

DEPARTMENT OF HEALTH & HUMAN SERVICES  
Centers for Medicare & Medicaid Services  
Center for Beneficiary Choices  
7500 Security Boulevard, Mail Stop C1-05-17  
Baltimore, Maryland 21244-1850

**Health Plan Benefits Group**

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**DATE:** April 14, 2004

**TO:** Medicare Advantage Organizations

**FROM:** Division of Enrollment and Payment Operations

**SUBJECT:** Election of Software Vendors

To elect (contract with) a software vendor for submission of membership information to CMS on your behalf and/or elect a vendor to access your membership data from CMS you must:

- Provide CMS with a letter, on your letterhead, authorizing access to your proprietary information for the stated vendor. Your letter to CMS authorizes the vendor to upload and/or download membership and financial data for your health plan using CMS systems. You may include all pertinent information in the letter or send a transmittal letter on your letterhead and enclose the Plan Authorization Form. To get the Plan Authorization Form please go to [www.cms.hhs.gov/healthplans/systems/cmsaccess.asp](http://www.cms.hhs.gov/healthplans/systems/cmsaccess.asp).
- The health plan you are authorizing must be reported to CMS by their contract numbers, for example, H1298, and H9876, etc.

Here is a checklist to follow when authorizing a vendor to handle your proprietary membership based information.

1. Initially send a letter to CMS on your letterhead stating the vendor's name, address, telephone number, e-mail address, and principle contact.
2. Report the MA contract numbers for which you are authorizing the vendor access.
3. An updated letter authorizing the vendor is due annually from the date of the initial letter as long as the vendor contract is still in effect.
4. A notification to CMS is required immediately when vendor services are being terminated. Report to CMS by MA contract number with effective contract termination date.

Please follow the above instructions to ensure continuity of services. If you have any questions, please contact the DEPO central office staff assigned to the region where your MCO is located.

Sincerely,

Marla Kilbourne  
Director  
Division of Enrollment  
and Payment Operations