CDOS PROCESS UPDATE

# CDOS Maintenance Request — Client FAQ

*Common questions about the new compendium loader, Master CDOS files, and team access*

**STILL HAVE A QUESTION? —** Reach out to your hc1 Client Success representative or submit a request through the hc1 Support Portal — this list will keep growing as more questions come in.

## Why This Is Changing

### Q: Why is the submission process changing, especially soon after the last portal update?

**A:** This change addresses a different part of the process than the last portal update — how compendium files are loaded, not how requests are submitted through the portal. Under the previous method, we interpreted each request and manually applied what we believed the client wanted changed. We can't safely assume which fields should or shouldn't change based on a written summary alone, and in practice that assumption was wrong often enough that many requests had to be reworked multiple times. The new process removes that guesswork: the file you submit is exactly what gets loaded, so what you intend to show in your CDOS is what actually appears.

### Q: What's actually different for our team day to day?

**A:** The biggest shift: you now make the edit directly in the file yourself. The compendium has always been fully replaced on load — that part isn't new — but previously we interpreted your request and applied the change on our end. Now, you no longer need to highlight or flag which fields changed, since your edit goes in exactly as you made it. In exchange, the file's column order, column descriptions, and column count have to stay exactly as they are, and file naming matters more than before.

## Getting & Managing Your Master CDOS File

### Q: Does each site get its own Master CDOS file, or is one file shared across all sites?

**A:** Each site has its own Master CDOS file.

### Q: How and when do we get our file?

**A:** We're distributing the currently loaded CDOS to all sites ahead of go-live. We hold off on sending files out earlier than that because there's a chance of changes between now and then, and we want every site to start from the same current version rather than one that's already out of date.

### Q: How do we pull a new spreadsheet each time we want to submit?

**A:** You don't pull a fresh export each time. You keep working from the same Master CDOS file, updating it in place for every submission: start from the most recent version, make your edits, update the file name's date, and attach it to your request. Once a request is processed, that submitted version becomes your new "most recent" file for next time.

### Q: A link to our master file that a colleague received isn't working — what do we do?

**A:** Reach out to your Client Success representative for a current copy. Don't substitute an older file you may have saved locally, since it may not reflect the latest accepted changes.

### Q: We submitted a ticket before receiving our new Master CDOS file — what should we use?

**A:** Submit using the most recent file you already have on hand for your site. Once your updated master arrives, that becomes your go-forward version.

## Submitting a Request

**Q: What happens if our ticket comes back as "Returned to Client"?**

**A:** This almost always means one of two things: the master file wasn't attached, or the column structure was changed. Both are avoidable — see the Quick Reference Guide for the full submission checklist.

**Q: Can we request changes to more than one CDOS in a single ticket?**

**A:** Yes — the request form has a "Do you need to edit multiple CDOS?" option for this.

**Q: Does this change how we request updates to our General Information page (links, documents, site photo)?**

**A:** The submission channel is the same (Compendium Update in the CDOS Portal), but describe the request in plain language and attach any file being added — text instructions alone aren't sufficient if a file is part of the request.

**Q: Can we fix a mistake after submitting?**

**A:** Once submitted, the automated process overwrites the entire CDOS immediately — there's no undo. Review your file carefully before submitting; if you do catch an error afterward, submit a new corrected file as soon as possible.

**Q: Is there any review process after we submit, in case something's off?**

**A:** During the first month following go-live, hc1 will perform a QA review of submitted compendiums in addition to the automated date validation check. After that period, date validation remains the primary automated control, and clients are responsible for the accuracy and completeness of their submitted file.

## Team Access & Collaboration

**Q: How do we find out who on our team currently has access to submit CDOS requests?**

**A:** Reach out to your Client Success representative, who can confirm the current list of authorized users for your account.

**Q: How do we request access for a new team member?**

**A:** Let your Client Success representative know who needs access, and they'll get that set up.

**Q: What if the person who normally submits is out of office?**

**A:** Anyone on your team with CDOS access can submit on the team's behalf. This is a good reason to confirm your full access list ahead of time rather than during an urgent request.

**Q: More than one person on our team edits the file — how do we avoid overwriting each other's changes?**

**A:** See the separate Document Control Guide for several approaches — assigning one owner per submission cycle, always working from the last submitted file, an internal change-log tab, and a few others. Ask your Client Success representative for a copy if you don't already have it.

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*This FAQ will be updated as new questions come in from clients during the rollout. Contact your hc1 Client Success representative for anything not covered here.*