Overview and Access Code Transcript

CDO Organizational Maintenance Web Form Demonstration Series

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

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Overview and Access Code Demonstration

Welcome to the certified application counselor designated organization (CDO) Organizational Maintenance web form demonstration video series. This is the Overview and Access Code demonstration video.

This is one out of four demonstration videos created by the Centers for Medicare & Medicaid Services (CMS) focused on activities you can complete using the CDO Organizational Maintenance web form.

CDO Organizational Maintenance Web Form Video Series

There are three other videos in the CDO Organizational Maintenance web form demonstration series.

For a step-by-step demonstration of how to add and update a certified application counselor (CAC) roster using the CDO Organizational Maintenance web form, access the CDO Organizational Maintenance Web Form Demonstration Videos – CAC Roster video.

For a step-by-step demonstration of how to update CDO information using the CDO Organizational Maintenance web form, access the CDO Organizational Maintenance Web Form Demonstration Videos – CDO Data Management video.

For a step-by-step demonstration of renewing an organization's CDO status using the CDO Organizational Maintenance web form, access the CDO Organizational Maintenance Web Form Demonstration Videos – CDO Renewal video.

You can access these videos and other important training modules, FAQs and videos on the CDO Program page. The website URL is on the screen.

Session Agenda

During this demonstration, I will describe the CDO Organizational Maintenance web form, which we will refer to as the maintenance web form, and will demonstrate how to access the maintenance web form, how to review and update your organization's information, and how to upload a CMS-CDO agreement.

Audience

The intended audience for this demonstration is organization contacts who received preliminary approval from CMS and who need to one, create an access code; two, review their organization's information, and; three, upload their signed CMS-CDO agreement for the first time.

Before Accessing the Organization Maintenance Web Form

Now, we will discuss parts of the maintenance web form and the information you need to complete the web form.

The CDO Organizational Maintenance Web Form

You can only access the maintenance web form after receiving a preliminary approval email from CMS. Organizations who receive this email can then access the maintenance web form to submit a signed CMS-CDO agreement. After CMS approves the agreement, organizations can use the maintenance web

form to maintain their information, submit, and maintain a roster of CACs, and renew their CDO status after two years.

This functionality allows you to maintain your organization's CDO information and CDO designation in one place and ensures that CMS has current information about your organization, which is critical when providing programmatic updates and communications.

When to Submit a CMS-CDO Agreement

It is important to note that you may not only submit one version of your CMS-CDO agreement. CMS needs a new signed agreement for your organization if: CMS recently approved your CDO application and does not have a signed agreement on file for your organization, or you made changes to your organization's information that impacts your agreement, or your organization's agreement has expired because it is more than two years old.

We will discuss each of these scenarios further in our demonstration videos.

Required Information to Complete the Web Form

You must have a code to access the maintenance web form. As a reminder, after CMS approves your CDO application, your organization's contacts listed on the CDO application will receive a preliminary approval email that contains the link to the maintenance web form. The first time you access this web form you will create an access code.

CMS recommends that you keep this information for your records. Moving forward, if you forget your access code, you have the option of resetting it, but it is critical that you remember the responses to your security questions you setup.

If you are uploading a signed CMS-CDO agreement, make sure the file you are uploading is complete, that it includes pages 1 through 12, is in PDF format, and is signed and dated by your Organization Senior Official.

If you are updating your organization's information, make sure you have all of the information needed to complete your updates in one session.

If you are uploading your CACs' information for your CAC roster, make sure you have their full name, email address, and CAC ID.

Organizational Maintenance Web Form Demonstration

Now, we will walk through the maintenance web form.

Note that sessions expire in sixty minutes so make sure you can complete your actions within this time frame. If your session expires, you will need to log back into the web form and complete your actions.

Overall Navigation and Links

As I mentioned, after approving your application, CMS will send you a preliminary approval email with a link to the maintenance web form. Select this link to access the Welcome Page of the maintenance web form.

At the top right-hand corner of the maintenance web form Welcome Page are links, which open guides that provide step-by-step instructions for completing various processes you need to complete using this web form.

Welcome Page: Create Access Code

You must enter or create an access code to proceed with the maintenance web form.

If you have never accessed the maintenance web form, select the Create Access Code button, which allows you to setup access codes for your organization's contacts.

If you already have a login ID and access code, you can enter it in the login fields at the bottom of the Welcome Page.

If you forgot your login ID and access code, you can reset it by selecting the Forgot Access Code link at the bottom of the Welcome Page.

First, I will show you how to create an access code. Select the Create Access Code button to begin the process. The web form will navigate to the Create Access Code page.

Create Access Code

On the Create Access Code page, you will begin by entering your email address.

Please note the web form generates your company's list of contacts based on your organization's information on record or the information you entered about your organization on the CDO application web form. Therefore, you must enter the same information about your organization that you entered as the contact information on record with CMS.

I've entered my email address. Now I will enter the proposed access code. As you fulfill the access code requirements, they will appear in green and the red X will turn into a green check mark.

Then, I need to confirm the access code by entering it again.

Now that I have all of the green check marks, I will proceed with selecting two security questions and entering the correct response to each.

Then, I will select the Continue button to proceed. The web form navigates to the Access Code Confirmation page.

You only need to complete this process once.

Again, CMS recommends that you keep track of this information moving forward. You have the ability to reset the access code if you forget it, but it is critical that you remember the responses to the security questions you setup.

Access Code Confirmation Page

On the Access Code Confirmation page, select the Continue button. The web form navigates back to the Welcome Page where you can use the information you just created to log in.

Welcome Page: Forgot Password

If you setup your access code and forget your information after you leave the web form, you can select the Forgot Access Code link on the Welcome Page to reset your information.

I will select the Forgot Access Code link to begin.

Forgot Access Code

On the Forgot Access Code page, you will begin by entering your email address.

For this example, I will enter an email address, then I will select the Send PIN button. The web form will send a PIN to the organization contact's email address on record. The PIN expires in 24 hours. Please note, the email might go into your SPAM/JUNK folder, so please be sure to check there if you do not receive the email.

Once you receive the six-digit PIN, you will enter the PIN in the field provided.

Next, you will select the Continue button. The web form navigates to the Reset Access Code page.

Reset Access Code

On the Reset Access Code page, first, you will enter your new access code. Second, you will confirm your new access code by entering it again.

Now that I have all green check marks, I will continue to answering the security questions that I previously set up.

Then, I will select the Continue button to proceed. The web form navigates to the Access Code Reset Confirmation page.

Access Code Reset Confirmation

On the Access Code Reset Confirmation page, select the Continue button. The web form navigates back to the Welcome Page where you can log in.

Uploading Your CMS-CDO Agreement

Now that we demonstrated how to create and reset an access code, we will log in using the information we setup and will demonstrate how to review your organization's information and upload your CMS-CDO agreement for the first time.

CDO Summary

First, I will log in using the credentials I just set up.

We are now on the CDO Summary Page. This page allows you to review and edit your organization's information and upload your signed CMS-CDO agreement. Each section on the CDO Summary page represents a section of the CDO application web form.

The first section is the Agreement PDF section. In the Agreement PDF table, you can view or add your CMS-CDO agreement.

CMS recommends reviewing your organization's information before submitting an agreement.

The CDO Summary page summarizes all of your organization's information as entered on the CDO application.

If your organization experienced any changes since submitting your CDO application and accessing the maintenance web form, you can modify your information by selecting the Edit button next to each section on the CDO Summary page.

Editing Organization Headquarters Information

In this demonstration, we will edit our address. To begin, we will select the Edit button next to the Organization Headquarters Information section.

Edit Organization Headquarters Information Page

On the Edit Organization Headquarters Information page, you can modify any information listed. In this example, I will change our address.

Then, I will select the Save and Return button.

CDO Summary

Back on the CDO Summary page, you can review the Organization Headquarters Information section and confirm the address change.

Warning Message and Agreement PDF Table

Now that we demonstrated how to review your organization's information and edit any information as needed, I will demonstrate how to add your CMS-CDO agreement. In this scenario, this is the first time we are submitting the agreement.

Notice there is a warning message at the top of the CDO Summary page. This message notifies me that my organization's agreement is out of date. This is because I have not added an agreement yet. I also made a change to my organization's address. Doing so will prompt me to upload a new agreement if my organization already had an approved agreement with CMS.

The Agreement PDF table is also empty. If I have uploaded an agreement, this table will have the file name and date in which my organization uploaded the agreement.

Agreement PDF Table: Add Link

On the CDO Summary page, select the Add button in the Agreement PDF table.

Attestation and Agreement Upload Page

The Attestation and Agreement Upload page will appear.

If this is your first time accessing this agreement, you will first need to download a copy of your pre-populated CMS-CDO agreement. To do this, select the Print PDF Agreement button.

Review the CMS-CDO Agreement PDF

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

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

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

Since we modified our address, we need to make sure this matches the new information we entered. I confirm that it does, so I am ready to proceed.

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

Save the File

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

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

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

Upload a File

To upload your file on the maintenance web form, select the Choose File button under the Upload a File section. The web form displays a pop-up window.

In the pop-up window, navigate to the place where you saved the PDF version of your signed CMS-CDO agreement on your computer. Select the file, and select the Open button. The web form will return you to the Attestation and Agreement Upload page.

Select the Upload Attachment button.

In the Attachment Summary table, select the View link to open your file. If the agreement did not upload, the web form will display a warning message.

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

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

After selecting the Submit button, the web form navigates to the Confirmation page.

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. It is not saved and you cannot return to save and print it later.

Select the PDF button to generate a PDF confirmation.

Select the Exit button to exit the web form.

Please note, after you upload your signed CMS-CDO agreement, you will not be able to make any additional changes to your organization's information or add your CAC roster until CMS approves your agreement. You will not be able to edit any of your organization's information, or add, or edit your CAC roster while your agreement is under CMS review.

Your three contacts will receive an email once CMS makes their final determination.

This completes the CMS-CDO agreement upload demonstration. I will return to the PowerPoint to review additional resources.

Additional Resources

You can refer to the CDO Program web page for additional resources, including: the CDO Organizational Maintenance web form FAQs, the CDO Organizational Maintenance Web Form User Guide, and the CDO Learning Series videos.

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

This concludes this demonstration.