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TO: All Medicare Advantage, Medicare Advantage Prescription Drug Organizations, Demonstrations and Prescription Drug Plans

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SUBJECT: Marketing Reminders for the Annual Enrollment Season

This memorandum is to remind organizations about the quick review processes that are available to assist you during the enrollment season. It also outlines the process for submission of template materials, final populated template materials that qualify for the expedited review process, and discusses which template materials must be submitted using the standard template review process.

Marketing Reminder

We urge organizations to use model documents whenever possible for a 10-day marketing review period. Organizations can also use the File & Use process for all marketing materials that qualify. CMS' most recent enhancement to the marketing review process is the Expedited Marketing Review process. This allows organizations to significantly reduce the CMS review period. We recommend that all organizations, but especially large organizations, use the rapid review processes.

Expedited Marketing Review Process

Submission of Templates

Organizations must submit materials for the expedited review to their lead Regional Office (RO) reviewer via the appropriate Health Plan Management System (HPMS) marketing module. The lead region will review the template. If the lead region approves the template, the organization should not submit the approved template to the local RO since it will be available in HPMS. Please use the interim instructions in this memo until the Expedited Marketing Review process has been automated in the HPMS.

Individual Prescription Drug Plans, Multi-Contract Groups, and MA MRTs submitting template materials in the HPMS marketing module should mark the "Template Material" field as "Yes," and enter a Template ID in the provided field. Non-MRT MA organizations, including Regional PPO's, should only enter a Template ID in the provided field.

Final Submission for Populated Templates

After the templates are approved by the lead RO, organizations must enter the final populated templates into HPMS. This final submission does not require additional review and approval by CMS.

When submitting your final populated template materials, please use the following guidance.

1. Material Categories and Codes

CMS anticipates that new “Populated Template” material categories and codes will be added to the HPMS marketing modules for use with the final populated template materials as soon as possible.

When submitting a final populated template material, organizations must select the appropriate new populated template code, which will be different from the original template material code.

2. Material ID

Submission of the final “Populated Template” materials must include the marketing Material ID from the original template material submission, with “FINAL” attached to the end of the ID (e.g., XXXX_FINAL).

Please note that if you submit multiple final “Populated Template” materials that apply to one original template material, you will need to add unique identifiers to the material ID (e.g., XXXX_FINAL_1, XXX_FINAL_2, etc.).

3. Template ID

All organizations must use the same Template ID for the final "Populated Template" material submission that was used in the original submission.

Individual Prescription Drug Plans, Multi-Contract Groups, and MA MRTs submitting template materials in the HPMS marketing module, should mark the “Template Material” field as “**NO**” for the final populated template submissions.

Standard Marketing Review Process

Template Materials

Organizations that submit template materials that do not qualify for the Expedited Marketing Review process must continue to submit their final copies for local regional office approval. Materials updated with benefit information must be sent via HPMS to the local regional offices, for review and approval.

For additional information, please contact your regional office reviewer. Thank you.