

DEPARTMENT OF HEALTH & HUMAN SERVICES  
Centers for Medicare & Medicaid Services  
Center for Beneficiary Choices  
7500 Security Boulevard, Mail Stop C4-23-07  
Baltimore, Maryland 21244-1850



## PLAN OVERSIGHT & ACCOUNTABILITY GROUP

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**DATE:** May 26, 2006

**TO:** All Medicare Advantage, Prescription Drug Plan, Demonstration, and  
1876 Cost Organizations

**FROM:** Cynthia E. Moreno  
Director

**SUBJECT:** HPMS Marketing Module Release 4.0 Changes

We have released version 4.0 of the MA and PDP Marketing modules today on HPMS production. The changes implemented in this version are based upon the comments received from the Marketing Lessons Learned 2006 process, MA and PDP organizations, Regional Offices, and a subsequent series of JAD sessions with Central Office staff. This document provides an overview of the changes that have been made.

### **1. Data Entry Pages:**

Cobrand and Joint Enterprise links have been provided on the data entry pages for Regional Offices and MA and PDP organizations (New Material, New MRT/MCG, Revision, and Resubmission) as a reference tool for applicable contracts.

For clarification purposes, the "Model Language Used" option on all pages has been renamed "Model Language Used *Without Modification*".

The material description entry has been locked down and will appear as a read-only data field for the Regional Office staff. This will prevent occurrences of the MA and PDP organization's description being overwritten by comments from Regional Office staff.

Supporting documents or translations of materials may now be attached to the original material by uploading all documents in a .pdf or a .zip file. This relaxes the upload file restrictions without removing the necessary edits to ensure that only one upload takes place per material. *Please note that a .zip file must be saved before the multiple files can be viewed. The files will not appear in the pop-up window. To be able to view multiple files without saving them, use a .pdf file.*

## **2. Locate/View Material Page:**

The CMS comments information is now part of the data available on the “Locate/View Material” data page.

A “Transaction History” link has been added to the “Locate/View Material” data page, which enables the user to view the entire chronology of a material since its initial submission.

A link to the uploaded document(s) has been added to the “Locate/View Material” data page for easier access when viewing the current status of a material.

## **3. E-Mail Functionality:**

The e-mail function has been updated to display all pre-filled contact lists in alphabetical order.

The e-mail function has been updated to automatically select the material reviewer as a recipient of any system generated e-mails.

## **4. Reports:**

The material status date (date approved, date disapproved, date accepted, etc.) is now available on the “Material Listing Report”.

The “Material Listing Report” now displays the statuses of “Pending Accepted” or “Pending Conditional Accepted” during the 5 day waiting period.

The “Material Listing Report” now has a default sort order of received date (submitted date) in descending order, so that the most recent submissions will appear first.

The alternate line shading on the “Material Listing” and “Marketing Materials Pending” reports was increased to improve readability.

## **5. New Functions:**

New functionality to designate materials as “No Longer in Use” has been provided to MA and PDP organization or Regional Office users.

For the MA and PDP organizations, it takes the form of an additional link in the left-hand navigation bar entitled “Mark Material as No Longer in Use”. This link will take the user to a selection criteria screen and a search results screen. Only materials with a status of “Approved” or “Accepted” may be marked no longer in use. MA and PDP organizations will be able to update the following fields: the option marking the material as no longer in use, the end of use date, and notes pertaining to this action. If a material is flagged as “No Longer in Use,” the user must enter the “End of Use Date”. The notes section is

provided for any additional information the user may choose to provide. It is an optional data field. These are the *only* fields that may be updated by MA and PDP organizations for a previously submitted material.

## **6. User Guides:**

All user guides have been updated to reflect changes and enhancements to the modules.