



**CENTERS FOR MEDICARE & MEDICAID SERVICES**

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**TO:** All Current and Prospective Medicare Advantage, Prescription Drug Plan, 1876 Cost, and PACE Organizations and Marketing Consultants

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**SUBJECT:** New Third-Party Marketing Organization Firm Name in the Health Plan Management System

Since 2021, third-party marketing organization (TPMO) users have submitted third-party marketing materials in the Health Plan Management System (HPMS) Marketing module using the “Multi-Plan Material” functionality. Other than CMS users, only the TPMO user who performed the original submission can access a third-party material in HPMS. This constraint can cause access issues, such as when the TPMO user who owns a particular material is out of the office temporarily or leaves their organization. In response, the TPMO may need to request technical assistance from CMS to access those materials, or in some situations, re-submit as a new material.

On May 29, 2026, CMS will introduce a new TPMO Firm Name field in HPMS to address these issues. This new identifier will provide marketing consultants working for the same TPMO with shared access to their organization’s marketing material submissions.

### How will this work in the Marketing module?

To be eligible to share materials with another marketing consultant assigned to the same TPMO firm name, the user must be:

1. Assigned to the Marketing Consultant user profile.
2. Assigned one or more of the following user access types:
  - a. Marketing Material Data Entry - 3rd Party
  - b. Marketing View Material - 3rd Party
  - c. Marketing Reports - 3rd Party

To share access to a material affiliated with a multi-contract entity (MCE), both TPMO users must be assigned:

- One or multiple contract numbers in the MCE, and
- The same TPMO firm name.

To share access to a material that is **not** affiliated with an MCE, both TPMO users must be assigned:

- The contract number associated with the material, and
- The same TPMO firm name.

Note that a third-party marketing consultant user may only be associated with one TPMO firm name at a time.

By default, TPMO users will **not** have a TPMO firm name assigned in HPMS. This status (i.e., no firm name assigned in HPMS) ensures that marketing materials will not be shared between TPMO users associated with the same firm unless an action is taken.

How can we manage the assignment of TPMO firm names to third-party marketing consultant users?

To ensure users are connected to firm names appropriately, a senior official at the TPMO must submit requests to add, edit, or remove TPMO firm name assignments for third-party marketing consultant users.

The TPMO must prepare an official letter that includes the user's name, user ID, and email address, the TPMO firm name, and the reason for change. The letter must be provided on the TPMO's official letterhead and signed by a senior official of the organization. The TPMO may submit one letter requesting firm name assignments for multiple consultants.

The TPMO must submit the official letter via e-mail in scanned PDF format to the [HPMS Consultant Access mailbox](#). To facilitate timely processing, please indicate **TPMO Firm Assignment** in the subject line of the e-mail.

## Questions

Marketing policy questions should be directed to the [CMS Marketing team](#). Requests for technical assistance with HPMS should be directed to the HPMS Help Desk at either [hpms@cms.hhs.gov](mailto:hpms@cms.hhs.gov) or 1-800-220-2028.