

# CDO RENEWAL PROCESS

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NC Community Health Center Association  
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# CDO Renewal Process

- Certified Application Counselor Designated Organizations (CDOs) that recertified or became a new CDO in 2018 are required to renew their CDO status in 2020.
  - CDO renewal occurs every two years
  - Maintaining CDO status allows CDO to continue training staff/volunteers as Certified Application Counselors (CACs)
- The Centers for Medicare & Medicaid Services (CMS) will email CDOs 30 days before their current CDO certification expires.
  - Email from CMS will include instructions on how to recertify
  - The three individuals who are listed as the CDO's main contacts will be notified
- CAC Roster is a new requirement for CDOs

# CAC ROSTER



# CAC Roster

- Roster allows CDOs to:
  - Document CAC names, email addresses, CAC IDs
  - Monitor CAC's annual certification training completion dates
- **CACs must be listed in Roster before they can take annual certification training**
- Be sure to use correct CAC ID format (e.g., **NCCDOA00000001**)
  - CDO assigns unique CAC IDs
  - No need to reassign existing CAC IDs, if they are in the correct format
  - How to assign unique CAC IDs  
<https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>

# Uploading CAC Roster

- Go to Organizational Web Maintenance Form, <https://mats.secure.force.com/CDOMaintenance/>
- After logging in, scroll down to “Certified Application Counselor (CAC)” section
- Click “Add CAC Roster”

Contact Information

**Organization Senior Official Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	William	Samah	william.samah@gmail.com

**CAC Project Director Contact Information**

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	John	Doe	jdoe@yopmail.com

**Secondary Contact Information**

[Add Secondary Contact](#)

**Certified Application Counselors (CACs)** ←

[Add CAC Roster](#) [Download My Current CAC Roster](#)

Action	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
There are no CAC Contacts for this organization.							

# CAC Roster


Two options for listing CACs in Roster

- **Manual**

- CDO can only add up to 5 CACs at one time using the Manual option

- **Roster Template**

- Allows CDO to add 1 or more CACs at a time

 Copying and pasting information into the Template might result in an error message

# CAC ROSTER: MANUAL OPTION



# CAC Roster: Manual Option

- If CAC information will be uploaded using the Manual option, select “No” when asked if you’ll be using CAC Roster Template.
- Enter CAC’s First Name, Last Name, Email Address, Current CAC ID, and Previous CAC ID (*if they have one*)
  - Previous CAC ID field is optional
  - Previous CAC ID cannot be edited once it has been saved



The screenshot shows the CMS logo at the top, followed by the text "CENTER FOR MEDICARE & MEDICAID SERVICES" and "CENTER FOR CONSUMER INFORMATION & INSURANCE OVERSIGHT". Below this is the heading "CAC Roster Upload Page". Underneath is a section titled "Instructions" with the following text: "Prior to adding your CAC Roster, collect the following information for each of your CACs: first name, last name, email address, current CAC ID, and previous CAC ID (if they have one). For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources>. Required fields are indicated with a red asterisk (\*). Select the link to download a CAC Roster template to create your .csv file. [CAC Roster Template](#) If you have five (5) or less CACs on your roster, you can populate your roster manually or select to use the CAC Roster template." Below the instructions is the question "Will you be using the CAC Roster template?" with two radio button options: "Yes" and "No". The "No" option is selected and circled in red.



# CAC Roster: Manual Option, continued

- If entering more than one CAC, click “Save and New” to enter information for the next CAC
- Once information for all CACs has been entered, click “Save and Return” button under “CAC Roster Summary” table.
- Return to the “CDO Summary” page and select “Submit.”

**CAC Roster Upload Page**

**Instructions**

Prior to adding your CAC Roster, collect the following information for each of your CACs: first name, last name, email address, current CAC ID, and previous CAC ID. For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>. Required fields are indicated with a red asterisk (\*). Select the link to download a CAC Roster template to create your .csv file. [CAC Roster Template](#)

If you have five (5) or less CACs on your roster, you can populate your roster manually or select to use the CAC Roster template. If you have more than five (5) CACs, you must use the CAC Roster template.

**CAC Roster Manual Upload**

**Instructions**

Please complete the fields below to populate your CAC Roster. Required fields are indicated with a red asterisk (\*).

**CAC #1**

* First Name:	Annie	* Last Name:	Demoone
* Email Address:	ademooone2@test.com		
* Current CAC ID:	VACDOA05000000	Previous CAC ID:	

Cancel Save **Save and New**

Select this button to save the changes and add another CAC.

# CAC Roster Summary Table

- “Training Completion Date” field will automatically populate by the Marketplace Learning Management System (MLMS) once a CAC has completed the annual certification training.
- “Decertification Date” field cannot be edited by CDO.

**CAC Roster Upload Page**

**Instructions**

Prior to adding your CAC Roster, collect the following information for each of your CACs: first name, last name, email address, current CAC ID, and previous CAC ID. For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>. Required fields are indicated with a red asterisk (\*). Select the link to download a CAC Roster template to create your .csv file. [CAC Roster Template](#)

If you have five (5) or less CACs on your roster, you can populate your roster manually or select to use the CAC Roster template. If you have more than five (5) CACs, you must use the CAC Roster template.

**CAC Roster Manual Upload**

**Instructions**

Please complete the fields below to populate your CAC Roster. Required fields are indicated with a red asterisk (\*).

**CAC Roster Summary Table**

Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
		Annie	Demoone	ademoone2@test.com	VACDOA0500000	

Cancel Save and Return

# CAC ROSTER: ROSTER TEMPLATE OPTION



# CAC Roster: Roster Template Option

- On CAC Roster Upload page, select “CAC Roster Template” link
- The link will open an excel file that can be used to upload list of CACs
  - The excel sheet has two tabs:
    - Instructions
    - CAC Roster
  - Select “Enable Editing” button (see next slide)
  - Then select “Enable Content” button

**CAC Roster Upload Page**

**Instructions**

Prior to adding your CAC Roster, collect the following information for each of your CACs: first name, last name, email address, current CAC ID, and pre

For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>.

Required fields are indicated with a red asterisk (\*).

Select the link to download a CAC Roster template to create your .csv file.

[CAC Roster Template](#)

If you have one (1) or less CACs on your roster, you can populate your roster manually or select to use the CAC Roster template. If you have more than

**CAC Roster Manual Upload**

**Instructions**

Please complete the fields below to populate your CAC Roster.

Required fields are indicated with a red asterisk (\*).

**CAC #1**

* First Name:	Annie	* Last Name:	Demoone
* Email Address:	ademoone2@test.com		
* Current CAC ID:	VACDOA0500000	Previous CAC ID:	

Cancel Save Save and New

Select this button to save the changes and add another CAC.

CAC\_Roster\_Template (15) [Protected View] - Excel

File Home Insert Page Layout Formulas Data Review View Developer Power Pivot Tell me what you want to do... Townsend, Kristy Share

**PROTECTED VIEW** Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. **Enable Editing**

A1

Column Heading	Content Description
First Name*	Enter the first name of the CAC. This is a required field.
Last Name*	Enter the last name of the CAC. This is a required field.
Email Address*	Enter the email address of the CAC. This is a required field.
Current CAC ID*	Enter the CAC's current ID (e.g., USCDOZ0012345), a maximum of 13 characters in length. This is a required field.
Previous CAC ID	Enter the CAC's previous ID (if applicable).

Instructions CAC Roster

100%

**PROTECTED VIEW** Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. **Enable Editing**

A1

A B C D E

### Certified Application Counselors (CAC) Roster Template

**Overview:** The purpose of the Certified Application Counselor (CAC) Roster Template is to provide certified application counselor designated organizations (CDOs) a streamlined way to import their certified application counselor (CAC) information.

#### Workbook Tab Overview:

**Instructions Tab** - Contains instructions and completion guidance.

**CAC Roster Tab** - Provides a template for CDOs to collect CAC information and generate a CSV file for upload to the CDO Organizational Maintenance web form. **You must select the Enable Editing button and then select the Enable Content button at the top of this template to proceed. Also, adding the users one by one yields the best results. If you are copying and pasting from another spreadsheet, please check every entry for extra spaces and remove them before creating the CSV file.**

Column Heading	Content Description
First Name*	Enter the first name of the CAC. This is a required field.
Last Name*	Enter the last name of the CAC. This is a required field.
Email Address*	Enter the email address of the CAC. This is a required field.
Current CAC ID*	Enter the CAC's current ID (e.g., USCDOZ0012345), a maximum of 13 characters in length. This is a required field.
Previous CAC ID	Enter the CAC's previous ID (if applicable).

CAC\_Roster\_Template (15) - Excel

File Home Insert Page Layout Formulas Data Review View Developer Power Pivot Tell me what you want to do... Townsend, Kristy Share

Clipboard Font Alignment Number Styles Cells Editing Webex

SECURITY WARNING Macros have been disabled. **Enable Content**

A1

Column Heading	Content Description
First Name*	Enter the first name of the CAC. This is a required field.
Last Name*	Enter the last name of the CAC. This is a required field.
Email Address*	Enter the email address of the CAC. This is a required field.
Current CAC ID*	Enter the CAC's current ID (e.g., USCDOZ0012345), a maximum of 13 characters in length. This is a required field.
Previous CAC ID	Enter the CAC's previous ID (if applicable).

Instructions CAC Roster

Ready 100%

### Certified Application Counselors (CAC) Roster Template

**Overview:** The purpose of the Certified Application Counselor (CAC) Roster Template is to provide certified application counselor designated organizations (CDOs) a streamlined way to import their certified application counselor (CAC) information.

#### Workbook Tab Overview:

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Column Heading	Content Description
First Name*	Enter the first name of the CAC. This is a required field.
Last Name*	Enter the last name of the CAC. This is a required field.
Email Address*	Enter the email address of the CAC. This is a required field.
Current CAC ID*	Enter the CAC's current ID (e.g., USCDOZ0012345), a maximum of 13 characters in length. This is a required field.
Previous CAC ID	Enter the CAC's previous ID (if applicable).

# CAC Roster: Roster Template Option, cont.

- Click on “CAC Roster” tab



## **CMS recommends entering CAC information one-by-one**

- If copying and pasting information into spreadsheet, be sure there are no extra spaces. Otherwise, an error message may appear.
- Enter CAC’s First Name, Last Name, Email Address, Current CAC ID, and Previous CAC ID (*if they have one*)
  - Previous CAC ID field is optional
  - Previous CAC ID cannot be edited once it has been saved
- Enter information for first CAC on row 11. (see next slide)



Excel window: CAC\_Roster\_Template (15) - Excel

File Home Insert Page Layout Formulas Data Review View Developer Power Pivot Tell me what you want to do... Townsend, Kristy Share

Clipboard: Paste Font: Calibri 11 Alignment: Number: \$ % % .00 .00 Styles: Conditional Formatting, Format as Table, Cell Styles Cells: Insert, Delete, Format Editing: Sort & Filter, Find & Select, Share This File, Webex

Formula bar: B11

Certified Application Counselors Roster					
Add Certified Application Counselor					
Create CAC Roster CSV File					
<b>Instructions</b>					
1. You must select the Enable Editing button and then select the Enable Content button at the top of this template to proceed.					
2. Be sure to have all of the necessary data for your CACs readily available to you to complete all of the information for the roster.					
3. Using the "Add Certified Application Counselor" button, add new lines to the roster beyond line 11 if adding more than one CAC. <b>Note:</b> Adding the users one by one yields the best results. If you are copying and pasting from another spreadsheet, please check every entry for extra spaces and remove them before creating the CSV file.					
4. Enter data for all required (*) fields.					
5. Select the "Create CAC Roster CSV File" button to generate the CSV file to be uploaded through the web form. <b>Note:</b> Once you save the file, this template will remain open; you will need to navigate back to the CDO Organizational Maintenance web form in your browser to proceed. You will upload the CSV file you saved as CacRosterUpload to the web form.					
10	First Name*	Last Name*	Email Address*	Current CAC ID*	Previous CAC ID
11	Delete				

Worksheet tabs: Instructions, CAC Roster





# CAC Roster: Roster Template Option, cont.

To add information for another CAC, select “Add Certified Application Counselor” button

The screenshot displays the Excel interface for the 'CAC\_Roster\_Template (15) - Excel'. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Power Pivot, and Tell me what you want to do... The user is Townsend, Kristy. The spreadsheet shows a 'Certified Application Counselors Roster' template. A red arrow points to the 'Add Certified Application Counselor' button in cell B4. Below it is the 'Create CAC Roster CSV File' button. To the right is an 'Instructions' box with five numbered steps and a note. At the bottom, there are columns for 'First Name\*', 'Last Name\*', 'Email Address\*', 'Current CAC ID\*', and 'Previous CAC ID'. The status bar at the bottom shows 'Instructions' and 'CAC Roster' tabs.

Certified Application Counselors Roster					
Add Certified Application Counselor					
Create CAC Roster CSV File					
<b>Instructions</b> 1. You must select the Enable Editing button and then select the Enable Content button at the top of this template to proceed. 2. Be sure to have all of the necessary data for your CACs readily available to you to complete all of the information for the roster. 3. Using the "Add Certified Application Counselor" button, add new lines to the roster beyond line 11 if adding more than one CAC. <b>Note:</b> Adding the users one by one yields the best results. If you are copying and pasting from another spreadsheet, please check every entry for extra spaces and remove them before creating the CSV file. 4. Enter data for all required (*) fields. 5. Select the "Create CAC Roster CSV File" button to generate the CSV file to be uploaded through the web form. <b>Note:</b> Once you save the file, this template will remain open; you will need to navigate back to the CDO Organizational Maintenance web form in your browser to proceed. You will upload the CSV file you saved as CacRosterUpload to the web form.					
	First Name*	Last Name*	Email Address*	Current CAC ID*	Previous CAC ID
Delete					

# CAC Roster: Roster Template Option, cont.

Once information for all CACs has been added, select “Create CAC Roster CSV File” button (remember where you save the file!)

The screenshot shows an Excel spreadsheet titled "CAC\_Roster\_Template (15) - Excel". The spreadsheet is titled "Certified Application Counselors Roster". It features a table with columns for "First Name\*", "Last Name\*", "Email Address\*", "Current CAC ID\*", and "Previous CAC ID". There are two buttons: "Add Certified Application Counselor" and "Create CAC Roster CSV File". A red arrow points to the "Create CAC Roster CSV File" button. The spreadsheet also includes an "Instructions" section with a list of steps and notes.

**Instructions**

1. You must select the Enable Editing button and then select the Enable Content button at the top of this template to proceed.
2. Be sure to have all of the necessary data for your CACs readily available to you to complete all of the information for the roster.
3. Using the "Add Certified Application Counselor" button, add new lines to the roster beyond line 11 if adding more than one CAC.  
**Note:** Adding the users one by one yields the best results. If you are copying and pasting from another spreadsheet, please check every entry for extra spaces and remove them before creating the CSV file.
4. Enter data for all required (\*) fields.
5. Select the "Create CAC Roster CSV File" button to generate the CSV file to be uploaded through the web form.  
**Note:** Once you save the file, this template will remain open; you will need to navigate back to the CDO Organizational Maintenance web form in your browser to proceed. You will upload the CSV file you saved as CacRosterUpload to the web form.

	First Name*	Last Name*	Email Address*	Current CAC ID*	Previous CAC ID
11	Delete				

# CAC Roster: Roster Template Option, cont.

Return to “CAC Roster Upload” page in your browser. Select “yes” for “Will you be using the CAC Roster Template?”

**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES  
CENTER FOR CONSUMER INFORMATION  
& INSURANCE OVERSIGHT

[Guidance](#) [CDO Renewal Job Aid](#) [CAC Roster Job Aid](#)

## CAC Roster Upload Page

**Instructions**

Prior to adding your CAC Roster, collect the following information for each of your CACs: first name, last name, email address, current CAC ID, and previous CAC ID (if applicable).

For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>.

Required fields are indicated with a red asterisk (\*).

Select the link to download a CAC Roster template to create your .csv file.

[CAC Roster Template](#)

If you have five (5) or less CACs on your roster, you can populate your roster manually or select to use the CAC Roster template. If you have more than five (5) CACs, you must use the CAC Roster template to populate your roster.

**Will you be using the CAC Roster template?**

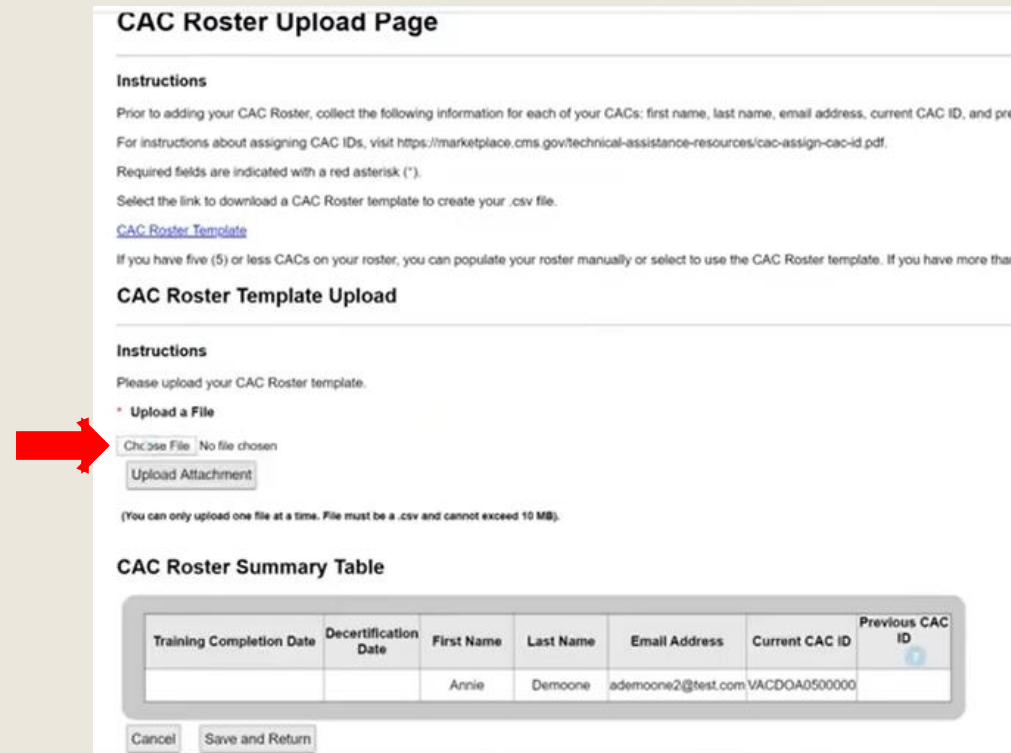
Yes  No

**CAC Roster Summary Table**

Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
		Annie	Demoone	ademooone2@tst.com	VACDOA0500000	

# CAC Roster: Roster Template Option, cont.

- “CAC Roster Template Upload” section will appear
- Select “Choose File” button
- Upload “CAC Roster” csv file
- Select “Save and Return” button
- Return to the “CDO Summary” page and select “Submit.”



**CAC Roster Upload Page**

**Instructions**  
Prior to adding your CAC Roster, collect the following information for each of your CACs: first name, last name, email address, current CAC ID, and previous CAC ID. For instructions about assigning CAC IDs, visit <https://marketplace.cms.gov/technical-assistance-resources/cac-assign-cac-id.pdf>. Required fields are indicated with a red asterisk (\*). Select the link to download a CAC Roster template to create your .csv file. [CAC Roster Template](#)

If you have five (5) or less CACs on your roster, you can populate your roster manually or select to use the CAC Roster template. If you have more than five (5) CACs, you must use the CAC Roster template.

**CAC Roster Template Upload**

**Instructions**  
Please upload your CAC Roster template.

\* **Upload a File**  
Choose File No file chosen  
Upload Attachment

(You can only upload one file at a time. File must be a .csv and cannot exceed 10 MB).

**CAC Roster Summary Table**

Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
		Annie	Demoone	ademoone2@test.com	VACDOA0500000	

Cancel Save and Return

# CAC Roster Summary Table

- “Training Completion Date” field will automatically populate by the MLMS once a CAC has completed the annual certification training.
- “Decertification Date” field cannot be edited by CDO.
- CDO can decertify a CAC on the CDO Summary Page (see next slide)
  - Decertify CAC if they leave the organization, **or**
  - Decertify CAC if they remain at organization but won’t be providing enrollment assistance during a plan year

The screenshot displays a web interface for uploading a file. At the top, there is a section titled "Upload a File" with a "Choose File" button (showing "No file chosen") and an "Upload Attachment" button. Below this, a note states: "(You can only upload one file at a time. File must be a .csv and cannot exceed 10 MB)." An "Attachment Summary" section follows, with the instruction "Select the Action link to view or delete the uploaded file." Below this is a table with three columns: "Action", "File Name", and "File Size". The table contains one row with a "View" link under "Action", "CacRosterUpload.csv" under "File Name", and "0.0002 MB" under "File Size".

Below the upload section is the "CAC Roster Summary Table", which is a data table with the following columns: "Training Completion Date", "Decertification Date", "First Name", "Last Name", "Email Address", "Current CAC ID", and "Previous CAC ID". The table contains six rows of data:

Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
		Maxwell	Demotwo	mdemotwo2@test.com	VACDOA0500003	
		Kathleen	Demothree	kdemothree2@test.com	VACDOA0500002	
		Hank	Demofour	hdemofour2@test.com	VACDOA0500004	
		Timothy	Demofive	tdemofive2@test.com	VACDOA0500005	
		Sally	Demosix	sdemosix2@test.com	VACDOA0500006	
		Annie	Demoone	ademooone2@test.com	VACDOA0500000	

At the bottom of the table, there are "Cancel" and "Save and Return" buttons.

### CAC Project Director Contact Information

Action	First Name	Last Name	Email Address
<a href="#">Edit</a> <a href="#">Replace</a>	John	Doe	jdoe@yopmail.com

### Secondary Contact Information

[Add Secondary Contact](#)

### Certified Application Counselors (CACs)

[Add CAC Roster](#)

[Download My Current CAC Roster](#)

Action	Training Completion Date	Decertification Date	First Name	Last Name	Email Address	Current CAC ID	Previous CAC ID
<a href="#">Edit</a> <a href="#">Decertify</a>			Maxwell	Demotwo	mdemotwo2@test.com	VACDOA0500003	
<a href="#">Edit</a> <a href="#">Decertify</a>			Kathleen	Demothree	kdemothree2@test.com	VACDOA0500002	
<a href="#">Edit</a> <a href="#">Decertify</a>			Hank	Demofour	hdemofour2@test.com	VACDOA0500004	
<a href="#">Edit</a> <a href="#">Decertify</a>			Timothy	Demofive	tdemofive2@test.com	VACDOA0500005	
<a href="#">Edit</a> <a href="#">Decertify</a>			Sally	Demosix	sdemosix2@test.com	VACDOA0500006	
<a href="#">Edit</a> <a href="#">Decertify</a>			Annie	Demofifteen	ademofifteen2@test.com	VACDOA0500000	

CONCLUSION





DON'T  
FORGET TO  
HIT "SUBMIT"



# Resources

- **Details about CDO Program, links to videos, training materials and FAQs**

<https://marketplace.cms.gov/certified-application-counselor-designated-organization-cdo-program-information>

- **CAC Roster**

- [Video \(5:48\)](#)
- [Step-by-step video \(31:50\)](#)
  - [Transcript](#)
- [Guide](#)


# Questions about CDO Renewal?

[CACquestions@cms.hhs.gov](mailto:CACquestions@cms.hhs.gov)



COALITION MEMBERS  
EXPERIENCE W/ CDO  
RENEWAL?





THANK YOU &  
GOOD LUCK!

