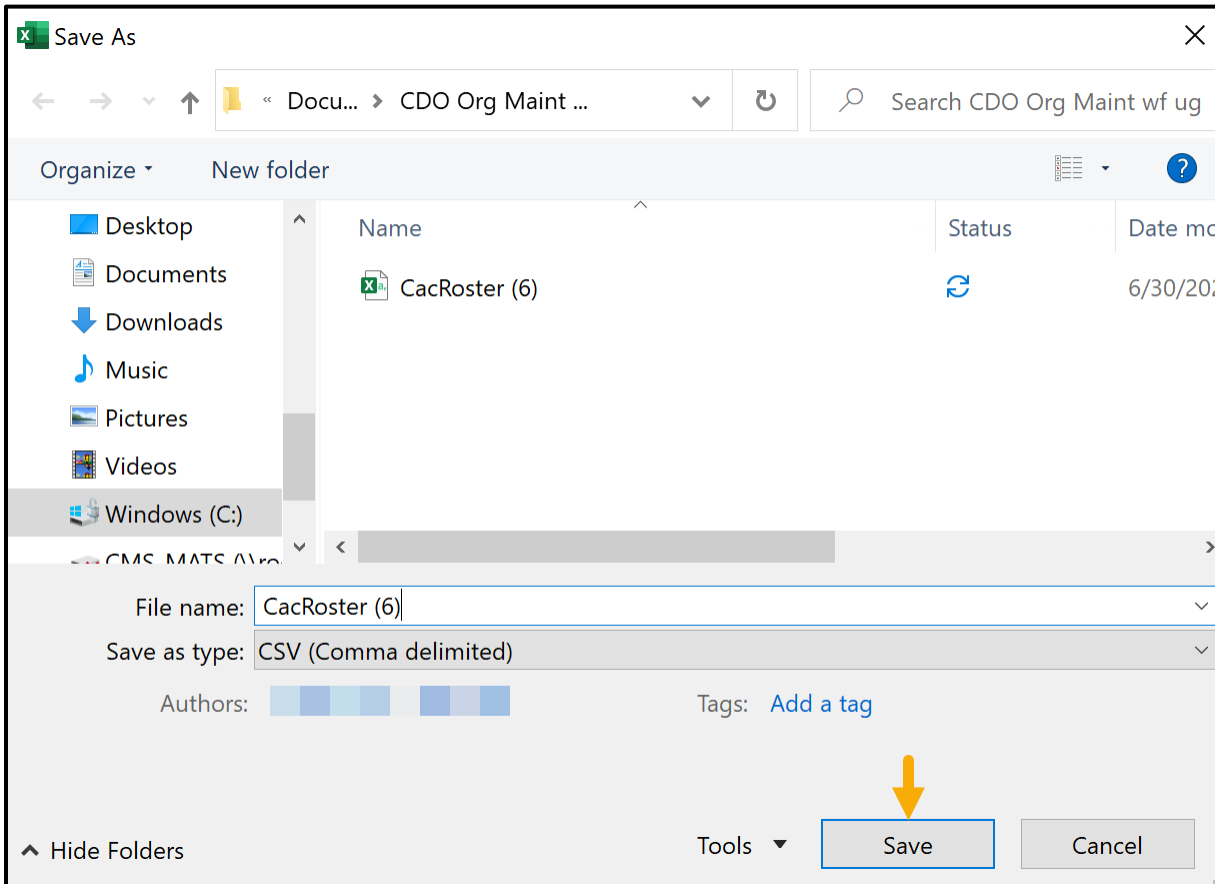


Figure 72: File Location Save Button

Step 1 Once you download your CAC roster, return to the maintenance web form in your browser to continue.

4. Decertifying CACs

During your two-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 CAC with your organization.

You can use the maintenance web form to document these changes by decertifying the CACs who leave your organization.

Step 1 On the “CDO Summary” page, in the CAC table, identify the individual you want to decertify.

Step 2 Select **Decertify**.



Certified Application Counselors (CACs)								
Action	Certification Status	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID ⓘ
Edit Decertify				Test	Eleven	testeleven@email.com	DECDOA0500011	

Figure 73: Decertify Link

Step 3 The system will confirm that you want to decertify the individual. Select **OK**. Once you select **OK**, this **action cannot be cancelled or undone**. You will need to add the CAC back with a new CAC ID following steps in the previous sections.

***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**.*

Do you want to decertify this contact?

Figure 74: Decertify Pop-up Window OK Button

Step 4 The system will update the CAC 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)								
Action	Certification Status	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID ⓘ
Edit Decertify				Test	Nine	testnine@email.com	DECDOA0500009	
			10/07/2021	Test	Eleven	testeleven@email.com	DECDOA0500011	

Figure 75: CAC Roster Table

Step 5 Confirm the information is correct, make additional changes if needed, and select **Submit**.

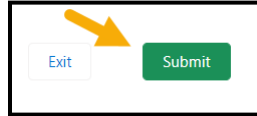


Figure 76: Submit Button

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:

Step 1 Navigate to the CAC table on the “CDO Summary” page and select **Edit**.

Certified Application Counselors (CACs)								
Action	Certification Status	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID ☺
Edit Decertify				Test	Eleven	testeleven@email.com	DECDOA0500011	

Figure 77: 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.*

Step 2 On the “CAC Contact Edit” page, you can edit the individual’s Last Name and/or Email Address. Once you make your changes, select **Save & Return**.



Figure 78: CAC Contact Edit Fields and Save & Return Button

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**.

Step 3 On the “CDO Summary” page, your edits will appear in the CAC table. Confirm your changes and select **Submit**. The “Confirmation” page will appear where you can download a copy of your submission and exit the maintenance web form.

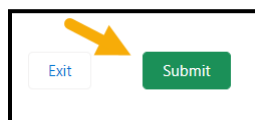


Figure 79: Submit Button

F. Active CDO Renewal

CMS certifies CDOs on a specific timeframe, typically two years. To renew your CDO agreement, one of your leadership contacts (Organization Senior Official, CAC Project Director, or 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.



NOTE: Your leadership contacts will be able to renew starting 30 calendar days prior to your organization’s expiration date. Your leadership contacts can renew any time during that 30-day window but **must** renew the CMS-CDO agreement by your organization’s expiration date.

Agreement PDF						
Action	File Name	Upload Date	CDO ID	Approval Date	Renewal Opens	Expiration Date
View	01021 CDO_Agreement (5).pdf	9/22/2021 12:52 PM	DECDOA05	6/30/2021	6/1/2023	6/30/2023

Figure 80: Expiration Date on the CDO Summary Page of the Maintenance Web Form

To review and update your organization’s information, refer to [Section C](#).

To replace your existing CMS-CDO agreement with new signed and dated agreement, refer to [Section C6](#).

G. Next Steps

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.

Your organization needs to:

- Submit your signed CMS-CDO agreement.
- Maintain administrative data on CDO headquarter location, service locations, leadership contacts information, etc.
- Certify your CAC staff and maintain your CAC Roster per Section II, paragraphs 1 through 4 (Obligations and Conditions) of the CMS-CDO agreement.
- Monitor CAC annual certification data from the MLMS.
- Keep your CDO information current per Section II, paragraphs 5 and 6 (Obligations and Conditions) of the CMS-CDO agreement.
- Renew your signed CMS-CDO agreement.

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 leadership contacts can then access the maintenance web form to upload and maintain your organization's CAC roster.

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 leadership contacts or CACs
- Service locations
- Enrollment assistance type (open enrollment only or year-round)
- Specialty areas

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

If you change your Organization Name, Organization Senior Official's name, and/or your Operating State, the maintenance web form will prompt you to upload a new signed and dated CMS-CDO agreement.

3. Renewing Your CMS-CDO Agreement

Per Section IV.1 (Effective Date and Term) of the CMS-CDO agreement, existing CDOs complete a renewal application within the timeframe communicated by CMS, typically two years from your effective date, by reviewing existing organization information and uploading a renewal agreement.

You can find your expiration date on the "CDO Summary" page of the maintenance web form, or you can email 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 during the open application season because 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.

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:

- Step 1** Send a formal written request to CMS at CACQuestions@cms.hhs.gov. The written request should include your CDO ID and the date when your CMS-CDO agreement should terminate.
- Step 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 CDO or as a CAC, respectively, after the effective date of termination.



- Step 3** Appropriately secure and retain for six 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).
- Step 4** Submit a request to remove your organization's listing(s) from [Find Local Help](#).