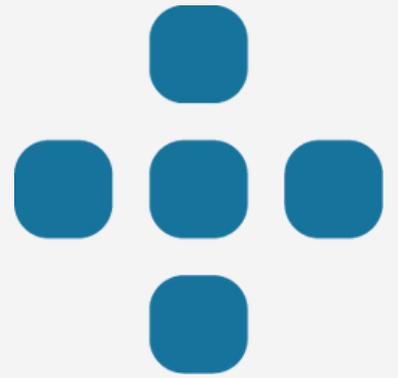


Maintaining your CAC Roster with CMS



IPHCA

"MAINTAINING YOUR CAC ROSTER WITH CMS"

Certified application counselor designated organizations (CDOs) are required to maintain their own list of certified application counselors (CACs) and unique CAC IDs. The Centers for Medicare & Medicaid Services (CMS) CDO Program Office has made this process easy for you!

Record and maintain your CAC information using the CAC Roster. This tool is designed with CDOs in mind to easily, add, update, and maintain their CAC information. The CAC Roster can be accessed using the [CDO Organizational Maintenance web form](#). To learn more about the CAC Roster tool by accessing the: [CAC Roster Overview Video](#).

Important: Maintaining a roster of your active CACs using the CDO Organization Maintenance web form will be necessary for your CACs to access required certification training on the Marketplace Learning Management System (MLMS).





STEP 1: PREPARE TO ADD YOUR CAC ROSTER

Before updating your CAC Roster, validate that your organization's information is up to date including organization's headquarters address and list of service location states and counties.

How to review and update your CDO organization's information:

1. Log into the <https://mats.secure.force.com/CDOMaintenance/>
2. Review your information on the **CDO Summary page**.
3. Select **Edit** to modify any of your information.
4. Select the **Submit** button on the **CDO Summary page**.

Note: If you update your CDO Organization Name, address, or service location states, the web form will prompt you to generate, sign, and upload a new CMS-CDO agreement.

Warning: The system will lock down while your newly signed CMS-CDO agreement is under review, so you will not be able to proceed with steps 2 or 3 until CMS approves your signed agreement.

Important: To access the current plan year assister certification training on the Marketplace Learning Management System (MLMS), CACs First Name AND Last Name listed on your CAC Roster must match the First Name AND Last Name on their Centers for Medicare & Medicaid Services (CMS) Enterprise Portal account. Before you add your roster, confirm the first and last names of all of your CACs as listed in their CMS Enterprise Portal accounts. To view their name as it appears on the CMS Enterprise Portal, a CAC should log in to the CMS Enterprise Portal at portal.cms.gov, select their name in the upper-right hand corner, select "My Profile" from the drop-down menu, and select "View Profile". Their name should appear along with other details related to their profile. Please note, once a user establishes a CMS Enterprise Portal account, they are not able to edit their name manually.

STEP 2: VALIDATE UNIQUE CAC IDS ARE ASSIGNED

Your CAC Project Director must assign unique CAC IDs to all your CACs. Before adding or updating your CAC Roster, ensure that all CACs have their ID and that they match the guidance found [in the instructions on how to assign CAC IDs](#) resource.



STEP 3: ADD YOUR CACS TO YOUR ROSTER

Using the [CDO Organizational Maintenance web form](#), create, update, or upload your CAC Roster.

1. Log in to the [CDO Organizational Maintenance web form](#).
2. On the CDO Summary Page, navigate to the Certified Application Counselors (CACs) section.
3. Select the Add CAC Roster button.
4. On the CAC Roster Upload Page, you will have the option to use and upload the CAC Roster template, or to add each of your CACs individually.
5. Follow the instructions on the page to populate your CAC Roster.
6. Review the CAC Roster Summary Table and select the Save and Return button.
7. On the CDO Summary page, select the Submit button.



Note: If you have more than five CACs, you must use and upload the CAC Roster template.

RESOURCES

For instructions about assigning CAC IDs and adding or updating your CAC Roster, access:

- [Instructions on how to assign CAC IDs](#)
- [CAC Roster Job Aid](#)
- [CAC Roster Demonstration Video](#)

For general guidance about the CDO Organizational Maintenance web form, access:

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

For additional information about the CDO Program, access:

- [CDO Program Information](#)
- [Technical Assistance Resources](#)
- [CDO Program FAQs](#)

Contact Information

For additional questions, contact us at CACQuestions@cms.hhs.gov. Please reference your CDO ID listed above in the subject line of your inquiry.