

# CDO Agreement Renewal – Video Transcript

---



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

## Table of Contents

Welcome to CDO Agreement Renewal Technical Demonstration .....	3
Renew and Update the CDO Information .....	3
Agreement Renewal Time Frame .....	3
CDO Summary – Review and Edit CDO Information .....	3
Renewal of the CMS-CDO Agreement .....	3
Upload a New Signed and Dated CMS-CDO Agreement.....	4
Print PDF Agreement .....	4
Review Pages 1 and 12.....	4
Organization Senior Official’s Signature – Page 12.....	4
Conflict of Interest Attestation – Page 13.....	4
Conflict of Interest Attestation – Page 14.....	5
Upload the Agreement – Pages 1 through 14 .....	5
CDO Summary – Submit the Renewal Agreement.....	5
Submission Confirmation.....	6
Update Organization Information: CDO Summary Page .....	6
Making Changes to a Section on the CDO Summary Page .....	6
Upload a New Signed CDO Agreement.....	6
Print PDF Agreement .....	6
Incorrect Agreement Information.....	7
Upload a New Signed and Dated CMS-CDO Agreement.....	7
Submission After Editing.....	7
CDO Summary – Submit the Renewal Agreement.....	7
Submission Confirmation.....	8
Resources.....	8
End of Presentation .....	8

## Welcome to CDO Agreement Renewal Technical Demonstration

Hello! Welcome to the Certified Application Counselor Designated Organization (CDO) Agreement Renewal Technical Demonstration!

### Renew and Update the CDO Information

The Centers for Medicare & Medicaid Services (CMS) certifies CDOs on a specific timeframe, typically for two years. To renew a CDO agreement, leadership contacts (Organization Senior Official, CAC Project Director, or Secondary Contact, if applicable) should access the CDO Organizational Maintenance web form or OMWF, referred to as the maintenance web form, to update the organization's information and submit a new signed and dated CMS-CDO agreement when required.

From the "Welcome" page, several resources are available for the various tasks completed using the maintenance web form. These are the hyperlinks displayed on this slide in the orange box.

### Agreement Renewal Time Frame

Leadership contacts will be able to renew starting 30 calendar days prior to the organization's expiration date. If the organization does not renew the CDO agreement *before* the expiration date, the organization will become inactive. If the organization becomes inactive, the organization will be decertified and need to *re-apply* to the CDO Program.

An organization can check their expiration date any time in the Agreement PDF table on the "CDO Summary" page of the maintenance web form. They can also email us at [CACQuestions@cms.hhs.gov](mailto:CACQuestions@cms.hhs.gov).

### CDO Summary – Review and Edit CDO Information

From the "CDO Summary" page, organization leadership contacts can review and/or edit the organization's information. Each table on the CDO Summary page represents a section of the CDO application web form.

**Note:** Organizations are required to submit a new, signed CMS-CDO agreement if they change any of the following: Organization Name, Operating State(s), and/or Organization Senior Official's name.

### Renewal of the CMS-CDO Agreement

If there are no changes or edits to the CDOs information on record with CMS, the leadership contacts can access the "CDO Summary" page and replace the existing agreement with a new signed and dated version.

The Replace link in the Agreement PDF table on the "CDO Summary" page will become active 30 calendar days prior to the organization's expiration date. If an organization tries to replace their agreement before the 30 calendar days, they will find the link will be greyed out and inaccessible.

To generate an up-to-date signed CMS-CDO agreement, leadership contacts will:

- Log in to the CDO Organization Maintenance Web Form.
- In the Agreement PDF table on the "CDO Summary" page, select **Replace**.

A pop-up will appear reminding leadership contacts to update organization information before submitting a new agreement. Leadership contacts select **OK** if they don't need to update information and are ready to proceed to upload a new agreement.

If edits are needed, leadership contacts should select Cancel to stay on the "CDO Summary" page and update organization information as needed. We will illustrate these steps later in this demonstration.

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

Leadership contacts must upload all pages of the signed agreement, including the COI Attestation 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 either:

- Keep the maintenance web form open, obtain the Organization Senior Official's signature (either 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.

NOTE: If edits are made to the CDO's information and you **do not** upload the signed agreement within the 60-minute timeframe, these edits will NOT be saved when returning to the maintenance web form! *You will need to make these edits again and select save before uploading the signed agreement.*

## Print PDF Agreement

On the "Attestation and Agreement Upload" page, leadership contacts will select Print PDF Agreement. The maintenance web form opens a new window in the internet browser that displays the updated CMS-CDO agreement.

## Review Pages 1 and 12

Next, leadership contacts review pages 1 and 12 of the agreement and confirm their organization's information. Edits to the agreement terms are not permissible. If the organization's information is correct, the leadership contact will simply print and have the OSO sign the agreement, then attest to the COI. Leadership contacts do not make edits or changes to the printed agreement. These will not be accepted.

## Organization Senior Official's Signature – Page 12

The Organization Senior Official must sign and date the signature page of the agreement.

## Conflict of Interest Attestation – Page 13

The OSO reviews and initials each statement.

## Conflict of Interest Attestation – Page 14

If there is a potential COI, the OSO will fill out the table provided on page 14 with the Company, Type of Relationship, and Content Area for the disclosure of any actual or potential conflicts of interest.

The OSO then attests that they have read and completed this form and provided current and accurate information to the best of their ability and they understand that typing their name on the signature line serves as an electronic signature for purposes of this form.

## Upload the Agreement – Pages 1 through 14

To upload an agreement, leadership contacts will:

- On the Attestation and Agreement Upload page, select **Upload a File**.
- In the pop-up window, navigate to the place they saved a PDF version of the updated, signed agreement on their computer and select the file to upload.
- Only upload pages 1 through 14 of the agreement.

Then, they will select **Save & Return**. If they did not successfully upload their agreement, they will receive a warning message.

## CDO Summary – Submit the Renewal Agreement

On the “CDO Summary” page, they will select Submit to submit their changes.

Leadership contacts should NOT select the Submit button if they have more work to do, such as adding CACs to the CAC roster. Once a user selects Submit, the record is locked until the agreement is approved or rejected. No changes can be made while the record is locked.

## Submission Confirmation

The “Confirmation” page provides a summary of the session and allows leadership contacts to print and save a PDF confirmation containing the information submitted.

**Note:** CMS recommends that the contact completing the renewal submission prints and saves this confirmation for the organization’s records since the confirmation page will not display again once the contact exits the web form. Leadership contacts cannot return to save and print it later. Leadership contacts will then:

- Select **Print PDF** to generate a PDF confirmation.
- Select **Exit** to exit the web form.

## Update Organization Information: CDO Summary Page

If a Leadership contact needs to update their organization’s information during their agreement period, they should access the OMWF to make these changes and submit a new agreement, if necessary.

From the “CDO Summary” page, they can review and/or edit the organization’s information.

Organizations are required to submit a new signed CMS-CDO agreement if they change any of the following: Organization Name, Operating State(s), and/or Organization Senior Official’s name.

Organizations are **not** required to submit a new signed CMS-CDO agreement if they make any other changes. If they change any part of the Organization Headquarters Address or Service Location counties, the system creates an amendment to their current, signed, and approved CMS-CDO agreement upon submission of these changes.

## Making Changes to a Section on the CDO Summary Page

To edit a section on the CDO Summary page, select **Edit** and make the necessary changes to the page.

When edits are complete, select **Save & Return**. The web form returns you to the “CDO Summary” page. If you made edits that affect the agreement, you will be prompted to replace and submit a new agreement.

For more information on making changes in the OMWF, select **User Guide** at the top of screen.

## Upload a New Signed CDO Agreement

Once changes are complete, the Leadership contact can upload a new signed and dated CMS-CDO agreement.

In the Agreement PDF table on the “CDO Summary” page, the Leadership Contact will select **Replace**.

A pop-up will appear reminding leadership contacts to update organization information before submitting a new agreement. Select OK to proceed to upload a new agreement.

## Print PDF Agreement

On the “Attestation and Agreement Upload” page, leadership contacts will select **Print PDF Agreement**. The maintenance web form opens a new window in the internet browser that displays the updated CMS-CDO agreement.

### Incorrect Agreement Information

The Leadership Contact will review the downloaded agreement to make sure the edits have been reflected in the new agreement.

If any information on the downloaded agreement is incorrect, they can return to the “**Attestation and Agreement Upload**” page in the maintenance web form and select **Cancel**.

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

Once a Leadership contact has confirmed all changes have been made to the CDO agreement, they must upload all pages of the signed agreement, including the COI Attestation on pages 13 and 14, but they do NOT have to upload Appendix A.

As a reminder, once an organization starts the process, they have two options for when to upload their signed agreement. They can either:

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

### Submission After Editing

If edits are made to the CDO’s information but the signed agreement is not uploaded within the 60-minute timeframe, edits will NOT be saved when you return to the OMWF! *You will need to make these edits again and save before uploading the signed agreement.*

### CDO Summary – Submit the Renewal Agreement

On the “CDO Summary” page, they will select Submit to submit their changes.

Leadership contacts should NOT select the Submit button if they have more work to do, such as adding CACs to the CAC roster. Once a user selects Submit, the record is locked until the agreement is approved or rejected. No changes can be made while the record is locked.

## Submission Confirmation

The “Confirmation” page provides a summary of the session and allows leadership contacts to print and save a PDF confirmation containing the information submitted.

**Note:** CMS recommends that the contact completing the renewal submission prints and saves this confirmation for the organization’s records since the confirmation page will not display again once the contact exits the web form. Leadership contacts cannot return to save and print it later. Leadership contacts will then:

- Select **Print PDF** to generate a PDF confirmation.
- Select **Exit** to exit the web form.

## Resources

This slide provides links to the resources available to assist leadership contacts with the CDO agreement renewal process.

## End of Presentation

This concludes the CDO Agreement Renewal Technical Demonstration. Thank you.