



**MEDICARE DRUG & HEALTH PLAN CONTRACT ADMINISTRATION GROUP**

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DATE: July 18, 2013

TO: Medicare-Medicaid Plans

FROM: Danielle R. Moon, J.D., M.P.A.  
Director

SUBJECT: Release of Marketing Model Materials and New Marketing Codes for Medicare-Medicaid Plans (MMPs) in California

The purpose of this memorandum is to announce the release of: (1) several model marketing documents, and (2) marketing codes in the Health Plan Management Systems (HPMS) specifically for Medicare-Medicaid Plans (MMPs) participating in California's Capitated Financial Alignment Demonstration.

**Model Marketing Materials**

As described in our July 27, 2012 HPMS memorandum, "Update on Marketing Timelines and model Materials for Financial Alignment Demonstration Contract Applicants," CMS has developed a number of MMP-specific integrated model beneficiary materials. These have been shared externally and finalized, and then further modified by the state with stakeholder input to customize them based on the requirements of the Capitated Financial Alignment demonstration in California.

Attached to this memo (and soon to be posted on the Financial Alignment Initiative web page at <http://cms.gov/Medicare-Medicaid-Coordination/Medicare-and-Medicaid-Coordination/Medicare-Medicaid-Coordination-Office/FinancialModelstoSupportStatesEffortsInCareCoordination.html>) are the following final Contract Year (CY) 2014 model documents for California MMPs:

- Summary of Benefits (SB)
- Integrated Formulary
- Combined Pharmacy/Provider Directory

We intend to release the following additional model marketing materials in the near future:

- Evidence of Coverage (EOC)/Member Handbook (with chapters to be released on a flow basis as they are finalized)
- ID card
- Welcome Letter for New Enrollees

- Integrated Appeals Notice (for non-Part D services)

Additional models, including the Annual Notice of Change for CY 2015, will be released on a flow basis later this year. CMS will also provide California MMPs with Spanish translations of the key marketing materials (the SB, ANOC/EOC (Member Handbook), integrated formulary, and provider/pharmacy directory).

### New Marketing Codes

CMS and the state have worked jointly on developing MMP-specific marketing codes for California MMPs. All the new codes are currently available in HPMS (Monitoring / Marketing Review / Marketing Code Lookup) under category 15000. MMPs must use these codes and will not be able to use the existing Medicare Advantage and Part D codes in the Marketing Module. Please note that the Marketing Code Lookup functionality provides information about how each material code will be reviewed (including file and use eligibility). MMPs in California may not use MMP marketing codes created for other states. Please note that the code descriptions for each code are appended with a “(CA)” designation to ensure MMPs can distinguish between MMP codes for different states. The chart below summarizes the current codes for California MMPs; we will add new codes to reflect new materials categories as needed.

#### Category 15000 – California Medicare-Medicaid Plans (MMPs)

New Code	Description
15101	Summary of Benefits (CA)
15102	MMP Welcome Letter for Passively Enrolled Individuals (CA)
15103	Formulary (CA)
15104	Provider/Pharmacy Directory (CA)
15105	Other pre-enrollment documents (CA)
15106	Errata Model - Annual Notice of Change (ANOC) / Evidence of Coverage (EOC) (CA)
15107	Combined Annual Notice of Change (ANOC) / Evidence of Coverage (EOC)/Member Handbook (CA)
15108	Standalone Evidence of Coverage (EOC) / Member Handbook (CA)
15109	Standalone Annual Notice of Change (ANOC) (CA)
15110	Explanation of Benefits (EOB) for non-Part D services (CA)
15111	Member Identification Card (CA)
15112	Non-Renewal Notice (CA)
15113	Part D Offer Beneficiary Services (CA)
15114	Part D Denial Notices (CA)
15115	Part D Non-Coverage Notices (CA)
15116	Part D Status Notices (CA)
15117	Part D Rights Notices (CA)
15118	Part D Notice of plan decisions (CA)
15119	Part D Appeals and Grievance Forms/Letters (CA)
15120	Part D Claims/Org. Determinations/Appeals/Grievances - CMS specified documents (CA)

15121	Integrated Denial Notice (CA)
15122	Non-Part D Claims/Org Determinations/Appeals/Grievances - CMS specified documents (CA)
15123	General Advertising - Presales Material (CA)
15124	Direct Mail Pieces (CA)
15125	Newspaper (CA)
15126	Radio (CA)
15127	TV (CA)
15128	Billboard/Banner (CA)
15129	Internet Web Pages (CA)
15130	Marketing Posters (CA)
15131	Newsletters (CA)
15132	Fliers (CA)
15133	Envelopes (CA)
15134	Physician Advertising Materials / Additional Promotions (CA)
15135	Multi-Language Insert (CA)
15136	Part D Explanation of Benefits (EOB) (CA)
15137	Excluded Provider Model Letter (CA)
15138	Prescription Transfer Letter (CA)
15139	Utilization Management Notifications (CA)
15140	Formulary Notices (CA)
15141	Formulary Change Notices (CA)
15142	Formulary/Drug - CMS specified documents
15143	Non-Renewal Script (CA)
15144	Sales Presentations (CA)
15145	Sales Scripts (CA)
15146	Surveys/Assessments (CA)
15147	Post Enrollment Member Outreach Scripts (CA)
15148	Scope of Appointment Confirmation Form (CA)
15149	Scope of Appointment Confirmation Script (CA)
15150	Enrollment Forms* (CA)
15151	Acknowledgement Notices* (CA)
15152	Reinstatement Notices* (CA)
15153	Disenrollment Notices* (CA)
15154	Enrollment Notices* (CA)
15155	Disenrollment Forms* (CA)
15156	Model Outbound Enrollment Verification Letters (CA)
15157	Outbound Enrollment Verification Script (CA)
15158	Other post-enrollment documents (CA)

\*Applicable only to California MMPs in the two County Health Organized Health Systems (COHS) counties.

Marketing policy guidance for California MMPs was provided in the “Final CY 2014 Marketing Guidance for California Medicare-Medicaid Plans” issued on July 10, 2013 and posted at

<http://www.cms.gov/Medicare-Medicaid-Coordination/Medicare-and-Medicaid-Coordination/Medicare-Medicaid-Coordination-Office/FinancialModelstoSupportStatesEffortsinCareCoordination.html>.

If you have any questions about the contents of this memorandum, please contact the Medicare-Medicaid Coordination Office at [mmcopsmodel@cms.hhs.gov](mailto:mmcopsmodel@cms.hhs.gov).