



## **CENTER FOR MEDICARE**

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DATE: May 01, 2026

TO: All Part D Sponsors

FROM: Vanessa S. Duran, Director  
Medicare Drug Benefit and C & D Data Group

SUBJECT: Contract Year 2027 Part D Medication Therapy Management Program  
Guidance and Submission Instructions

This memorandum provides instructions to Part D sponsors regarding contract year (CY) 2027 Part D Medication Therapy Management (MTM) programs. All Part D sponsors are required to have an MTM program designed to ensure, with respect to targeted beneficiaries, that covered Part D drugs are appropriately used to optimize therapeutic outcomes through improved medication use, and to reduce the risk of adverse events, including adverse drug interactions. MTM program requirements are codified at 42 CFR § 423.153(d). Sponsors should refer to the HPMS memorandum “*Contract Year 2025 Part D Medication Therapy Management Program Guidance and Submission Instructions*” dated May 6, 2024, which can be found on the CMS Part D MTM webpage at <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/PrescriptionDrugCovContra/MTM>, in addition to the information provided in this memorandum.

### **Important Dates and Information for 2027 MTM Program Submissions and Attestations**

Annually, sponsors submit an MTM program description to CMS through the Health Plan Management System (HPMS) for review and approval. CMS evaluates each program description to verify that it meets the current minimum requirements for the program year. The requirements do apply to Employer Group Waiver Plans (EGWPs). These requirements do not apply to MA Private Fee for Service (MA-PFFS) organizations (see 42 CFR § 423.153(e)) or PACE organizations. However, considering that MA-PFFS organizations have an equal responsibility to provide a quality Part D product, CMS encourages MA-PFFS organizations to establish an MTM program to improve quality for Medicare beneficiaries. MA-PFFS organizations that choose to establish an MTM program must follow the same annual submission and approval process.

The CY 2027 MTM program submission deadline is **June 3, 2026**, for all new and renewing Part D sponsors.

Action	Key Date
Release of the CY 2027 MTM Program Submission Module in HPMS	May 20, 2026 9:00 am EST
2027 MTM Program Submission Deadline	June 3, 2026 11:59 pm PDT
2027 MTM Program Attestation Deadline	June 17, 2026 11:59 pm PDT

A technical document titled “HPMS CY 2027 MTM Program User Manual” will be available in early May, 2026 for download through the CY 2027 MTM Program Submission module under Documentation in HPMS.

### **Annual Eligibility Threshold**

Beginning January 1, 2025, per 42 CFR § 423.153(d)(2)(i)(C), the MTM cost threshold is set at the average annual cost of eight generic drugs, as defined at 42 CFR § 423.4, and determined using the prescription drug event (PDE) data specified at 42 CFR § 423.104(d)(2)(iv)(C). Based on analysis of 2025 PDE data, the MTM cost threshold will be \$1,340 for 2027.

### **Standardized Format**

The current Standardized Format and updated technical instructions are posted on the [CMS Part D MTM webpage](#). The Standardized Format (CMS-10396; OMB control number: 0938-1154) for the comprehensive medication review (CMR) summary was approved by the Office of Management and Budget (OMB) through the Paperwork Reduction Act (PRA) process through December 31, 2027.

### **Information about Safe Disposal of Controlled Substances**

Pursuant to 42 CFR § 423.153(d)(1)(vii)(E), since January 1, 2022, Part D sponsors have been required to provide to all MTM enrollees, at least annually, as part of the comprehensive medication review (CMR), a targeted medication review (TMR), or other MTM correspondence or service, information about safe disposal of prescription drugs that are controlled substances, drug take back programs, in-home disposal, and cost-effective means to safely dispose of such drugs.

Under 42 CFR § 423.153(d)(1)(vii)(F), these enrollees must be provided all information required at 42 CFR § 422.111(j), which includes the location of two or more drug take back sites that are available in the community where the enrollee resides. Specifically, the identified drug take back sites must be among the drug take back sites that are generally utilized by people residing in the same community as the MTM enrollee. That is, drug take back sites that are physically located within the shortest travel times. While the requirement under the regulation that Part D sponsors identify two drug take back sites ensures that multiple choices are available to the enrollee, we encourage plans to identify additional community take back sites.

Part D sponsors may use the DEA search engine at <https://www.dea.gov/everyday-takeback-day>

and/or other resources to identify the two or more locations for the MTM enrollee. The information should be accurate at the time the notice is developed, and plans have the flexibility to tailor their language to aid in the beneficiary's understanding.

Sponsors may provide the safe disposal information in the CMR, TMR, MTM program Welcome Letter, or other MTM correspondence or service. Although website postings alone will not fulfill the requirement that the information be provided to individual MTM enrollees, Part D sponsors may deliver this information electronically.

## **Website**

As a reminder, pursuant to 42 CFR § 423.2265(b)(13), Part D sponsors are required to include on their websites a separate section or page about the sponsor's MTM program that provides the following:

- An explanation of the MTM program, including eligibility requirements and the purpose and benefits of MTM,
- Information about how to obtain MTM service documents, including the medication list,
- That the service is free,
- A summary of services,
- Information about how the beneficiary will know they are eligible and enrolled into the MTM program, and
- Information about the CMR and TMRs, including how the reviews are conducted and delivered, time commitments, and materials beneficiaries will receive.

In addition to this required information, Part D sponsors should consider providing MTM enrollees with the following:

- Information on who to contact at the plan for more information, with customer service personnel prepared to answer questions about the MTM program, and
- A statement clarifying that MTM services are not considered a benefit.

If possible, this section or page on the website should be accessible by clicking through a maximum of two links. Increasing font sizes and using lay language will help beneficiaries to read and understand the content of the MTM webpage. Sponsors should ensure that the MTM program web page URL reported with their program submission in HPMS is functioning and reflects accurate and up-to-date information. For example, the MTM program information should reflect the sponsor's eligibility requirements for the contract year for both groups of targeted beneficiaries, including beneficiaries who meet the criteria in 42 CFR § 423.153(d)(2) and ARBs as defined at 42 CFR § 423.100, and should also reflect the current cost threshold amount.

The Update Cycle window from December 1 to December 10 provides plan sponsors with an opportunity to make sure their website URLs are functioning before the start of the contract year. For more information on how to update information in the MTM program submission, refer to the section below titled "Change Request Submission Process."

## Change Request Submission Process

The HPMS MTM Program Submission module also allows sponsors to submit MTM program change requests during five Update Cycle windows. Please refer to the User Manual available in HPMS. Sponsors may request changes to their CMS-approved program during any the following Update Cycle windows as noted in the “CY 2026-27 Medicare Parts C and D Annual Calendar”:

- September 1 - September 10, prior to the contract year (i.e., before effective date of the approved MTM program),
- December 1 – December 10, prior to the contract year (i.e., before effective date of the approved MTM program). *This is the last window to make sure your website URL is functioning and meets the website content requirements per 42 CFR § 423.2265(b)(13) for the upcoming contract year.*
- March 1 - March 10, within the contract year (i.e., after implementation date of approved MTM program),
- June 1 - June 10, within the contract year, and,
- September 1 - September 10, within the contract year.

The MTM Program Module submission gates are automatically open during these Update Cycle windows. Sponsors should (1) directly edit the program description in the applicable data entry page(s) and (2) enter information in the Change Request Form Description field(s) to justify the changes to the applicable data entry page(s). In addition, sponsors should submit their re-attestation via the HPMS attestation link as described above.

Part D sponsors will receive an email correspondence regarding the approval of the change. Depending upon the volume of requests, plans should expect a response within 30 days. The changes should be implemented within a reasonable time following approval. Sponsors may not adjust their bids based on requested changes to their CMS-approved MTM program.

We encourage sponsors to submit changes during the Update Cycle windows. If your contract needs to make changes to your MTM program outside of these windows or for other questions related to Part D MTM programs, please email [partd\\_mtm@cms.hhs.gov](mailto:partd_mtm@cms.hhs.gov). It is essential to include the contract ID(s) in the email request and the applicable contract year if you are requesting to have the submission gate opened in HPMS. If you have any questions on accessing the HPMS MTM Program Submission module, please contact the HPMS Help Desk at 1-800-220-2028.