CERTIFIED APPLICATION COUNSELOR DESIGNATED ORGANIZATION (CDO)

CDO Organizational Maintenance Web Form (OMWF) User Guide

For new and existing CDOs

October 2024

CDO OMWF User Guide

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A. Welcome to the OMWF

1. What is the OMWF?

The [Certified Application Counselor Designated Organization (CDO) Organizational Maintenance Web Form (OMWF)](#) is the platform that designated CDOs use to maintain information about their organization with the Centers for Medicare and Medicaid Services (CMS).

You will use the OMWF to:

- **Renew** your agreement within a timeframe determined by CMS, typically two years from the effective date, by reviewing existing organization information

- **Submit** a new CMS-CDO Agreement, including a Conflict of Interest (COI) Attestation form for Organization Senior Official's signature via DocuSign.

- **Maintain** up-to-date administrative data on CDO headquarter location, service locations, designated contacts information, etc.

- **Make updates** to the Operating State(s), Organization Name, or Organization Senior Official's name. Note: if you update your Operating State(s), Organization Name, or Organization Senior Official's name, you must execute a new agreement with CMS reflecting these updates.

- **Provide updates** to the Service Location(s) or Headquarters Address. Note: if you 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 CMS-CDO Agreement.

- **Submit and maintain** a roster of CACs. It is a requirement of the program to maintain a CAC roster and have at least one certified CAC on that roster.

- **Monitor** CAC annual certification data from the Marketplace Learning Management System (MLMS).

2. Who can access the OMWF?

New applicants can access the OMWF only after receiving an email with final approval of the CDO application and a Welcome Packet from CMS. Moving forward, you can access the OMWF 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 OMWF.

After approving your agreement, CMS will send you an email with a link to the OMWF. Select the link to access the "Welcome" page to the [CDO Organizational Maintenance Web Form (OMWF)](#).

2.1 Create Access Code (Password)

If this is the first time accessing the OMWF and you do not have an access code, you will need to create one. To create an access code (password):

1. Select **Create Access Code** on the "Welcome" page of the OMWF.

Figure 1: Create Access Code Button

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.

3. Create and enter an **Access Code** that meets the following requirements. All information with a red (*) asterisk is mandatory required information.

- 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

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 OMWF each time.

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

6. Select **Continue** to proceed.

Figure 2: Create Access Code Page Fields

7. The OMWF will direct you to the "Access Code Confirmation" page. On the "Access Code Confirmation" page, select **Continue**. The OMWF will return you to the login page.

Figure 3: Access Code Confirmation Page Continue Button

2.2 I Have an Access Code

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

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

2. Enter your **Access Code**.

3. Select **Login**.

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 :

user@email.com

* Access Code

••••••

Login

Figure 4: Welcome Page Login Button

2.3 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 :

user@email.com

* Access Code

••••••

Login

Forgot Access Code

Figure 5: Welcome Page Forgot Access Code Link

1. On the "Forgot Access Code" page, enter your **email address** on record.

2. Select **Send PIN**. The OMWF will send a six-digit PIN to the **email address on record** (the email you provided in the CDO Application). The PIN expires in 24 hours.

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:

user@email.com
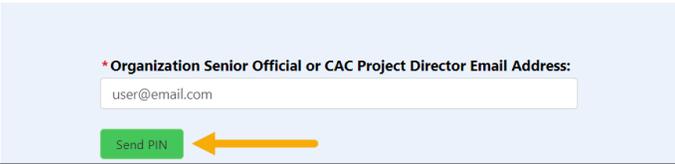
Send PIN

Figure 6: Forgot Access Code Page Send PIN Button

3. Once you receive a six-digit PIN, return to the OMWF.

4. Select the **Forgot Access Code** link on the "Welcome" page.

* Login ID :

* Access Code

Login

Forgot Access Code

Figure 7: Welcome Page Forgot Access Code Link

5. On the "Forgot Access Code" page, enter the **email address** and six-digit **PIN**.

6. Select **Continue**. The OMWF will take you to the "Reset Access Code" page.

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:

user@email.com

Send PIN

* PIN:

123456

Back   Continue
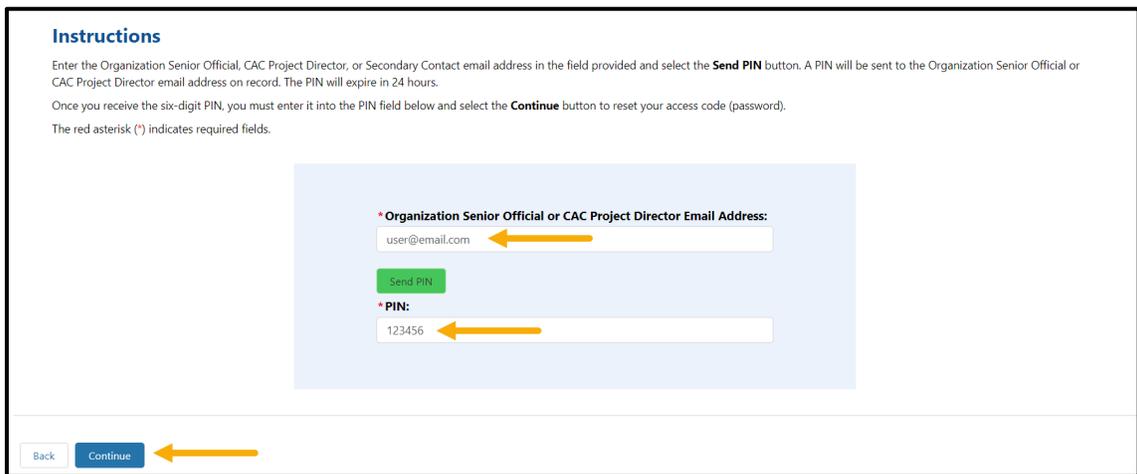
Figure 8: Forgot Access Code Window

7. On the "Reset Access Code" page, create and enter an access code that meets the requirements.

8. Confirm the access code by entering it again.

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

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 OMWF each time.

Figure 9: Reset Access Code Window

11. On the "Access Code Reset Confirmation" page, select **Continue**. The OMWF will return you to the login page.

Figure 10: Access Code Reset Confirmation Message

3. Maintaining the CDO Record

The "Organization Maintenance" tab allows you to review and/or edit your organization's information and renew/replace your signed agreement.

CMS encourages CDOs to review and update all the organization's information (addresses, contacts, service area(s), etc.) **before** renewing/replacing the agreement.

Each section on the "Organization Maintenance" tab represents a section of the CDO Application Web Form. **Table 1** provides guidance about how to proceed to the appropriate section of this user guide with instructions for each section.

Table 1:"CDO Summary" Page Sections

If	Then
You want to view the previous submissions by your organization to CMS	Refer to Section 3.1
You want to review and/or edit your organization's headquarters information	Refer to Section 3.2
You want to review and/or edit your organization's headquarters information	Refer to Section 3.2
You want to review and/or edit your organization's service locations	Refer to Section 3.3
You want to review and/or edit your organization's additional details	Refer to Section 3.4
You want to edit or replace the contact information for one or more of your organization's leadership contacts	Refer to Section 3.5
You want to view and/or renew/replace your CMS-CDO signed agreement	Refer to Section 4.1

3.1 View All Submissions

When the Organization Maintenance tab opens, instructions for editing the form and the **View All Submissions** link are displayed at the top of the page.

The **View All Submissions** link allows you to see all previous submissions from your organization to CMS.

Organization Maintenance

Select the action links in any section to update your
Note: The web form will prompt you for a new sign
Note: The web form will create an amendment to y

View All Submissions

Submit All Changes
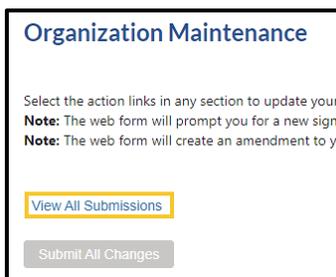
Figure 11: CDO Summary Page – View All Submissions Link

1. Select the **View All Submissions** link to proceed to the "CDO Submissions" page.
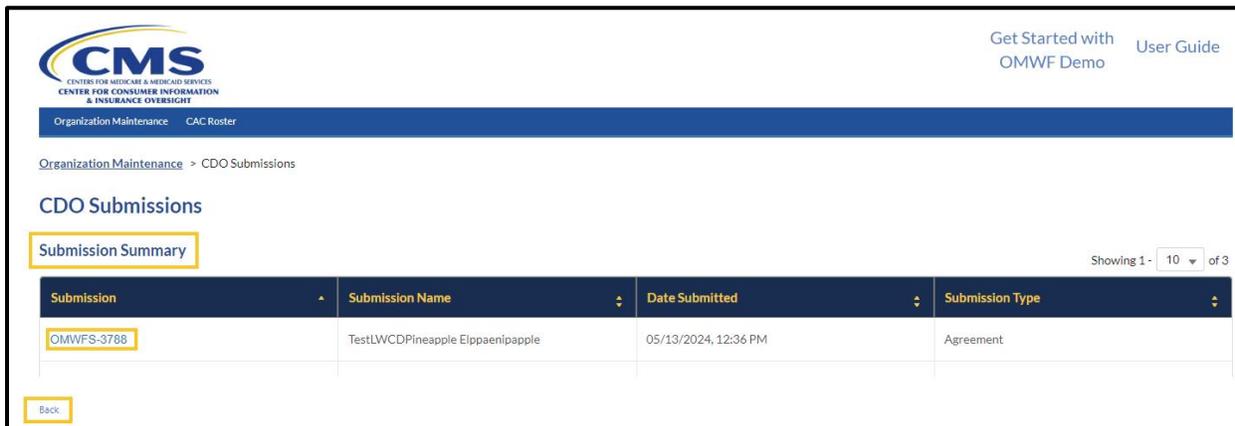
Figure 12: CDO Submissions Page

The page displays the **Submission Summary** table. The table contains information regarding the submission number, who submitted the information, when the information was submitted, as well as the type of submission. Located under the table is the **Back** button which returns you to the "CDO Summary" page.

2. Select a link to a previous submission located under the **Submission** column on the table to proceed to the "CDO Submission Details" page.
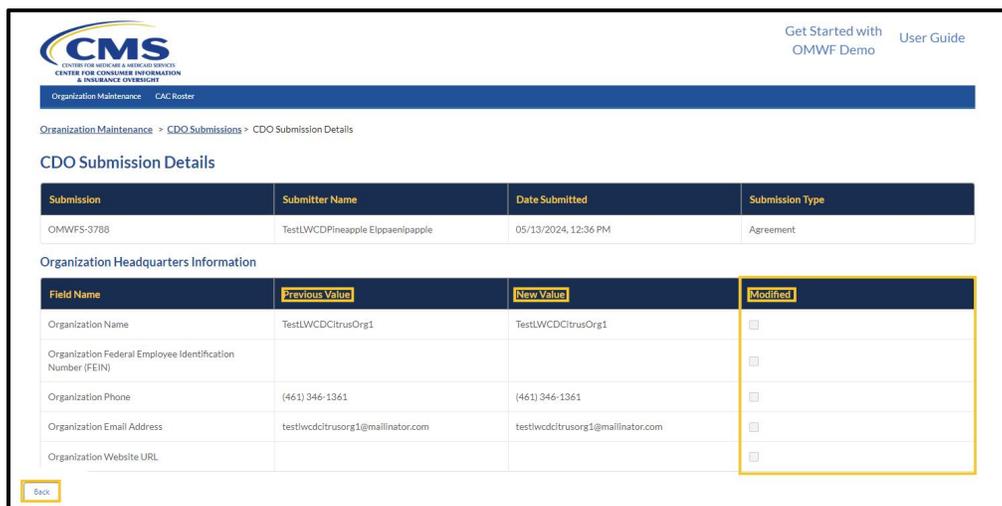
Figure 13: CDO Submissions Details Page

This page is read-only. Tables for each section of the form are displayed. Each table has a column for the name of the field on the form. Next to the field name are columns indicating what the previous value was in the form and the new value. Any fields with a new value will be identified with a check in a box under the column labeled **Modified**. The **Back** button, located at the bottom of the page, returns you to the "CDO Submissions" page.

3.2   Organization Headquarters Information Section

The "Organization Headquarters Information" section allows you to review and/or edit your organization's headquarters information.

1. In the Organization Headquarters Information table of the "Organization Maintenance" tab, select **Edit** to update your organization headquarters information. The OMWF will take you to the "Edit Organization Headquarters Information" page.

Figure 14: Edit Organization Headquarters Information Page Edit Link

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

3. When edits are complete, select **Save & Return** to save your updates. The OMWF will return you to the "Organization Maintenance" tab.

Edit Organization Headquarters Information

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:
Acme Assisters

Organization Federal Employee Identification Number (FEIN):

* Organization Phone Number [(XXX) XXX-XXXX]:
(555) 777-8888

* Organization Email Address:
acme@assisters.com

Organization Website URL:

Organization Headquarters Address

* Address Line 1:
12345 Acme Way

Address Line 2:

* City:
Orlando

* State:
FL

* Zip Code:
34787

Cancel   Save & Return

Figure 15: Edit Organization Headquarters Information Save & Return Button

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*WARNING: If you change your organization's name, when you select **Save & Return**, the OMWF will navigate to the "Organization Maintenance" tab and give you a warning message. The message will prompt you to replace and sign an up-to-date agreement. Refer to the* Replace an Agreement *section for instructions on how to replace and sign your updated CMS-CDO Agreement.*

Make all necessary updates before replacing and signing a new agreement.

3.3 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.

1. In the Service Locations table of the "Organization Maintenance" tab, select **Edit** to edit your service locations. The OMWF navigates to the "Service Locations" page.

Service Locations

State ▲	County
Florida	Brevard, Orange
Illinois	Cook
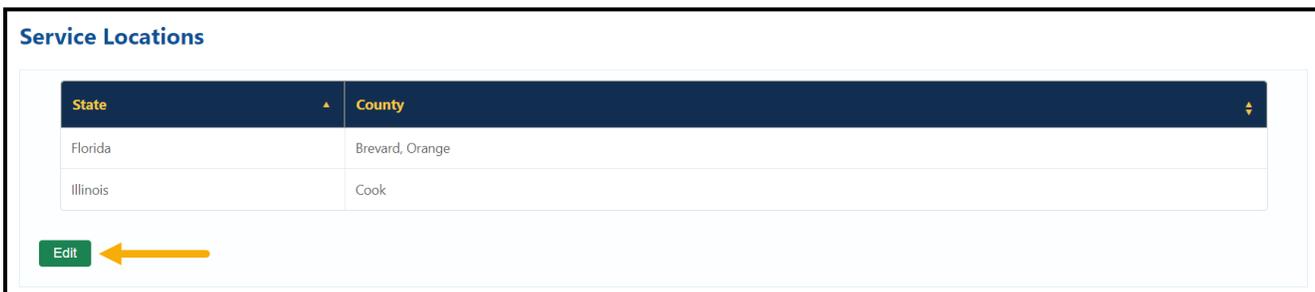
Edit ←

Figure 16: Edit Service Locations Button

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

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 right-pointing arrow to move the applicable counties to the **Selected Counties** list and select **Update Table** to apply changes. To remove selected counties, use the left-pointing arrow.

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

Map of Marketplaces

* **State:**
Select a State ←

County/Parish:

Available Counties
filter

Selected Counties
filter

Figure 17: Service Locations Page State and County List

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

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**.**
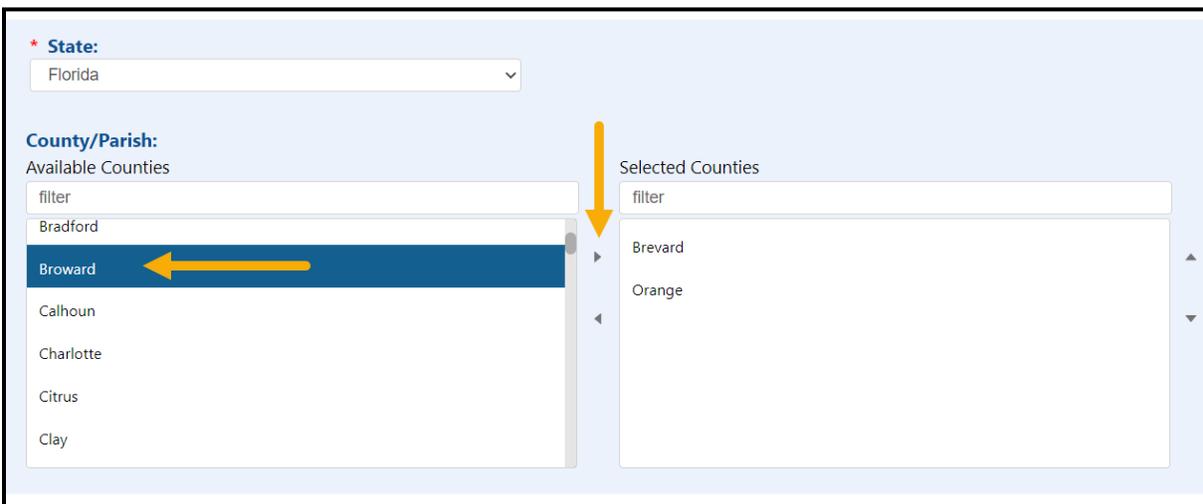
Figure 18: Service Locations Page Available Counties List

5. The Selected Counties table will include all service locations you selected for the organization. Select **Update Table**.
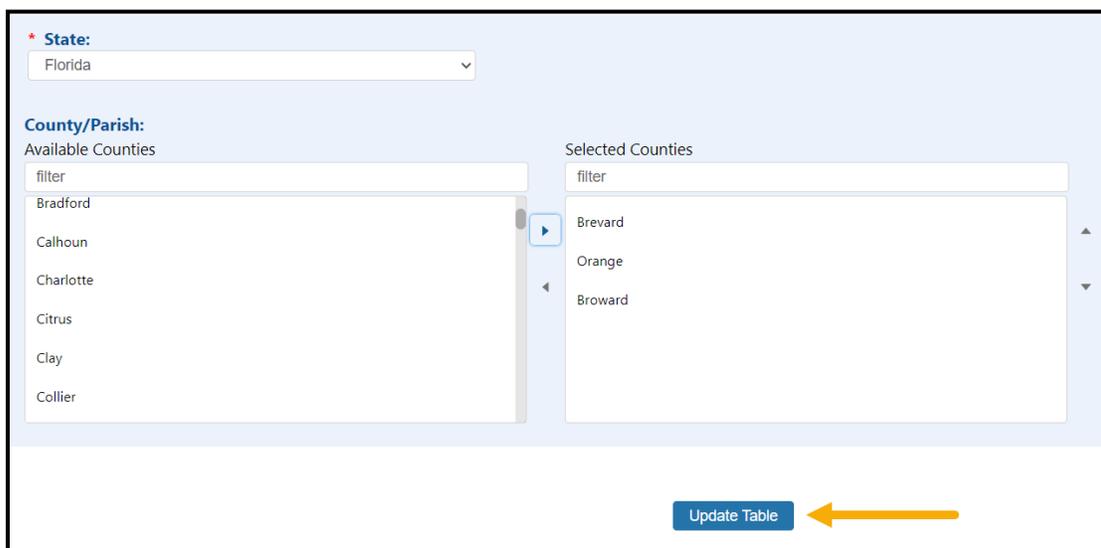
Figure 19: Service Locations Page Selected Counties List and Update Table Button

6. Repeat steps 2 through 5 for each state in which your organization will provide enrollment assistance services.

7. When edits are complete, select **Save & Return** to save your updates. The OMWF will return you to the "Organization Maintenance" tab.
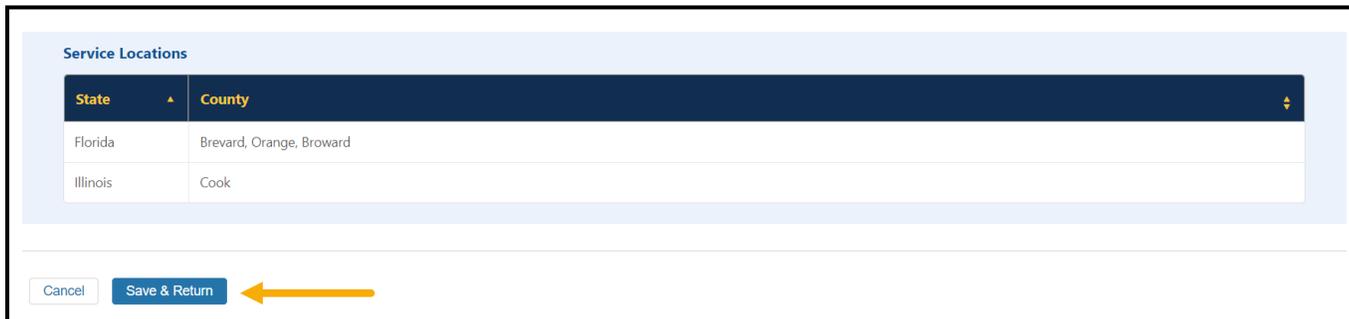
Figure 20: Service Locations Page Save & Return Button

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*WARNING: If you add or remove service location state(s), when you select **Save & Return**, the OMWF will navigate to the "Organization Maintenance" tab and give you a warning message. The message will prompt you to generate and submit an up-to-date agreement. Refer to the Replace an Agreement section for instructions on how to replace and sign your updated CMS-CDO agreement.*

Make all necessary updates before replacing and signing 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

3.4 Additional Organization Information

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

1. In the Additional Organization Information table of the "Organization Maintenance" tab, select **Edit** to edit your additional organization information. The OMWF navigates to the "Edit Additional Organization Details" page.

Figure 21: Additional Organization Information Table and Edit Button

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

3. When edits are complete, select **Save & Return** to save your updates. The OMWF will return you to the "Organization Maintenance" tab.

Edit Additional Organization Details

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]   [Save & Return]   ⬅

Figure 22: Edit Additional Organization Details Page Save & Return Button

3.5   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 also designate a third contact, referred to as the Secondary Contact.

Edit Contacts

To make changes to any of your organization's contact information, select **Edit** in the Contact Information table of the "Organization Maintenance" tab.

Contact Information

Organization Senior Official Information

First Name	Last Name	Email Address
Jennifer	Smith	jennifer.roberts@gdit.com

CAC Project Director Contact Information

First Name	Last Name	Email Address
Tom	Slater	thomas.slater2@gdit.com

Edit

Figure 23: Edit Contacts Button

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, select "edit" on the "Edit Contact Information" page prepopulated with the Organization Contact Information on record.

1. Update any of the information shown for each contact on the "Edit Contact Information" page.

2. Select **Save & Return** at the bottom of the page. The OMWF will return you to the "Organization Maintenance" tab.

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Edit Contact Information

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

Organization Senior Official

* First Name:	* Last Name:
Jennifer	Smith

* Email Address:	* Job Title:
jennifer.roberts@gdit.com	Project Director

* Primary Phone:	Primary Phone Extension:
(555) 777-8888	

Secondary Phone:	Secondary Phone Extension:

* Preferred Contact Method:
Email

CAC Project Director

* First Name:	* Last Name:
Tom	Slater

* Email Address:	* Job Title:
thomas.slater2@gdit.com	Project Manager

* Primary Phone:	Primary Phone Extension:
(555) 444-7777	

Secondary Phone:	Secondary Phone Extension:

* Preferred Contact Method:
Email

Add Secondary Contact

Cancel   Save & Return

Figure 24: Edit Contact Information Page

Secondary Contact

To add a secondary contact:

1. Select **Edit** in the Contact Information table of the "Organization Maintenance" tab.

Figure 25: Manage Contacts Button

2. Select **Add Secondary Contact**.

Figure 26: Add Secondary Contact Button

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

Figure 27: Secondary Contact Information and Save & Return Button

4. The OMWF returns you to the "Organization Maintenance" tab, and the Secondary Contact table shows the Secondary Contact information you added.

To remove a Secondary Contact:

1. Select **Edit** in the Contact Information table of the "Organization Maintenance" tab.

Figure 28: Secondary Contact Information and Manage Contacts Button

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

Figure 29: Secondary Contact Delete Button

3. The "Edit Contact Information" page will no longer list anything in the Secondary Contact table. When edits are complete, select **Save & Return**.
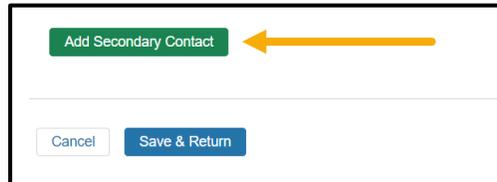
Figure 30: Edit Contact Information Save & Return Button

4. The "Organization Maintenance" tab will refresh and will no longer list anything in the Contact Information table for a secondary contact.

Contact Information

Organization Senior Official Information

First Name	Last Name	Email Address
Jennifer	Smith	jennifer.roberts@gdit.com

CAC Project Director Contact Information

First Name	Last Name	Email Address
Tom	Slater	thomas.slater2@gdit.com

Edit

Figure 31: "Organization Maintenance" tab Contact Information

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*WARNING: If you change your Organization Senior Official contact, when you select **Save & Return**, the OMWF will navigate to the "Organization Maintenance" tab and give you a warning message. The message will prompt you to generate and submit an up-to-date agreement. Refer to the Replace an Agreement section for instructions on how to replace and sign your updated CMS-CDO agreement.*

3.6 Submit All Changes

1. **Make all necessary updates before submitting and signing a new agreement**.

2. Once all changes are complete, select the **Submit All Changes** button at the top or bottom of the "Organization Maintenance" tab.

Organization Maintenance

Select the action links in any section to update your organization's information.
Note: The web form will prompt you for a new signed CMS-CDO agreement if you change the following: Organization name, Operating State, Organization Senior Official's name.
Note: The web form will create an amendment to your signed CMS-CDO agreement if you change the following: Headquarters' address, Operating counties.

⚠ **Warning!** You have made changes to your organization's information but have not submitted them yet. Please submit all saved updates before you leave to prevent losing your changes. After submitting your changes, the web form might ask you to generate an updated CMS-CDO agreement based on your recent updates.

Submit All Changes ⬅

Figure 32: Submit All Changes button

4. What prompts a new agreement?

The OMWF will prompt you when your CMS-CDO Agreement needs updating.

CMS requires a new CMS-CDO Agreement signed by the Organization Senior Official if:

- You made changes to your organization's information that affects your agreement. These changes include Operating State, Organization Name, and/or Organization Senior Official's name.

- Your CMS-CDO Agreement expired.

If you replace a CMS-CDO Agreement or made a change during your last session that generated an amendment to your agreement, the OMWF "Organization maintenance" tab will lock down, and you will be unable to edit your information. You will however still be able to add/edit CACs on the roster on the "CAC Roster" tab.

After receiving a response email, your account will be unlocked again, and you will then be able to edit the organization's information using the OMWF.

Organization Maintenance

Select the action links in any section to update your organization's information.
Note: The web form will prompt you for a new signed CMS-CDO agreement if you change the following: Organization name, Operating State, Organization Senior Official's name.
Note: The web form will create an amendment to your signed CMS-CDO agreement if you change the following: Headquarters' address, Operating counties.

⚠ **Warning!** You submitted a new CMS-CDO agreement or an amendment to your record. While CMS reviews this submission, the web form fields are locked and you will be unable to edit any of your existing information. The web form will unlock when CMS sends you a determination email.

Figure 33: CMS-CDO Lock Down Prompt

4.1 Replace an Agreement

The Agreement PDF table includes links that allow you to view or replace your CMS-CDO signed Agreement as needed.

1. Select **View** in the Agreement PDF table to review the current signed CMS-CDO Agreement.

Agreement PDF

File Name ⬍	Upload Date ⬍	CDO ID ⬍	Status ⬍	Approval Date ⬍	Renewal Opens ⬍	Expiration Date ⬍	Action
CDO_Agreement.pdf	7/20/2023 4:09 PM	ALCDOA36	Agreement Review Required	7/20/2023	6/21/2025	7/20/2025	Replace View

Figure 34: Agreement PDF Table View Link

2. Select **Replace** to replace the CMS-CDO Agreement.

Agreement PDF

File Name ⬍	Upload Date ⬍	CDO ID ⬍	Status ⬍	Approval Date ⬍	Renewal Opens ⬍	Expiration Date ⬍	Action
CDO_Agreement.pdf	7/20/2023 4:09 PM	ALCDOA36	Agreement Review Required	7/20/2023	6/21/2025	7/20/2025	Replace View

Figure 35: Agreement PDF Table Replace Link

3. Select **Review Updated Agreement** to review the agreement before sending it to the Organizational Senior Official (OSO) to sign.

4. If everything is correct, select the checkbox to confirm the changes and **Send Agreement to Organization Senior Official** button to send the attestation form to the OSO for signature.

Note: Only the OSO, listed on the application, will receive an email from DocuSign to electronically sign the CMS-CDO Agreement.

Attestation and Agreement

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, please select **Review Updated Agreement** and confirm that all changes are reflected in the agreement, specifically pages 1 and 12. If everything is correct, select the checkbox below to confirm the changes and **Send Agreement to Organization Senior Official** button to send the attestation form to the Organization Senior Official (OSO) for signature. Only the OSO, listed on your application, will receive an email from DocuSign to electronically sign the CMS-CDO agreement. If additional changes are required, select the **Cancel** button and navigate to the previous page to make additional changes.

[Review Updated Agreement]

☑ I have reviewed the updated agreement and confirm that all reflected changes are accurate.

[Cancel] [Send Agreement to Organization Senior Offical]

Figure 36: Attestation and Agreement Page

WARNING: While an agreement is under review by CMS, the organization's account is locked, and you will be unable to edit your organization information. After receiving a response email, your account will be unlocked again, and you will then be able to edit the organization's information using the OMWF. You will however still be able to add or edit CACs on the "CAC Roster" tab.

4.2   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.

1. Select **Print PDF** to generate a PDF confirmation.

2. Select **Exit OMWF** to exit the OMWF.

3. Select **Return to Organization Maintenance** to return to the "Organization Maintenance" tab.

Confirmation

The new agreement has been sent to your Organization Senior Official via email for signature.

⚠ Please print the PDF for your records before selecting the Exit or Return button.

The new agreement has been generated and sent to the Organization Senior Official listed on your application via email. The Organization Senior Official must open the email and sign the updated agreement in a DocuSign session. Print and save the confirmation PDF below for your records. 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.

Submission Time: 15/05/2024 4:18 PM

DocuSign email has been sent to the following contact: jennifer.roberts@gdit.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.

[Print PDF]

[Exit OMWF] [Return to Organization Maintenance]

Figure 37: Confirmation Page Exit Button

5. What prompts an amendment?

The OMWF will prompt you when your CMS-CDO Agreement needs to be amended. There are two situations which prompts for an amendment to the CMS-CDO Agreement:

- Changes to the Organizational Headquarters address

- Additions or removals to the Service Locations County information

If you change any part of the Organization Headquarters Address or Service Location counties, the system creates an amendment to your current, signed, and approved CMS-CDO Agreement upon submission of these changes.

Agreement PDF

File Name	Upload Date	CDO ID	Status	Approval Date	Renewal Date	Expiration Date	Action
CDO_Amendment.pdf	05-15-2024	USCDOB08	Active	05-13-2024	05-02-2026	05-31-2026	View
CDO_Appendix_A.pdf	05-15-2024	USCDOB08	Active	05-13-2024	05-02-2026	05-31-2026	View
CDO_COI_Attestation.pdf	05-15-2024	USCDOB08	Active	05-13-2024	05-02-2026	05-31-2026	View

Figure 38: CDO Amendment in Agreement PDF table

WARNING: While an amendment is under review by CMS, the organization's account is locked, and you will be unable to edit your organization information. After receiving a response email, your account will be unlocked again, and you will then be able to edit the organization's information using the OMWF. You will however still be able to add or edit CACs on the "CAC Roster" tab.

The Amendment Section of the document appears at the end of the CMS-CDO Agreement after the signature page.

Amendment Section

Submission End Time: 4/11/2024 1:02 PM

Change Submitted By: Jennifer Anistow

Description of Change: Refer to the tables below for recent changes.

Previous County List

State	County
Louisiana	Sebastian, Walthall, Acadia, Allen, Ascension, Assumption, Avoyelles, Beauregard, Bienville, Bossier, Caddo, Calcasieu, Caldwell, Cameron, Catahoula, Claiborne, Concordia, De Soto, East Baton Rouge, East Carroll, East Feliciana, Evangeline, Franklin, Grant, Iberia, Iberville, Jackson, Jefferson, Jefferson Davis, Lafayette, Lafourche, La Salle, Lincoln, Livingston, Madison, Morehouse, Natchitoches, Orleans, Ouachita, Plaquemines, Pointe Coupee, Rapides, Red River, Richland, Sabine, Saint Bernard, Saint Charles, Saint Helena, Saint James, St John the Baptist, Saint Landry, Saint Martin, Saint Mary, Saint Tammany, Tangipahoa, Tensas, Terrebonne, Union, Vermilion, Vernon, Washington, Webster, West Baton Rouge, West Carroll, West Feliciana, Winn

Current County List

State	County
Louisiana	Walthall, Acadia, Allen, Ascension, Assumption, Avoyelles, Beauregard, Bienville, Bossier, Caddo, Calcasieu, Caldwell, Cameron, Catahoula, Claiborne, Concordia, De Soto, East Baton Rouge, East Carroll, East Feliciana, Evangeline, Franklin, Grant, Iberia, Iberville, Jackson, Jefferson, Jefferson Davis, Lafayette, Lafourche, La Salle, Lincoln, Livingston, Madison, Morehouse, Natchitoches, Orleans, Ouachita, Plaquemines, Pointe Coupee, Rapides, Red River, Richland, Sabine, Saint Bernard, Saint Charles, Saint Helena, Saint James, St John the Baptist, Saint Landry, Saint Martin, Saint Mary, Saint Tammany, Tangipahoa, Tensas, Terrebonne, Union, Vermilion, Vernon, Washington, Webster, West Baton Rouge, West Carroll, West Feliciana, Winn

Amendment Page 1

Figure 39: CDO Amendment Section in the CMS-CDO Agreement

B. CAC Roster

1. Requirement for all CDOs

CMS requires that CDOs add a roster of their active CACs using the OMWF. This is a required component to your CDO record with CMS during your agreement period, typically every two (2) years. 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 OMWF.

New CDOs: Failure to have at least one certified CAC on your CAC Roster within 90 days of receipt of the Welcome Packet email will result in decertification/removal from the CDO Program.

Existing CDOs: Going without at least one certified CAC on the CAC Roster for a duration of 90 consecutive days during your typically two-year period of performance will result in decertification/removal from the CDO Program.

If decertified:

- You cannot be recertified.
- You must reapply to be an approved CDO.

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 OMWF.

This functionality allows CDOs to:

- Document your CACs' full legal names, email addresses, and CAC IDs.
- Monitor your CACs' Annual Assister Certification Training completion dates from the MLMS (date is populated from the MLMS once training is completed. Allow 24-48 hours for completion date to populate in the CAC Roster).
- Maintain your roster of CACs during your agreement period, typically every two (2) years.
- Give CACs access to the annual training by assigning each a unique CAC ID. CACs must **first** be listed on the CAC Roster to register for Annual Assister Certification Training.

Any of your organization's leadership contacts can access the OMWF and complete these actions.

NOTE: Maintaining a roster of active CACs using the OMWF is necessary for CACs to access Annual Assister 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.

---

2. How to Create and Assign Unique CAC IDs

2.1 CDO Organizational ID

CMS provides each Federally-facilitated Marketplace (FFM) CDO a unique organizational ID upon admittance to the CDO Program. This organizational ID is eight (8) alphanumeric characters specific to each CDO in the FFM (example NYCDOA12):

- The first two letters correspond to the state abbreviation where the CDO provides services; *if the CDO operates in Missouri, the first two letters will be MO, and if the CDO operates in multiple states, the first two letters will be US.*

- The next three letters reflect the Assister organization type; as a CDO, *the Assister organization type is CDO.*

- The last three alphanumeric characters indicate the entity character. *The CDO Program randomly assigns unique entity characters.*
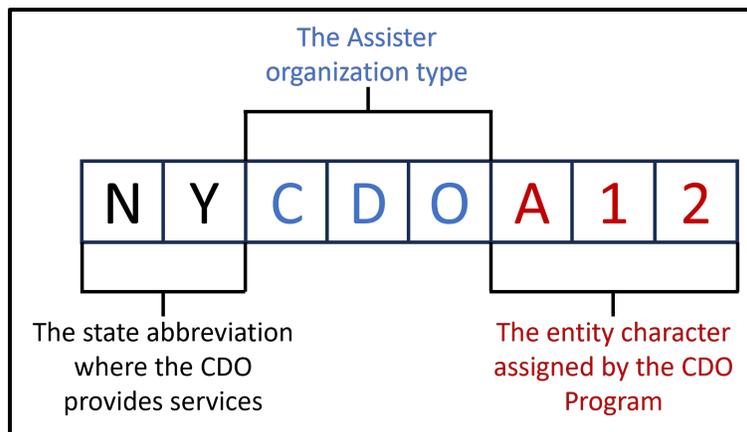
Figure 40: CDO Organizational ID Example

2.2 Assign CAC IDs

This organizational ID, provided by CMS to the CDO, will be used as the base ID when creating unique CAC IDs for each individual. CDOs must maintain and monitor the assigned CAC IDs for its staff and volunteers using the CAC Roster.

1. Take your 8-character CDO Organizational ID, e.g., NYCDOA12;

2. Add five numbers to the end of the CDO ID, e.g., NYCDOA12**00001** to create a unique CAC ID with 13 characters in total;

   a. Assign that number to staff/volunteer in ascending order, *e.g.,* NYCDOA12**00001**, NYCDOA12**00002**, NYCDOA12**00003**

3. Keep track of the assigned numbers using the CAC Roster on the OMWF;

4. CACs will be required to use their CAC IDs for MLMS training registration; and

5. CACs will provide their CAC IDs to consumers on applications that they have assisted with.

Here are a few tips when creating and assigning CAC IDs:

- **Each CAC ID should be unique and belong to a single owner.**

- Do not recycle CAC IDs. When a staff or volunteer stops serving as a CAC or leaves the organization, decertify that CAC ID; it should not be reassigned or recycled.

- The unique organizational ID assigned to your organization by CMS may be found in the Welcome Packet that the CDO received upon admittance into the CDO Program. The CDO ID can be found at the top of the OMWF, or by contacting the CDO Program office at CACQuestions@cms.hhs.gov

- Once you assign the CAC ID in the CAC Roster, be sure to share that with your CAC.

IMPORTANT: The CAC ID is case sensitive. When creating and assigning a CAC ID, please make sure that all the letters are CAPITALIZED.

---

3. Roster Order of Operations

CDOs will add their roster of active CACs using the OMWF. In order for CACs to be able to access the required Annual Assister Certification Training on the MLMS, they must first be listed on the CDO's CAC Roster in the OMWF.

Assign the CAC a unique CAC ID

Add the CAC to the Roster in the OMWF

CAC accesses and completes the annual assister certification

Verify the certification date on the CAC Roster from the MLMS once training is completed (after 24-48 hours)
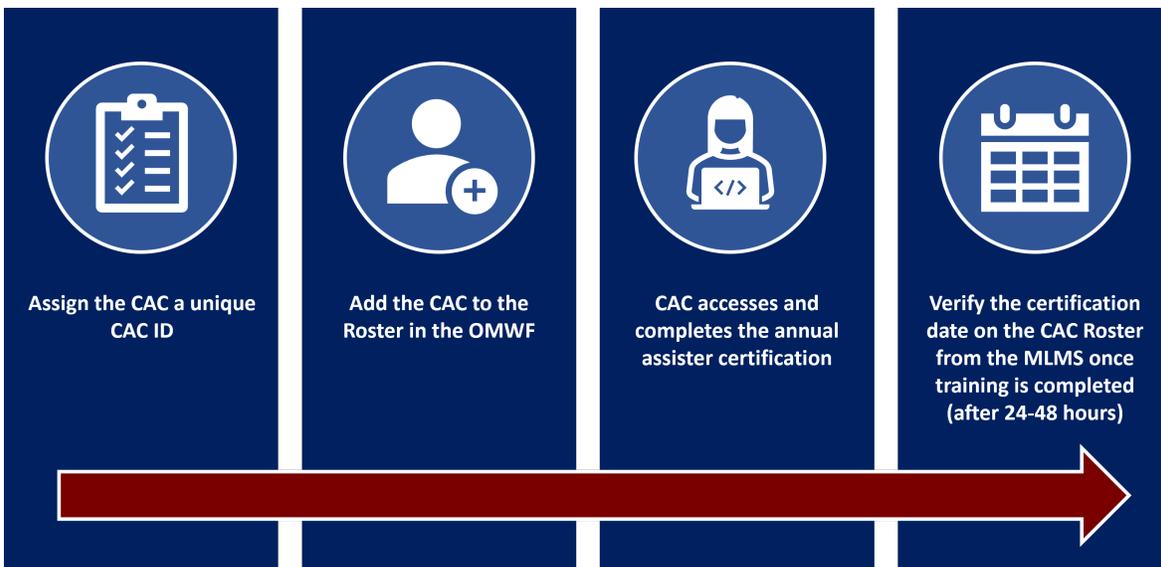
Figure 41: CAC Roster Order of Operations

4. How to add to the Roster

Gather all the necessary CAC data and have it readily available to complete all the information for the roster:

- Legal First Name (exactly as it appears in CMS Portal/MLMS)

- Legal Last Name (exactly as it appears in CMS Portal/MLMS)

- Email Address (business)

- 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)

- Note: If a CAC included a middle name in the CMS Portal Account, you should **omit it** from the CAC Roster, as there is no middle name field. *You should **not** add a middle name or middle initial to either the First or Last name field.*

CDOs have two options when adding your roster of CACs:

1. Manually submit information for each CAC individually using the OMWF. You can submit as many CACs as you like per session using this feature.

2. Send an email to CACQuestions@cms.hhs.gov with a list of CACs in an Excel file if you have more than 25 CACs to add at once. Please be sure to provide columns for Legal First Name, Legal Last Name, CAC ID, Email in your excel sheet.

On the OMWF, select the "CAC Roster" tab. The first time you access this tab, your 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 "CAC Roster" tab going forward.

4.1 Add CACs Individually

To submit information for each CAC individually:

1. Select **Add CAC.**

Figure 42: Add CAC Button

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.

2. On the "Add to Roster" pop-up, enter the CAC's Legal First Name, Legal Last Name, Email Address (business) and Current CAC ID of the CAC. If this person has a previous CAC ID, enter that information in the Previous CAC ID field (this is not required).

Note: This information must match EXACTLY with the information entered in the CAC's CMS Portal Account (Legal First Name, Legal Last Name).

3. Select **Add** if only adding one CAC or **Add and New** if adding multiple CACs.

Figure 43: CAC Roster Upload Instructions

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 24-48 hours of completion.

---

4. Review the Roster table on the "CAC Roster" page to confirm your entries.

4.2   Send CAC Roster via Email

If you have more than 25 CACs that you would like to upload at once, please send an email to CACQuestions@cms.hhs.gov with a list of CACs in an Excel file.

Please write "Need to add 25+ CACs to the CAC Roster" in the subject line and attach the Excel spreadsheet. If you are unable to submit an Excel spreadsheet, please include the following information in the body of the email for each CAC:

- Legal First Name

- Legal Last Name

- Current CAC ID

- Email Address

- Previous CAC ID (this field is not required)

5. Edits to existing Roster

During your agreement period, typically every two (2) years, a CAC's information may change and edits to the CAC Roster may be required. The *last name field* and the *email address field* are the ONLY two fields that can be edited on the CAC Roster.
To edit a CAC's Last Name or Email Address:

1. Navigate to the Roster table on the "CAC Roster" tab and select the **Edit** icon.

First Name ⇅	Last Name ⇅	Current CAC ID ⇅	Previous CAC ID ⇅	Training Completion Date ⇅	Decertification Date ⇅	Certification Status ⇅	Email Address ⇅	Actions
Ty	Stevens	FLCDOB1800001		12/21/2023		Certified	ty@email.com	✏️ 👤

Figure 44: Edit CAC Icon

Note: The OMWF will not permit you to edit the First Name, Current CAC ID, Previous CAC ID, Training Completion Date or Decertification Date fields. For edits to this data, you need to decertify the CAC and add them back to your roster using their new information. Refer to Decertifying a CAC.

You cannot modify the Training Completion Date field. The system will automatically populate this field within 24-48 hours of the user completing Annual Assister Certification Training on the MLMS.

---

2. On the "Edit CAC" pop-up, you can edit the individual's Last Name and/or Email Address. Once you make your changes, select **Save**.

Add to Roster

Legal First Name*
Ty

Legal Last Name*
Stevens

Email Address*
ty@email.com

Current CAC ID*
FLCDOB1800001

Previous CAC ID (optional)

Cancel   Save

Figure 45: Edit CAC Fields and Save Button

6. Track CAC Status

The Roster table on the "CAC Roster" page is a tool you can use to track the Certification Status and Training Completion Date for the Annual Assister Certification Training for each of your CACs.

- **Certification Status** – The status will be listed as: *Not Certified, Certified, De-Certified*, or *Expired*.

- **Training Completion Date** – The date on which the CAC completed the Annual Assister Certification Training as populated by the Marketplace Learning Management System (MLMS).

Roster

First Name	Last Name	Current CAC ID	Previous CAC ID	Training Completion Date	Decertification Date	Certification Status	Email Address	Actions
Elise	Ramirez	ALCDOA3567893		01/11/2024		Certified	elise.ramirez@test.tst	✏ 👤
Kimberly	Anderson	ALCDOA3561234	LACDOA7654321	04/23/2023	01/02/2024	De-Certified	kim.anderson@test.tst	
Heegi	Yun	ALCDOA3569012					heegi.yun@test.tst	✏ 👤

Figure 46: CAC Roster Table

Note: You cannot modify the Training Completion Date field. The system will automatically populate this field within 24-48 hours of the user completing Annual Certification training on the MLMS.

The Roster table also includes the following CAC information:

- **Decertification Date** – The date in which your organization deactivated the CAC from your roster using the OMWF (if applicable)

- **Contact Information** – Legal first name, legal last name, and email address

- **Current CAC ID** – Active CAC ID associated with your organization that the CAC uses to complete Assister Certification Training annually

- **Previous CAC ID** – Any other ID a CAC has held with previous organizations or your organization that is no longer in use

Email any questions to CACQuestions@cms.hhs.gov. Be sure to include your organization's name and CDO ID in the body of your email.

7. Decertifying CACs

*NOTE: It may take up to 24-48 hours after completing certification training before the Training Completion Date and Certification Status fields update in the Roster table. If a certification status is not populating in the Roster table, **DO NOT** decertify the CAC. Please email CACQuestions@cms.hhs.gov to help resolve the issue.*

Decertifying a CAC means this person can no longer assist consumers as a CAC with your organization using the assigned CAC ID in the table.

Warning! This action cannot be undone.

Reasons to decertify:

- If edits are needed to the CAC's first name or CAC ID the CAC would need to be decertified, then added back to the CAC Roster with the updated information and new CAC ID.

- If the CAC's assister certification expires, you will need to add the CAC back on the CAC Roster, issuing a new CAC ID.

- When a CAC leaves the organization or remains with the organization but no longer assists consumers as a CAC for that plan year, you should decertify this person.

You can use the OMWF to document these changes by decertifying the CACs who require these changes.

1. On the "CAC Roster" tab, in the Roster table, identify the individual you want to decertify.

2. Select the **Decertify** icon in the Actions column.

First Name ⇅	Last Name ⇅	Current CAC ID ⇅	Previous CAC ID ⇅	Training Completion Date ⇅	Decertification Date ⇅	Certification Status ⇅	Email Address ⇅	Actions
Ty	Stevens	FLCDOB1800001		12/21/2023		Certified	ty@email.com	🖉 👤

Figure 47: Decertify Icon

3. The system will confirm that you want to decertify the individual. Select **OK**.

- **Remember!** 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.

Figure 48: Decertify CAC Pop-up Window OK Button

4. The system will update the Roster table on the "CAC Roster" tab to list the decertification date and move the contact to the bottom of the table.

Roster

First Name ⇕	Last Name ⇕	Current CAC ID ⇕	Previous CAC ID ⇕	Training Completion Date ⇕	Decertification Date ⇕	Certification Status ⇕	Email Address ⇕	Actions
Elise	Ramirez	ALCDOA3567893		01/11/2024		Certified	elise.ramirez@test.tst	🖉 👤
Kimberly	Anderson	ALCDOA3561234	LACDOA7654321	04/23/2023	01/02/2024	De-Certified	kim.anderson@test.tst	
Heegi	Yun	ALCDOA3569012					heegi.yun@test.tst	🖉 👤

Figure 49: Roster Table

Notes: *If a user who you previously decertified returns to your organization or wishes to continue assisting consumers, you must assign this individual a new CAC ID and add them back to your CAC Roster using the steps in the* CAC Roster *section.*

REMEMBER! *It will take up to 24-48 hours after completing certification training before the Training Completion Date and Certification Status fields update in the CAC Roster table. If a certification status is not populating in the CAC Roster table,* ***DO NOT*** *decertify the CAC. Please email* CACQuestions@cms.hhs.gov *to help resolve the issue.*

C. Active CDO Renewals

1. Renewal Cycle

CMS certifies CDOs on a specific timeframe, typically two years. To renew your CDO agreement, one of your leadership contacts (Organization Senior Official (OSO), CAC Project Director, or Secondary Contact, if applicable) should access the OMWF to update your organization's information and submit a new CMS-CDO Agreement to your OSO for signature via DocuSign.

2. Renewal Reminder

CDOs will get Renewal reminders beginning 30 calendar days prior to their organization's expiration date. Additional Renewal reminders will be sent to CDOs at 21 days, 14 days, 7 days, and 1 day prior to the organization's expiration date.

If not renewed by the expiration date, your organization will become inactive and be removed from the CDO Program. If inactive, your organization will need to *re-apply* to the CDO Program, since your CDO ID will no longer be valid. Per the CMS-CDO Agreement, your organization must also instruct your CACs to stop providing enrollment assistance as CACs.

Your organization's expiration date is available in the Agreement PDF table on the "Organization Maintenance" page of the OMWF. For any questions about the expiration date, email CACQuestions@cms.hhs.gov.

Agreement PDF

File Name ⬍	Upload Date ⬍	CDO ID ⬍	Status ⬍	Approval Date ⬍	Renewal Opens ⬍	Expiration Date ⬍	Action
CDO_Agreement.pdf	7/20/2023 4:09 PM	ALCDOA36	Active	7/20/2023	6/21/2025	7/20/2025	View
CDO_Appendix_A.pdf	7/20/2023 4:09 PM	ALCDOA36	Active	7/20/2023	6/21/2025	7/20/2025	View
CDO_COI_Attestation.pdf	7/20/2023 4:09 PM	ALCDOA36		7/20/2023	6/21/2025	7/20/2025	View

Figure 50: Expiration Date on the "Organization Maintenance" tab of the Maintenance Web Form

3. Renewing the CMS-CDO Agreement

CMS recommends CDOs review and update their organization's information before replacing their CMS-CDO Agreement. To review and update your organization's information, refer to Section 3.

To replace your existing CMS-CDO Agreement with a new agreement, refer to Section 4.1.

3.1 Signing the CMS-CDO Agreement with DocuSign

The OSO will receive an email from DocuSign to review the document and sign the CMS-CDO Agreement.

Note: Please be sure to add dse@Docusign.net to your organization's approved emails list and check your spam folder for messages from this email address.

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1. The Organization Senior Official (OSO) reviews the DocuSign agreement:

   a. Open the email from dse@Docusign.net and review the message from DocuSign.

   b. Select **REVIEW DOCUMENT** to begin the signing process.
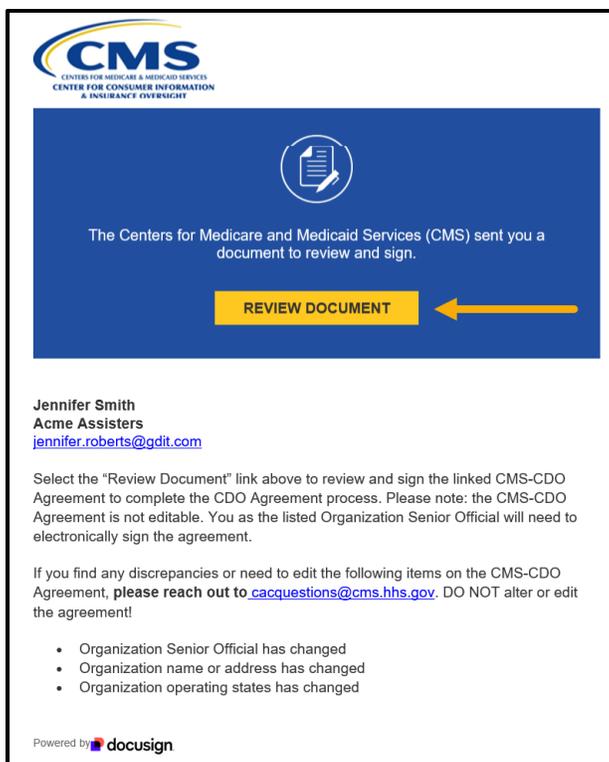
Figure 51: DocuSign email with Review Document link

c. Review the disclosure and select the checkbox **"I agree to use Electronic Records and Signatures".**

d. Select **CONTINUE** to begin the signing process.

Please read the Electronic Record and Signature Disclosure.
☑ I agree to use electronic records and signatures.

CONTINUE

Figure 52: I agree to use Electronic Records and Signatures and Continue button

2. Next, the OSO will start the signing process:

a. Review the CMS-CDO Agreement in DocuSign.

○ If the information on the agreement is out of date, or any changes are necessary, please contact CACQuestions@cms.hhs.gov. Do not make edits to the agreement!

b. Select **START** when ready to sign, then select the **SIGN** tag.

Figure 53: Start tag
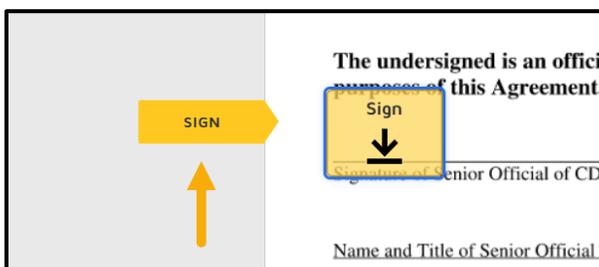
Figure 54: Sign tag

3. Next, the OSO will Adopt a Signature:
a. Verify that your name and initials are legible. If not, please update them as needed.

b. Select **ADOPT AND SIGN** to adopt and save your signature and return to the document.

Figure 55: Adopt a Signature

4. Finally, the OSO will initial and sign the agreement:

   a. Initial to attest to agree with each COI statement.

   b. Sign the CMS-CDO Agreement.

   c. When finished signing, select **FINISH**.

Figure 56: Finish button

5. A message will appear stating that you have completed the document.

6. The OSO will receive a copy of the signed CMS-CDO Agreement as an attachment in their email.

   a. **Note**: If they do not receive acknowledgement of their submission, they need to make sure they signed their agreement with DocuSign or contact CACQuestions@cms.hhs.gov.
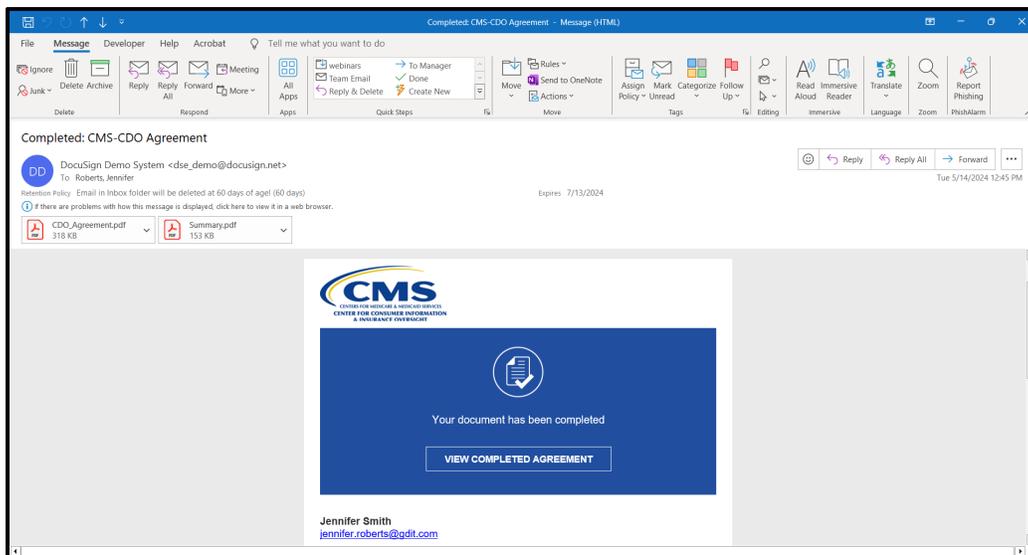
Figure 57: Email with signed CDO Agreement Attached

WARNING: While an agreement is under review by CMS, the organization's account is locked, and you will be unable to edit your organization information. After receiving a response email, your account will be unlocked again, and you will then be able to edit the organization's information using the OMWF. You will however still be able to add or edit CACs on the "CAC Roster" tab.

D. Tips and Troubleshooting

1. OMWF Tips and Troubleshooting

FAQ 1. What do we need to do to maintain our CDO status over the two-year certification period?

- **Answer:** During your certification period, typically two years, your organization needs to:
  - Ensure your CACs complete their Annual Assister Certification training each year and maintain your CAC Roster per Section II, 1 & 4 (Obligations and Conditions) of the CMS-CDO Agreement.
  - Keep your CDO information current per Section II, 5 & 6 (Obligations and Conditions) of the CMS-CDO Agreement.

Per Section II, 1-4 (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 CAC ID, ensure and confirm their completion of the annual federal assister training, and require that each CAC enter into a written, signed CDO-CAC model agreement. Your organization's leadership contacts can then access the OMWF to add and maintain your organization's CAC Roster.

To keep your CDO information current, your organization must update your CDO record if any changes occur to the following: organization name, address, list of leadership contacts, service locations, enrollment assistance type (open enrollment only or year-round), and specialty areas. Your organization's leadership contacts can then access the OMWF to make these updates.

If you update your organization name, Organization Senior Official contact information, headquarters' address, or add or remove service locations, the OMWF will prompt you to upload a new signed and dated CMS-CDO Agreement.

FAQ 2. Who can access the OMWF?

- **Answer:** Only your Organization Senior Official, CAC Project Director, or Secondary Contact (if applicable) can access the OMWF. These individuals must use the email address entered on the CDO application when creating an access code for the OMWF.

While you complete the CDO application, you will designate up to three leadership contacts to correspond with CMS on behalf of your CDO moving forward.

FAQ 3. Why am I unable to log in to the OMWF?

- **Answer:** When logging in to the OMWF, you need to:
  - o Make sure your organization record lists you as one of your organization's leadership contacts: Organization Senior Official, CAC Project Director, or Secondary Contact (if applicable).
  - o Use the email address entered on the application.
  - o Create an access code (password) the first time you log in.

If you continue to experience technical issues, email us at CACQuestions@cms.hhs.gov and include the list of steps you were taking prior to receiving an error message, along with an attached screenshot.

Note: New CDO applicants can only access the OMWF after receiving a Welcome Approval email from CMS upon the approval of your CDO application. Moving forward, you will access the OMWF to keep your information up to date with CMS.

FAQ 4. My security question responses are not working. What do I do?

- **Answer:** Please email CACQuestions@cms.hhs.gov to reset your security questions.

FAQ 5. What should we do if we experience technical issues with the CDO Application Web Form or CDO Organizational Maintenance Web Form (OMWF)?

- **Answer:** If you encounter technical issues when accessing the CDO Application Web Form or OMWF, email us at CACQuestions@cms.hhs.gov and include the list of steps you were taking prior to receiving the error message along with an attached screenshot

FAQ 6. Can anyone from my organization sign the CMS-CDO Agreement?

- **Answer:** No, only an official authorized to represent and bind your organization for purposes of the CMS-CDO Agreement may sign the CMS-CDO Agreement. You will list this person as the Organization Senior Official in your CDO Application.

  If the responsible entity changes after CMS approves your organization as a CDO, your organization must update its information on record with CMS and replace a new CMS-CDO Agreement using the OMWF.

FAQ 7. I signed CMS-CDO Agreement, and it keeps getting rejected. Why?

- **Answer:** CMS will not accept your signed CMS-CDO Agreement if any of the following information is missing or does not match your organization's approved corresponding CDO application:
  - Service location(s)
  - Signature of Organization Senior Official
  - Organization Senior Official Name and Title
  - Date of signature
  - Organization Name
  - Corresponding Application ID
  - Organization address
  - Conflict of Interest Attestation

  You cannot make any edits to the agreement at this point. If you need to make changes, navigate to the "Organization Maintenance" tab of the OMWF, make edits and replace the agreement.

FAQ 8. What happens if I do not sign the CMS-CDO Agreement?

- **Answer:** New applicants that do not sign the CMS-CDO Agreement after receiving Preliminary Approval from CMS will not become a CDO. Only organizations that signed their CMS-CDO Agreement within in the required timeframe and receive a CDO ID from CMS can certify staff or volunteers as CACs. Signing a CDO application is only the first step of the application process. To complete the process, the Organization Senior Official must sign the CMS-CDO Agreement for CMS to review, and your organization must receive final approval from CMS.

Existing CDOs must renew *before* your agreement and CDO certification expires, or you will become inactive. If this happens, your organization will need to re-apply since your CDO ID will no longer be valid. Per the CMS-CDO Agreement, you must also instruct your CACs to stop providing enrollment assistance as CACs.

FAQ 9. My CDO is not due for renewal, but the system is requiring me to generate a new CMS-CDO Agreement. Why?

- **Answer:** You are receiving a message to generate a new CMS-CDO Agreement because one of your contacts updated your organization's information, and these changes require a new CMS-CDO Agreement.

- Updating the following information triggers the need for an updated CMS-CDO Agreement:

    o Organization name change

    o Changes to the Organization Senior Official's contact information
    Note: If the Senior Official of the organization has changed, a new COI attestation must be completed.

    o Changes to your headquarters' address

    o Adding or removing service locations

FAQ 10. I submitted an agreement, but CMS requested a revision or resubmission. How do I proceed?

- **Answer:** After CMS reviews your CMS-CDO Agreement and determines that we need you to resubmit the agreement or revise the agreement, we will send your leadership contacts an email with details regarding what information you need to edit or resubmit.

    Edits or resubmissions may include having the Organization Senior Official attest to the statements on the COI Attestation form and sign the last page of the agreement. If the signature does not **match** the Organization Senior Official listed on your application, we will not accept your agreement.

    Before sending your agreement for signature, please review pages 1 and 12 of the agreement and confirm your organization information. If any information is incorrect, return to the OMWF and edit your organization information on record. Remember to save and submit any edits. Then, replace your agreement.

FAQ 11. I do not have a Replace link in the Agreement PDF table. How do I replace my existing CMS-CDO Agreement?

- **Answer:** If the **Replace** link is not available on the "Organization Maintenance" tab of the OMWF your previously submitted agreement may be under CMS review, and your record is locked. Once CMS sends you a determination email identifying whether CMS accepts your CMS-CDO Agreement or not, you can access the OMWF and select the **Replace** link in the Agreement PDF table.

    If you are unsure if your organization submitted an agreement recently, please contact us at CACQuestions@cms.hhs.gov.

FAQ 12.The OMWF will not let me add my state in the "Service Location" section. Why?

- **Answer:** If your state operates a State-based Marketplace (SBM) or State-based Marketplace using the Federal Platform (SBM-FP), the OMWF **not list** your state in the "Service Location" state picklist.

  If you are not sure what Marketplace type your state operates, email us at CACQuestions@cms.hhs.gov.

2. CAC Roster Tips and Troubleshooting

FAQ 1. What is a CAC?

- **Answer:** In a Federally-Facilitated Marketplace (FFM), a Certified Application Counselor (CAC) is an individual staff member or volunteer who is certified by a Certified Application Counselor Designated Organization (CDO). CAC's are trained and able to help consumers as they consider health coverage options through the Marketplace, including helping them complete the Marketplace eligibility and enrollment process. Their services are free to consumers.

FAQ 2. Who can maintain our CAC Roster?

- **Answer:** Any of your organization's leadership contacts can access the OMWF to add and maintain your CAC Roster.

FAQ 3. What is the purpose of CAC IDs?

- **Answer:** Per Section II.2.b.i (Obligations and Conditions) of the CMS-CDO Agreement, as authorized by 45 CFR 155.225, a CDO issues unique CAC IDs for staff and volunteers, which Assisters need in order to take the Annual Assister Certification Training on the MLMS.

  In addition, per Section II.2.b.x.7 (Obligations and Conditions) of the CMS-CDO Agreement, as authorized by 45 CFR 155.225, consumers must enter a CAC's ID into their Marketplace application when receiving enrollment assistance from a CAC.

FAQ 4. How do I edit the training certification date?

- **Answer:** You cannot modify the Training Completion Date field. The system will automatically populate this field within 24-48 hours once your CACs complete the Assister certification training in the Marketplace Learning Management System (MLMS).

  For additional assistance with the Assister certification training, please contact the MLMS team at MLMSHelpDesk@cms.hhs.gov.

FAQ 5. Why is the OMWF not accepting the CAC ID I am entering in the CAC Roster section?

- **Answer:** The OMWF will not accept a CAC ID if:
  - Your CAC ID does not contain 13 characters.
  - You are using an old CAC ID (i.e., the root ID has "CAC" in it instead of "CDO").
  - Another CAC on your roster has the same CAC ID (each ID must be unique).

o   You are using a CAC ID affiliated with a decertified CAC (organizations should not recycle old IDs).

o   Another CDO lists the CAC as a leadership contact or as a CAC on their roster. If the CAC left that organization, the previous CDO must remove them as a contact or decertify them and remove them from their CAC Roster.

If you have questions about errors you are receiving, contact us at CACQuestions@cms.hhs.gov and include a screenshot of the error message you are receiving.

To access further instructions for maintaining your CAC Roster, visit the Information for Active CDOs web page.

FAQ 6.   What should I enter into the Previous CAC ID field?

- **Answer:** The Previous CAC ID field is optional. The intent of this field is to allow organizations to enter a CAC's previous CAC ID assigned to them by another organization or previously assigned to them by your organization.

FAQ 7. I am receiving the following error message when attempting to add a CAC to my roster: "*The CAC ID you are attempting to add is affiliated with a decertified contact in the system. You must assign this individual a new CAC ID to proceed***." What does this mean?**

- **Answer:** This error message means that you are attempting to add an individual you previously decertified from your CAC Roster using the same CAC ID they were previously assigned. Once you decertify an individual on your CAC Roster, you will need to assign them a new CAC ID to add them back to your roster.

   To add an individual back to your CAC Roster:

   1.   Assign the individual a new CAC ID.

   2.   On the OMWF, navigate to the Roster section of the "CAC Roster" tab.

   3.   Select the **Add CAC** button.

   4.   On the "Add to Roster" pop-up, add the contact and select the **Save** button.

   If this issue persists, email us at CACQuestions@cms.hhs.gov for assistance.

FAQ 8.   I am receiving the following error message when attempting to add a CAC to my roster: "*The CAC contact you are attempting to add is already listed as an active contact under this organization***." What does this mean?**

- **Answer:** This error message means that you already have the individual you are adding to your CAC Roster listed on your existing roster. You can only list an individual once on your CAC Roster using the same email address and/or CAC ID.

   o   You can only edit a CAC's last name and email address. All other changes require you to decertify the CAC and add them again either manually or by sending an email to CACQuestions@cms.hhs.gov

- o   If you need to edit the individual's last name or email address:
    - ▪ 1. On the OMWF, navigate to the Roster section of the "CAC Roster" tab.
    - ▪ 2. Locate the individual you need to modify and select the **Edit** icon in the Actions column of the CAC table.
    - ▪ 3. On the "Edit CAC" pop-up, modify the CAC's last name or email address (these are the only editable fields) as needed.
    - ▪ 4. Select the **Save** button.

    If this issue persists, email us at CACQuestions@cms.hhs.gov for assistance.

FAQ 9. **I am receiving the following error message when attempting to update my Organization Senior Official, CAC Project Director, or Secondary Contact: "*The contact you are attempting to add is already assigned to a different organization.*" How do I proceed?**

- • **Answer:** This error message means that another organization lists the individual you are adding as one of your leadership contacts as a CAC on their CAC Roster. Individuals cannot serve as a contact (i.e., Organization Senior Official, CAC Project Director, and Secondary Contact) for one CDO while serving as a contact for another CDO.

    To resolve this issue, the individual you are adding should contact their previous CDO and ask the organization to decertify them from the organization's CAC Roster. Once the organization decertifies the individual as a CAC for their organization, you can add the individual as one of your leadership contacts using the OMWF.

    If this issue persists, email us at CACQuestions@cms.hhs.gov for assistance.

FAQ 10. **I am receiving the following error message when attempting to add a CAC to my roster: "*The CAC contact you are attempting to add is already assigned to a different organization.*" What does this mean?**

- • **Answer:** This error message means that the CAC contact you are trying to add to your CAC Roster is already listed on another CDO's CAC Roster. Individuals cannot serve as a CAC for one CDO while serving as a CAC for another CDO.

    To resolve this issue, the individual you are adding to your CAC Roster should contact their previous CDO and ask the organization to remove them from their CAC Roster. Once the organization does this, you can add the individual as one of your CACs on your CAC Roster using the OMWF.

- • If this issue persists, email us at CACQuestions@cms.hhs.gov for assistance.

3. CDO Renewals Tips and Troubleshooting

FAQ 1. **Where can we learn more about renewals?**

- • **Answer:** You can find the existing CDO renewal information by visiting the Information for active CDOs web page.

FAQ 2. How do I know when I need to renew the CMS-CDO Agreement as an existing CDO?

- **Answer:** Per Section IV.1 (Effective Date; Term and Renewal) of the CMS-CDO Agreement, at the end of each two-year CDO term, organizations must renew participation in the CDO Program by updating their organization information in the OMWF, sending a new CMS-CDO Agreement to their OSO using the DocuSign feature in the OMWF before the expiration date of the organization's CMS-CDO Agreement and certification period.

    You can find your expiration date on the "Organization Maintenance" tab of the OMWF, or you can email us at CACQuestions@cms.hhs.gov. You will also receive a reminder email from CMS 30 days before your renewal date.

FAQ 3. What happens if we do not renew the CMS-CDO Agreement before its expiration?

- **Answer:** If you do not renew your CDO certification with CMS before your agreement and CDO certification expires, you will become inactive. If this happens, your organization will need to re-apply since your CDO ID will no longer be valid. Per the CMS-CDO Agreement, you must also instruct your CACs to stop providing enrollment assistance as CACs.

FAQ 4. How long is the renewal good for?

- **Answer:** Per Section IV.1 (Effective Date; Term and Renewal) of the CMS-CDO Agreement, successful renewal re-certifies your organization as a CDO for two years from the effective date of the newly dated and signed CMS-CDO Agreement.

FAQ 5. Should I review my organization's existing information (contacts, service area, etc.) before submitting a new signed and dated CMS-CDO Agreement?

- **Answer:** Yes, we recommend reviewing and updating (if necessary) all of your organization's information prior to submitting a new CMS-CDO Agreement. This will reduce the likelihood of CMS not accepting your agreement because the information in the agreement does not match our records.

FAQ 6. What if we do not want to renew our CDO status and want to leave the program?

- **Answer:** If you would like to withdraw from the CDO Program anytime during your two-year certification period, per Section II.6 (Obligations and Conditions) and Section V (Termination) of the CMS-CDO Agreement, as authorized by 45 CFR 155.225, you must, among other things:

    1. Send a formal written request to CMS at CACQuestions@cms.hhs.gov at least 30 business days prior to the date that you intend for the CMS-CDO Agreement to terminate, where practicable. The written request should include your CDO ID and the date when your CMS-CDO Agreement will terminate.

    2. Notify your organization's staff and volunteers that, as of the effective date of termination of its agreement with CMS, they will no longer be certified to 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.

3. Keep in mind that consumer consent documents must be appropriately secured and retained for no less than six years, unless a different and longer retention period has already been provided under other applicable federal law. Your organization's duty to protect and maintain the privacy and security of personally identifiable information (PII) survives its withdrawal from the CAC 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).

4. Submit a request to CMS to remove your organization's listing(s) from Find Local Help using the Find Local Help Upkeep Tool at least seven business days before your organization will cease providing CAC services to the public, and in the event that such advance notice is not feasible, in no more than 24 hours after your organization has ceased providing CAC services to the public.

   For service location assistance, please refer to Find Local Help resources:

   - FLH Upkeep Tool
   - FLH Upkeep Tool User Guide
   - FLH Upkeep Tool FAQs

FAQ 7. I submitted my renewal CMS-CDO Agreement. Are there other tasks my organization must complete at this time?

- **Answer:** After CMS approves your CMS-CDO Agreement, you should add your CAC Roster or review your existing CAC Roster and make any necessary changes.

  Maintaining a roster of your existing CACs using the OMWF is necessary for your CACs to access Annual Assister Certification Training on the Marketplace Learning Management System (MLMS).

  This feature will not automatically assign CAC IDs for you; your CAC Project Director is still responsible for assigning CAC IDs.

FAQ 8. Do I need to resubmit the COI Attestation when I renew my status?

- **Answer:** Yes. The Organization Senior Official must complete a COI Attestation form during the CDO renewal process in order to meet CMS regulations prohibiting certain relationships.

FAQ 9. As an existing CDO, can I just resubmit my initial CMS-CDO Agreement from two years ago to complete the renewal?

- **Answer:** No. To renew your CDO certification, a leadership contact must access the OMWF and replace and send a new dated CMS-CDO Agreement to the OSO using DocuSign. The Organization Senior Official must also complete a new COI Attestation form during the CDO renewal process in order to meet CMS regulations prohibiting certain relationships.

  If you do not renew your CDO certification before its expiration date, you will become inactive. If this happens, your organization will need to re-apply, since your CDO ID will no longer be valid. Per the CMS-CDO Agreement, you must also instruct your CACs to stop providing enrollment assistance as CACs.

FAQ 10. I replaced a renewal agreement, and now I can't update anything else on the Organization Maintenance tab. Why?

- **Answer:** After you replace a new 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, and your record is locked. You will however be able to add CACs to the roster on the "CAC Roster" tab. After receiving a determination email, you will be able to edit your organization's information using the OMWF.

FAQ 11. If our initial leadership contacts have all changed, how do we access the OMWF to renew?

- **Answer:** If none of your initial leadership contacts are with your organization, please email us at CACQuestions@cms.hhs.gov and provide the following information for each of your new contacts:
  - Full Name
  - Title that person is assuming within your CDO – Organization Senior Official, CAC Project Director, or Secondary Contact (optional)
  - Job title
  - Phone number
  - Email address

  Once we receive this information, we will update your organization's contact list and will send the new contacts a Welcome Packet email with your organization's CDO ID, the counter-signature page of the CMS-CDO Agreement, and critical information about the CAC Program.

E. Glossary

Term	Definition
ACA	The Affordable Care Act (ACA) is the comprehensive health care reform law enacted in March 2010 (sometimes known as ACA, PPACA, or "Obamacare").
Agents and Brokers	Are compensated by insurance companies or consumers, consistent with state law and operate in FFMs, SBMs, and SBM-FPs
CACs	Certified Application Counselors (CACs) are trained to provide unbiased assistance and are able to help consumers seeking health insurance coverage options through an FFM.
CAC ID	Each CAC in your organization must have a unique CAC ID. CDOs must maintain and monitor the assigned CAC IDs for its staff and volunteers using the CAC Roster.

Term	Definition
CAC Project Director	This individual is responsible for maintaining compliance with CDO requirements, certifying CAC staff and volunteers, maintains the CAC roster, keeping CAC certification records, and updating organization information with CMS.
CDO	Certified Application Counselor Designated Organizations (CDOs) are organizations who currently assist with CDO Program with the Centers for Medicare & Medicaid Services (CMS) and have CACs.
CDO Application	The CDO Application Web Form is the platform organizations use to submit CDO applications to CMS.
CMS	The Centers for Medicare and Medicaid Services
COI	The Conflict of Interest (COI) Attestation section of the CDO Application allows the OSO to disclose of actual or potential conflicts of interest by completing the Company, Type of Relationship, and Content Area fields.
DocuSign	DocuSign is the website where the OSO will electronically sign the approved CMS-CDO agreement.
FFM	Federally-facilitated Marketplaces (FFM) are in states where HHS performs all Marketplace functions. Consumers can apply for coverage at HealthCare.gov.
FLH Upkeep Tool	The Find Local Help (FLH) Upkeep Tool may be used for the following purposes: • Listing and unlisting your organization on Healthcare.gov's FLH search tool. • Making changes to your organization's FLH locations.
MLMS	The Marketplace Learning Management System (MLMS) is site where CACs are able to access the required annual certification training.
Non-QHP	Non-Qualified Health Plans (Non-QHP) are health insurance plans that don't follow the ACA health insurance guidelines.

Term	Definition
OMWF	The Organization Maintenance Web Form (OMWF) is the platform organizations use to: • Keep their CDO record up to date; • Add and maintain their roster of CACs; and • Submit a new signed and dated CMS-CDO Agreement and COI Attestation to renew their CDO status typically every two years.
OSO	The Organization Senior Official (OSO) is the individual that must complete the application and sign the CMS-CDO Agreement. Therefore, they must have the authority to both legally and financially bind the organization.
PHI	Protected Health Information (PHI) specifically refers to health information shared with HIPAA covered entities. Medical records, lab reports, and hospital bills are PHI, along with any information relating to an individual's past, present, or future physical or mental health.
PII	Personally Identifiable Information (PII) encompasses any information that can be directly or indirectly linked to an individual's identity.
Preliminary Approval Email	After you submit an initial CDO Application and COI Attestation, CMS will review the application. CMS will send a Preliminary Approval email to organizations that meet program requirements.
Term	Definition
QHP	A Qualified Health Plan (QHP) is a health insurance plan that meets requirements established by the Affordable Care Act (ACA) and meets the certification requirements of the state's health insurance exchange/marketplace.
Renewal	CMS re-certifies CDOs on a specific timeframe, typically two years.
Roster	CMS requires that CDOs add a roster of their active CACs using the OMWF. CDOs must maintain and monitor the assigned CAC IDs for its staff and volunteers using the CAC Roster.
Secondary Contact	This individual may serve as an additional contact that supports the CAC Project Director and is knowledgeable about the program's operations.

Term	Definition
Service Locations	The state(s) and county or counties in which your organization provides enrollment assistance services.
SBM	State Based Marketplaces (SBMs) are in states that independently manage all Marketplace functions. Consumers apply for cover through the state's Marketplace website.
SBM-FP	State Base Marketplaces using the Federal Platform (SBM-FP) are in states that rely on the federal Healthcare.gov website for eligibility and enrollment and independently manage all other Marketplace functions. Consumers apply for coverage at HealthCare.gov
Welcome Packet Email	An email from CMS that includes: your CDO ID and the counter-signature page of the CMS-CDO Agreement with the effective date of your agreement and CDO certification period, typically two years.

F. Resources

For additional help using the OMWF, please visit CDO Program Information.