CDO Renewal Job Aid

Overview

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

This job aid will explain how to:

- [Review and Update your CDO Information](#)
- [Upload a New Signed and Dated CMS-CDO Agreement](#)
- [Confirm Your Submissions](#)

Important notes:

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

- If you do not know your expiration date, you can email us at CACQuestions@cms.hhs.gov. You can also view your expiration date in the Agreement PDF table on the "CDO Summary" page of the maintenance web form.

Additional Help, Resources, and Troubleshooting

For additional CDO renewal process resources please access:

- [CDO Renewal Process Overview video](#)
- [CDO Learning Series – CDO Renewal video](#)
- [CDO Organizational Maintenance Web Form User Guide](#)

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- [CDO Organizational Maintenance Web Form Troubleshooting FAQs](#)

Renew and Update Your CDO Information

To update your organization's information during your agreement period, your leadership contacts should access the [CDO Organizational Maintenance web form](#).

Note*:* Your leadership contacts must use the email address entered on the CDO application when creating an access code or logging in to the maintenance web form.

From the "Welcome" page, you can access several resources for the various tasks completed using the maintenance web form. The User Guide provides detailed instructions on each of the maintenance web form tables, and the job aids specifically focus on tasks associated with CDO renewal, the CAC roster, and contact changes.
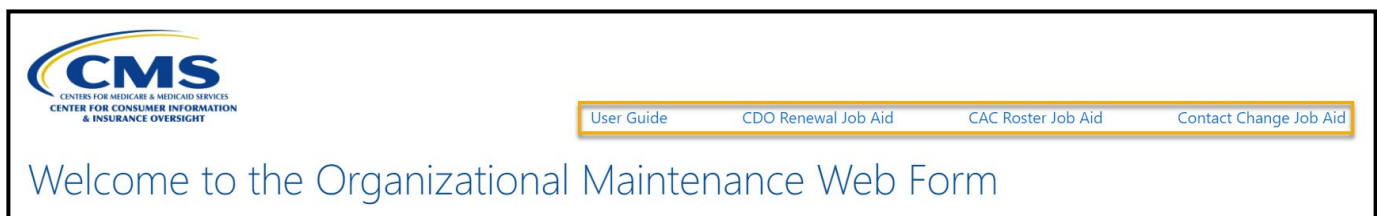

Figure 1: Welcome Page Resources

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

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

You are **not** required to submit a new, signed CMS-CDO agreement if you make any other change. 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.
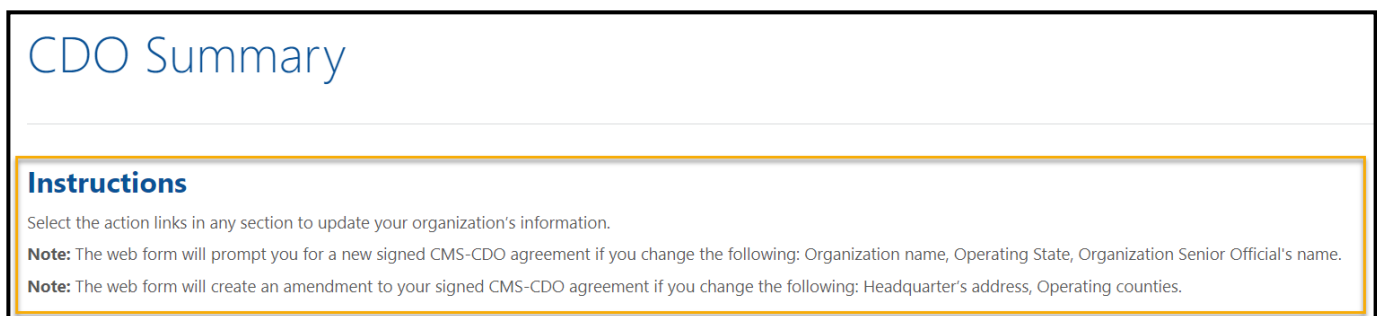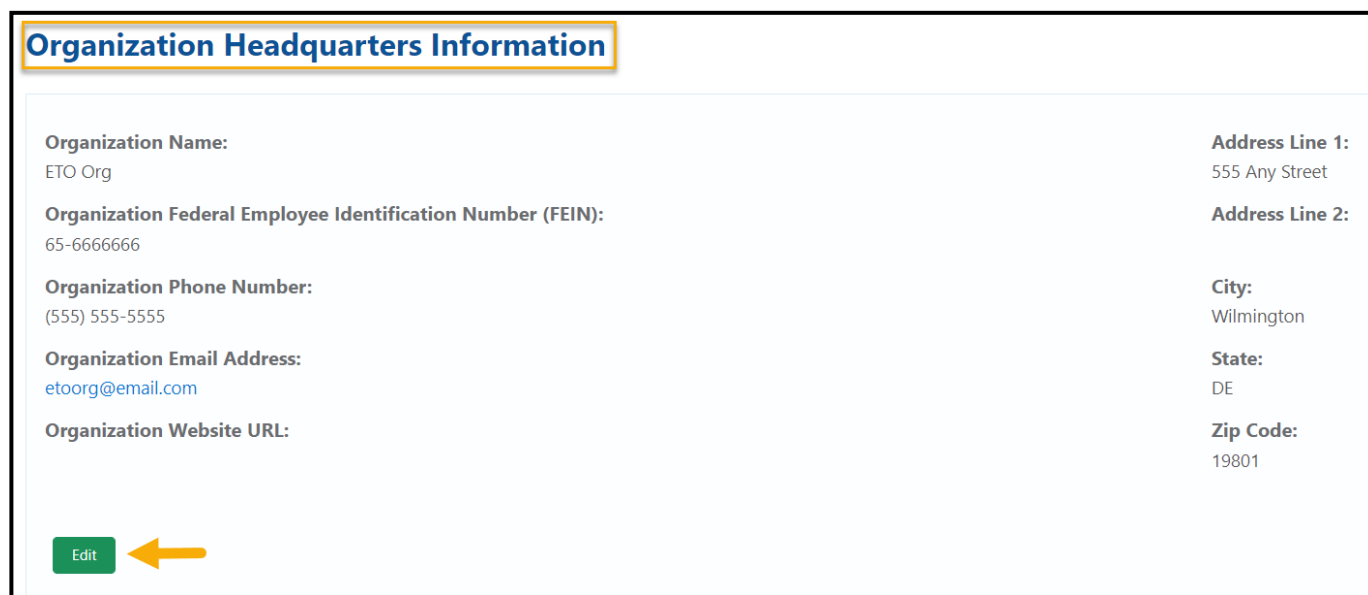

Figure 2: CDO Summary Instructions

Organization Headquarters Information

The Organization Headquarters Information table allows your leadership contacts to review and/or edit your organization's headquarters information.

To edit any of your organization's headquarters information:

1. Select **Edit** at the bottom of the Organization Headquarters Information table.

Organization Headquarters Information

Organization Name:
ETO Org

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

Organization Phone Number:
(555) 555-5555

Organization Email Address:
etoorg@email.com

Organization Website URL:

Address Line 1:
555 Any Street

Address Line 2:

City:
Wilmington

State:
DE

Zip Code:
19801

Figure 3: Organization Headquarters Information Table and Edit Button

2. On the "Organization Headquarters Information" page, update your information as needed.

3. When edits are complete, select **Save & Return**. The web form returns you to the "CDO Summary" page.

4. When finished with your changes, select **Submit** on the "CDO Summary" page at the top or the bottom of the page.

Service Locations

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

To edit your organization's service location states and/or counties:

1. Select **Edit** at the bottom of the Service Locations table. The web form navigates to the "Edit Service Locations" page.
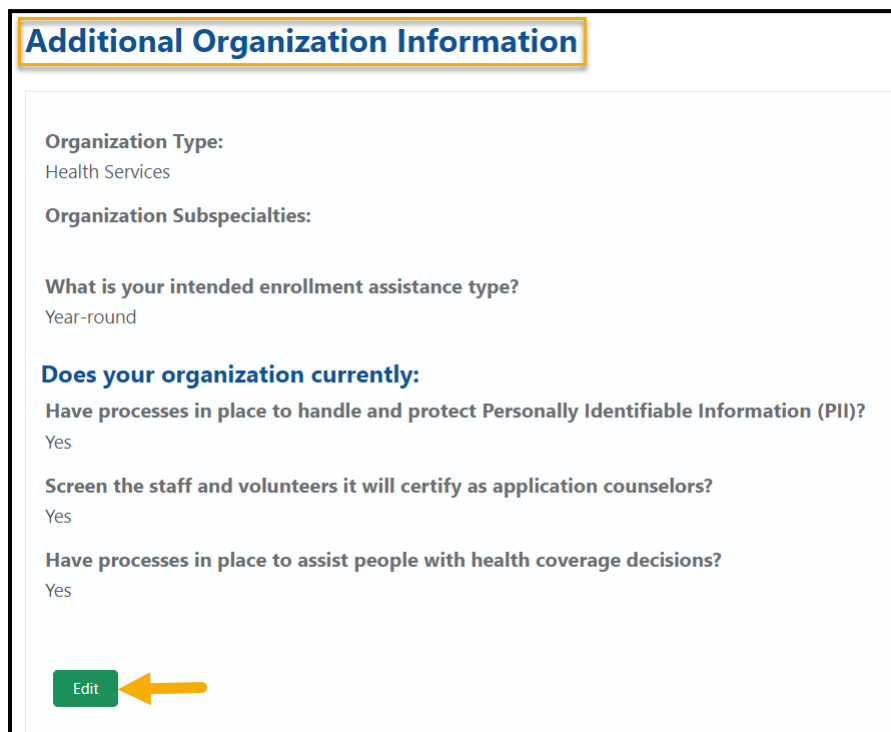

Figure 4: Service Locations Edit Button

2. On the "Edit 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.

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

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

5. To remove a county or state, select the state and move the list of counties from the Selected Counties table to the Available Counties table.

6. Select **Update Table**. The Service Locations table will include all service locations for the organization that you selected.

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

8. When edits are complete, select **Save & Return**. The web form returns you to the "CDO Summary" page.

9. When finished with your changes, select **Submit** on the "CDO Summary" page either at the top or the bottom of the page.

Additional Organization Information

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

To edit any of your organization's additional information:

1. Select **Edit** at the bottom of the Additional Organization Information table. The web form navigates to the "Edit Additional Organization Details" page.

Additional Organization Information

Organization Type:
Health Services

Organization Subspecialties:

What is your intended enrollment assistance type?
Year-round

Does your organization currently:
Have processes in place to handle and protect Personally Identifiable Information (PII)?
Yes

Screen the staff and volunteers it will certify as application counselors?
Yes

Have processes in place to assist people with health coverage decisions?
Yes

Edit

Figure 5: Additional Organization Information Edit Button

2. On the "Edit Additional Organization Details" page, update your organization's information as needed.

3. When edits are complete, select **Save & Return**. The web form returns you to the "CDO Summary" page.

4. When finished with your changes, select **Submit** on the "CDO Summary" page either at the top or the bottom of the page.

Contact Information

The Contact Information table allows your leadership contacts to review and/or edit information for your organization's contacts. Each organization is required to have an Organization Senior Official and a CAC Project Director. You may designate a third contact, referred to as the Secondary Contact, but it is not a CMS requirement.

Figure 6: Contact Information Manage Contacts Button

To edit or replace an existing contact's information:

1. Select **Manage Contacts** at the bottom of the Contact Information table.

2. On the "Edit Contact Information" page, make the necessary edits to any of the contact's information.

3. When edits are complete, select **Save & Return** either at the top or the bottom of the page.

4. When finished with your changes, select **Submit** on the "CDO Summary" page either at the top or the bottom of the page.

Upload a New Signed and Dated CMS-CDO Agreement

Once you have finished making your updates, you can upload a new signed and dated CMS-CDO agreement. You need to upload the entire agreement, including the COI Attestation form beginning on page 13, but you do NOT need to upload Appendix A. To do this, your leadership contacts should access the CDO Organizational Maintenance web form.

Note*:* Your leadership contacts must use the email address entered on the CDO application when creating an access code or logging in to the maintenance web form.
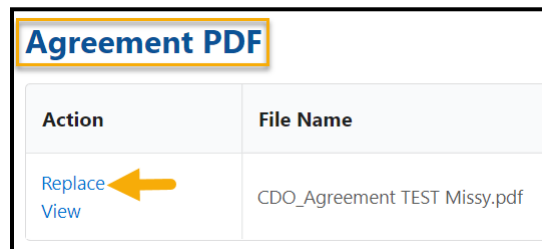
From the "CDO Summary" page, your leadership contacts can replace your existing CMS-CDO agreement with a new signed and dated version.

Thirty calendar days prior to your expiration date, your leadership contacts will have access to the **Replace** link in the Agreement PDF table on the "CDO Summary" page.

Note*:* Your leadership contacts will not be able to access the **Replace** link if the date is more than 30 calendar days prior to your organization's expiration date unless the contact updates your Organization Name, Operating State, and/or Organization Senior Official's name.

To generate your up-to-date signed CMS-CDO agreement:

1. Log in to the [CDO Organizational Maintenance Web Form](#).

2. In the Agreement PDF table on the "CDO Summary" page, select **Replace**.

Figure 7: Agreement PDF Table Replace Link

3. In the pop-up, select **OK** after updating any of your organization's information as needed.

4. On the "Attestation and Agreement Upload" page, select **Print PDF Agreement**.

5. Review pages 1 and 12 of the agreement and confirm your organization's information. If any information is incorrect, return to the "Attestation and Agreement Upload" page and select **Cancel**. Repeat steps 2 through 5 to generate another agreement.

6. Obtain your Organization Senior Official's signature and date the signature page of the agreement.

You will upload the full agreement, including the COI Attestation form beginning on page 13, but you do NOT need to upload Appendix A. To upload your agreement:

1. On the **Attestation and Agreement Upload** page, select **Upload a File.**

2. In the pop-up window, navigate to the place you saved a PDF version of your updated, signed agreement on your computer and select the file to upload.

3. Select **Save & Return**. If you did not successfully upload your agreement, you will receive a warning message.

Figure 8: Attestation and Agreement Page Upload a File and Save and Return Buttons

4. On the "CDO Summary" page, select **Submit** either at the top or the bottom of the page.

5. On the "CDO Summary" page, if you have not done so already, add your CAC roster (refer to the CDO Roster Job Aid for instructions).

6. On the "CDO Summary" page, select **Submit** to submit your changes.

Confirm Your Submissions

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

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

Figure 9: Confirmation Page and Print PDF Button

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

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

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.