

# CDO Organizational Maintenance Web Form – Video Transcript

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## **CDO Learning Series**

**This document is a transcript for the CDO Learning Series.**

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## Welcome to CDO OMWF Technical Demonstration

Hello! Welcome to the Certified Application Counselor Designated Organization (CDO) Organizational Maintenance Web Form (OMWF) technical demonstration!

### CDO OMWF Overview

Leadership contacts (Organization Senior Official, CAC Project Director, or Secondary contacts) will use the maintenance web form to:

- Complete the Certified Application Counselor Designated Organization (CDO) application process by reviewing and submitting the signed CMS - CDO agreement.
- Renew their agreement 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 the Conflict of Interest (COI) Attestation form.
- Maintain up-to-date administrative data on CDO information such as headquarter location, service locations, designated contacts information, etc.
- Make updates to the Operating State, Organization Name, or Organization Senior Official's name. Note: if they update Operating State, Organization Name, or Organization Senior Official's name, they must execute a new agreement with CMS reflecting these updates.
- Provide updates to the Service Location(s) or Headquarters Address. If they update the Service Location(s) or Headquarters Address, CMS will acknowledge these changes through an amendment to the organization's record. CMS will provide written confirmation of this amendment to the previously signed agreement.
- Submit and maintain a roster of Certified Application Counselors (CAC's). It is a requirement of the program 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, leadership contacts can access the maintenance web form to keep information up to date with CMS.

**NOTE:** 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.

### CDO OMWF Overview - continued

New applicants can access the maintenance web form only after receiving a preliminary approval email from C-M-S upon approval of their C-D-O application.

Moving forward, leadership contacts can access the maintenance web form to keep information up to date with C-M-S.

Note: Leadership contacts must use the email address entered on their C-D-O Application when logging into the maintenance web form.

## CDO OMWF Welcome Page

After approving the application, CMS sends an email to the organization's leadership contacts with a link to the maintenance web form. A leadership contact will select the link and be taken to the "Welcome" page to the maintenance web form.

## Create Access Code (First Log-In)

The first time a leadership contact accesses the maintenance web form, they will need to create an access code (password).

To create an access code:

Select **Create Access Code** on the "Welcome" page.

## Create Access Code Continued

- They will then enter their email address exactly as it appears on the C-D-O application.
- The leadership contact then:
- Creates and enters an **Access Code** that meets the requirements listed.
- And Confirms the **Access Code** by entering it again.
- **NOTE:** The leadership contact should notate the access code and keep it in a secure place, as this code will be used to log into the maintenance web form each time.
- The leadership contact then:
- Selects two **security questions** and enters the corresponding **responses** to each, and
- Selects **Continue** to proceed.

## Create Access Code - Confirmation

The maintenance web form will direct the leadership contact to the "Access Code Confirmation" page.

On the "Access Code Confirmation" page, they select **Continue**.

The maintenance web form returns them to the login page.

## Existing Access Code

If the leadership contact already has an access code, they proceed to “I have an access code” on the “Welcome” page.

The leadership contact then:

- Enters their **Login ID** (i.e., their email address on record);
- Enters their **Access Code**; and
- Selects **Login**.

## Forget Access Code - Link

If the leadership contact forgot their access code, they select the **Forgot Access Code** link on the “Welcome” page.

## Forget Access Code - PIN Request

On the “**Forgot Access Code**” page, the leadership contact enters their **email address** on record.

Then they:

- Select **Send PIN**. The maintenance web form will send a PIN to the **email address on record**. The PIN expires in 24 hours.

## Forget Access Code - PIN Received

Once they receive a six-digit PIN, they return to the maintenance web form.

The leadership contact then:

- Selects the **Forgot Access Code** link on the “Welcome” page;
- Enters the **email address** and **PIN** on the “Forgot Access Code” page; and
- Selects **Continue**.

The maintenance web form takes them to the “Reset Access Code” page.

## Forget Access Code - Reset Access Code

On the “Reset Access Code” page, the leadership contact creates and enters an **Access Code** that meets the requirements.

Then they:

Confirm the **Access Code** by entering it again;

Enter the **corresponding responses** to each of the previously established security questions; and

Select **Continue** to proceed.

## Forget Access Code - Reset Confirmation

On the “Access Code Reset Confirmation” page, the leadership contact selects **Continue**.

The maintenance web form returns them to the login page where they will log in with their newly created access code.

## CDO Summary Page

Once logged into the maintenance web form, the organization will land on the “CDO Summary” page. This page allows the organization to review and/or edit the organization’s information, update the CAC roster, and upload the signed agreement.

Any updates made during the session will be documented in the CDO Submissions Summary which is available by selecting **View All Submissions** on the CDO Summary Page.

CMS encourages CDOs to review and update all the organization’s information (addresses, contacts, service area(s), CAC roster etc.) **before** uploading the agreement. Once an agreement is submitted, the maintenance web form will lock down, and the leadership contact will not be able to make any updates while the agreement is under review.

## CDO Summary Page (Cont.)

The maintenance web form prompts when the agreement needs updating.

C-M-S needs a new agreement signed by the Organization Senior Official if:

- C-M-S recently approved a C-D-O application and does not have a signed agreement on file yet for the organization.
- The leadership contact made changes to the organization’s information that affects the agreement. These changes include Operating State, Organization Name, or Organization Senior Official’s name.
- Or The C-M-S-C-D-O agreement has expired.

## Summary Page Selections

Each section on the “CDO Summary” page represents a section of the CDO application web form.

- If a Leadership Contact Wants To: Generate a new copy of the agreement, then they go to Agreement PDF table.
- If a Leadership Contact Wants To: Review and or edit their organization’s headquarters information, then they go to Organization Headquarters information.
- If a Leadership Contact Wants To: Review and or edit their organization’s service locations, then they go to Service Locations Table.
- If a Leadership Contact Wants To: Review and or edit their organization’s additional details, then they go to Additional Organization Information.
- If a Leadership Contact Wants To: edit or replace the contact information for one or more of their organization’s contacts, then they go to Contact Information.
- If a Leadership Contact Wants To: view and or replace their CMS CDO signed agreement, then they go to Replace agreement.

## Agreement PDF Table

The Agreement PDF table includes links that allow a leadership contact to add, view, or replace their signed agreement as needed. If they are on this page for the first time, they will have only one link to add their agreement.

The leadership contact then:

- Selects **Add**;
- Uploads all pages of their **signed agreement**; and
- Selects **Upload a File**.

## Attestation and Agreement Upload

In the pop-up window, the leadership contact navigates to the place where they saved the PDF version of their signed agreement on their computer and selects the **file**.

The maintenance web form returns them to the “Attestation and Agreement Upload” page.

The leadership contact then selects **View** to open their file. If the agreement did not upload, the maintenance web form will display a warning message.

Then they’ll select **Save & Return** to return to the “CDO Summary” page.



## CDO Summary – Submit Agreement

On the “CDO Summary” page, the leadership contact selects Submit at the top or the bottom of the page to submit their CMS-CDO agreement.

**WARNING:** While an agreement is under review by CMS, the organization’s account is **locked**, and they will be unable to edit their information, including their CAC roster. After receiving a response email, their account will be unlocked again, and they will then be able to edit the organization’s information or CAC Roster using the maintenance web form.

The “Confirmation” page provides a summary of their session and allows them to print and save a PDF confirmation containing the information they submitted. CMS recommends that they print and save this confirmation for their records. They will only be able to access this confirmation at the end of their session. The confirmation does not save, and they cannot return to save and print it later.

The leadership contact selects **Print PDF** to generate a PDF confirmation.

## Organization Headquarters Information

The “Organization Headquarters Information” section allows a leadership contact to review and/or edit the organization’s headquarters information.

In the Organization Headquarters Information table of the “CDO Summary” page, they can select **Edit** to update the organization headquarters information if necessary. The maintenance web form will take them to the “Edit Organization Headquarters Information” page.

## Edit Organization Headquarters Information

On the “Edit Organization Headquarters Information” page, the leadership contact updates the information as needed.

When edits are complete, they select **Save & Return** to save their updates. The maintenance web form returns them to the “C-D-O Summary” page.

**WARNING:** If they change the organization’s name, when they select **Save & Return**, the maintenance web form will navigate to the “C-D-O Summary” page and give them a warning message. The message will prompt them to generate and submit an up-to-date signed agreement. The leadership contact will need to generate and upload their updated signed agreement.

**The leadership contact makes all necessary updates before submitting and uploading a new agreement.**

## Service Locations

The Service Locations table allows a leadership contact to review and/or edit the states and counties in which the organization provides enrollment assistance.

In the Service Locations table of the “CDO Summary” page, a leadership contact can select **Edit** to edit their service locations.

The maintenance web form navigates to the “Edit Service Locations” page.

## Service Locations – State and County(ies)

On the “Service Locations” page, a leadership contact selects the **state** in which the organization will provide enrollment assistance services from the drop-down menu. The Available Counties list will populate with the counties for the state chosen.

The leadership contact then:

- Selects the **county or counties** in which the organization will provide enrollment assistance services; and
- Moves the **applicable counties** to the Selected Counties table by using the arrows in the Available Counties table. They may filter the list of counties by entering the county name in the Filter field.

## Service Locations – Update Table

The Selected Counties table will include all service locations selected for the organization.

The leadership contact then selects **Update Table**.

## Service Locations – Save & Return

The leadership contact repeats the steps for each state in which the organization will provide enrollment assistance services.

When edits are complete, the leadership contact selects **Save & Return** to save their updates.

The maintenance web form will return them to the “C D O Summary” page.

**WARNING:** If they add or remove states where the organization is providing service, when they select **Save & Return**, the maintenance web form will navigate to the “C D O Summary” page and give them a warning message. The message will prompt them to generate and submit an up-to-date signed agreement. They will need to generate and upload their updated signed agreement.

**The leadership contact should make all necessary updates before submitting and uploading a new agreement.**

## Additional Organizational Information

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

A leadership contact can select **Edit** to edit their additional organization information.

The maintenance web form navigates to the “Edit Additional Organization Details” page.

### Edit Additional Organizational Details

On the “Edit Additional Organization Details” page, an organization can update their information as needed.

When edits are complete, they can then select **Save & Return** to save their updates.

The maintenance web form will return them to the “CDO Summary” page.

### Contact Information – Manage Contacts

Managing contacts

The Edit Contact Information table allows an organization to review and/or edit information for the organization’s leadership contacts.

CMS requires each organization to have an Organization Senior Official and a CAC Project Director. Though not a requirement, they may designate a third contact, referred to as the Secondary Contact.

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

### Edit Contact Information

To edit a contact (for example, if an existing contact’s last name changed or their email address or phone number changed), or to replace a contact (for example, an existing contact left the organization and someone else is taking their place), or move a contact to a different role, the organization reviews the information on the “Edit Contact Information” page prepopulated with the Organizations Contact Information on record and updates any of the information shown for each contact as needed.

- Once updates are complete, the leadership contact selects **Save & Return** either at the top or the bottom of the page.
- The maintenance web form will return them to the “CDO Summary” page.

### Add Secondary Contact

To add a Secondary Contact, a leadership contact selects **Manage Contacts** in the Contact Information table of the “C-D-O Summary” page and selects **Add Secondary Contact**.

## Save Secondary Contact

They then enter the Secondary Contact information and selects **Save & Return**.

The maintenance web form returns them to the “C-D-O Summary” page, and the Secondary Contact table now shows the Secondary Contact information they added.

## Remove Secondary Contact

To remove a Secondary Contact, they would select **Manage Contacts** in the Contact Information table of the “CDO Summary” page.

## Delete Secondary Contact

The leadership contact then selects **Delete** at the bottom of the Secondary Contact table.

The “Edit Contact Information” page will no longer list anything in the Secondary Contact table.

When edits are complete, the leadership contact selects **Save & Return**.

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

## Replace Agreement

An organization must replace the CMS-CDO agreement if it is out of date or if a leadership contact made changes to the Organization Name, Operating State, and/or Organization Senior Official’s name during their session. To generate their up-to-date signed agreement, a leadership contact selects **Replace** in the Agreement PDF table on the “CDO Summary” page.

**WARNING:** While an agreement is under review by CMS, the organization’s account is **locked**, and they will be unable to edit their information, including their CAC roster. After receiving a response email, their account will be unlocked again, and they will then be able to edit the organization’s information or CAC Roster using the maintenance web form.

## Replace Agreement-Continued

A pop-up will appear asking if they need to make any changes to their information before proceeding to replace an agreement.

The leadership contact selects **OK** to proceed to upload their agreement or selects **Cancel** to stay on the “CDO Summary” page and update their information or add their CAC roster as needed.

- Then they select **Print PDF Agreement**. The web form then opens a new window in their Internet browser that displays their updated agreement. The submitter should review this PDF to make sure that their edits are reflected, especially pages one and twelve of the agreement.

## Upload a New Signed and Dated CMS-CDO Agreement

The leadership contact will then return to the maintenance web form window in their Internet browser. They can either print a physical copy for a wet signature from their Organization's Senior Official, or have their Senior Official do a time-stamped, digital signature on all applicable pages.

**WARNING!** The web form gives users only 60 minutes to complete this task. If a user is unable to complete the upload of the signed agreement within 60 minutes, they will need to log back into the OMWF to complete this task. If edits or changes were made in the previous session, these changes will need to be made again, **BEFORE** uploading the new agreement. The web form does not save changes until the agreement is submitted, therefore, if the web form timed out before the agreement was uploaded, those changes will not have been saved.

Leadership contacts must upload all pages of the signed agreement, including the signed and initialed COI Attestation, if applicable, on pages 13 and 14, but they do NOT have to upload Appendix A.

Once an organization starts the process, they have two options for when to upload their signed agreement. They can:

- Keep the maintenance web form open, obtain the Organization Senior Official's signature (either time-stamped digital or wet signature is acceptable), and return to the maintenance web form within 60 minutes; or
- Exit the maintenance web form, obtain the Organization Senior Official's signature, and log back into the maintenance web form later to upload.

## Confirmation

The "Confirmation" page provides a summary of the leadership contact's session and allows them to print and save a PDF confirmation containing the information they submitted.

CMS recommends that the organization prints and saves this confirmation for their records. They will only be able to access this confirmation at the end of their session.

The confirmation does not save, and they cannot return to save and print it later.

The leadership contact selects **Print PDF** to generate a PDF confirmation.

## Active CDO Renewal

For current CDO's, CMS certifies organizations on a specific timeframe, typically for two years. To renew an agreement, leadership contacts should access the CDO maintenance web form to update the organization's information and submit a new signed and dated agreement.

**NOTE:** Leadership contacts will be able to renew starting 30 calendar days prior to the organization's expiration date. They can renew any time during that 30-day window but must renew the agreement by the organization's expiration date.

If the organization does not renew the CDO agreement before the expiration date, the organization will become inactive and be de-certified. If the organization is de-certified, they will need to re-apply to the CDO Program if they wish to continue to provide CDO services.

If an organization does not know their expiration date, they can email [C A C Questions@CMS.HHS.gov](mailto:CACQuestions@CMS.HHS.gov). The organization can also view their expiration date in the Agreement PDF table on the "CDO Summary" page of the maintenance web form.

## Active CDO Renewal Resources

For complete details on the CDO agreement renewal process, please reference:

- the CDO Agreement Renewal Technical Demonstration module located on the Marketplace Technical Assistance Resources site at <https://www.cms.gov/marketplace/technical-assistance-resources/assister-programs/information-for-active-cdos>
- REGTAP CAC-CDO Resources at: <https://regtap.cms.gov/cdoresources.php> \*

Keep in mind that you must be a registered user to utilize the REGTAP resources. When selecting the above link, it will allow you to register.

## Next Steps

If CMS approves a CMS – CDO agreement, leadership contacts will receive a Welcome Packet email that includes the organization's unique CDO ID, the agreement counter-signature page with the effective date, and important guidance for operating as a CDO.

The C-D-O leadership contacts need to:

- Maintain administrative data on CDO headquarter location, service locations, leadership contacts information, etc.
- Certify their CAC staff and maintain their CAC roster per Section II, paragraphs 1 through 4 (Obligations and Conditions) of the CMS – CDO agreement.
- Monitor CAC annual certification data from the Marketplace Learning Management System (MLMS).
- Keep their CDO information current per Section II, paragraphs 5 and 6 (Obligations and Conditions) of the CMS – CDO agreement.
- Renew their signed CMS – CDO agreement during their renewal period.

## Next Steps – Certifying CAC Staff & Maintaining a CAC Roster

## Next Steps – Certifying CAC Staff & Maintaining a CAC Roster

In order for a CAC to be certified, they must:

- Be assigned their unique CAC ID by their organization’s leadership.
- Be listed on their organization’s CAC Roster in the O-M-W-F, and
- Complete Annual Assister Certification Training in the Marketplace Learning Management System (MLMS).

### **CDOs must:**

- Have at least one CAC certified on the CAC roster per their CMS - CDO agreement.
- Existing CDO’s must have at least one certified CAC on the CAC roster. If existing CDO’s go without at least one certified CAC on the roster for a duration of 90 consecutive days during the two-year period of performance, they will be decertified.
- If decertified, CDOs will need to reapply during Open Season.
- Refer to the CAC Roster Job Aid at: <https://regtap.cms.gov/cdoresources.php> for complete instructions on adding and maintaining the CAC roster.

## Next Steps – Keeping CDO Information Current

### Next Steps – Keeping CDO Information Current

Per Section II, paragraph 5 and 6 (Obligations and Conditions) of the CMS - CDO agreement, to keep CDO information current, the organization must update their CDO record if any of these change:

- Organization name and/or address
- List of leadership contacts or CAC’s
- Service Locations
- Enrollment assistance type (open enrollment only or year-round)
- Specialty areas

Organization’s leadership contacts can access the maintenance web form to make these updates.

If changes are made to the Organization Name, Organization Senior Official’s name, and/or the Operating State, the maintenance web form will prompt to upload a new signed and dated CMS - CDO agreement.

## Resources

This slide provides links to the resources available to assist leadership contacts with the CDO Organization Maintenance Web Form.

## End of Presentation

This concludes the CDO Organizational Maintenance Web Form Technical Demonstration. Thank You.