



**MEDICARE DRUG & HEALTH PLAN CONTRACT ADMINISTRATION GROUP**

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DATE: April 24, 2013

TO: Medicare-Medicaid Plans

FROM: Danielle R. Moon, J.D., M.P.A.  
Director

SUBJECT: Release of Marketing Model Materials and New Marketing Codes for Medicare-Medicaid Plans (MMPs) in Massachusetts

The purpose of this memorandum is to announce the release of: (1) several model marketing documents, and (2) marketing codes in the Health Plan Management Systems (HPMS) specifically for Medicare-Medicaid Plans (MMPs) participating in Massachusetts' Capitated Financial Alignment Demonstration.

**Model Marketing Materials**

As described in our July 27, 2012 HPMS memorandum, "Update on Marketing Timelines and model Materials for Financial Alignment Demonstration Contract Applicants," CMS has developed a number of MMP-specific integrated model beneficiary materials. These have been shared externally and finalized, and then further modified by the state with stakeholder input to customize them based on the requirements of the Capitated Financial Alignment demonstration in Massachusetts.

Attached to this memo (and soon to be posted on the Financial Alignment Initiative web page at: <http://cms.gov/Medicare-Medicaid-Coordination/Medicare-and-Medicaid-Coordination/Medicare-Medicaid-Coordination-Office/FinancialModelstoSupportStatesEffortsInCareCoordination.html>) are the following final Contract Year (CY) 2013 model documents for Massachusetts MMPs:

- Summary of Benefits (SB)
- Integrated Formulary
- Combined Pharmacy/Provider Directory

We intend to release the following additional model marketing materials in the near future:

- Evidence of Coverage (EOC)/Member Handbook (with chapters to be released on a flow basis as they are finalized)
- ID card
- Welcome Letter for New Enrollees
- Integrated Appeals Notice (for non-Part D services)

Additional models, including the Annual Notice of Change for CY 2014, and updated models for CY 2014 (if needed) will be released on a flow basis later this year.

## New Marketing Codes

CMS and the state have worked jointly on developing MMP-specific marketing codes for Massachusetts MMPs. All the new codes are currently available in HPMS (Monitoring / Marketing Review / Marketing Code Lookup) under category 15,000. MMPs must use these codes and may not use the existing Medicare Advantage and Part D codes in the Marketing Module. Please note that the Marketing Code Lookup functionality provides information about how each material code will be reviewed (including file and use eligibility). The chart below summarizes the current codes; we will add new codes to reflect new materials as needed.

### Category 15,000 – Medicare-Medicaid Plans (MMPs)

New Code	Description
15001	Summary of Benefits (MA)
15002	MMP Welcome Letter for Passively Enrolled Individuals (MA)
15003	Formulary (MA)
15004	Provider/Pharmacy Directory (MA)
15005	Other pre-enrollment documents (MA)
15006	Errata Model - Annual Notice of Change (ANOC) / Evidence of Coverage (EOC) (MA)
15007	Combined Annual Notice of Change (ANOC) / Evidence of Coverage (EOC)/Member Handbook (MA)
15008	Standalone Evidence of Coverage (EOC) / Member Handbook (MA)
15009	Standalone Annual Notice of Change (ANOC) (MA)
15010	Explanation of Benefits (EOB) for non-Part D services (MA)
15011	Member Identification Card (MA)
15012	Non-Renewal Notice (MA)
15013	Part D Offer Beneficiary Services (MA)
15014	Part D Denial Notices (MA)
15015	Part D Non-Coverage Notices (MA)
15016	Part D Status Notices (MA)
15017	Part D Rights Notices (MA)
15018	Part D Notice of plan decisions (MA)
15019	Part D Appeals and Grievance Forms/Letters (MA)
15020	Part D Claims/Org. Determinations/Appeals/Grievances - CMS specified documents (MA)
15021	Integrated Denial Notice (MA)
15022	Non-Part D Claims/Org Determinations/Appeals/Grievances - CMS specified documents (MA)
15023	General Advertising - Presales Material (MA)
15024	Direct Mail Pieces (MA)
15025	Newspaper (MA)
15026	Radio (MA)

15027	TV (MA)
15028	Billboard/Banner (MA)
15029	Internet Web Pages (MA)
15030	Marketing Posters (MA)
15031	Newsletters (MA)
15032	Fliers (MA)
15033	Envelopes (MA)
15034	Physician Advertising Materials / Additional Promotions (MA)
15035	Multi-Language Insert (MA)
15036	Part D Explanation of Benefits (EOB) (MA)
15037	Excluded Provider Model Letter (MA)
15038	Prescription Transfer Letter (MA)
15039	Utilization Management Notifications (MA)
15040	Formulary Notices (MA)
15041	Formulary Change Notices (MA)
15042	Formulary/Drug - CMS specified documents
15043	Non-Renewal Script (MA)
15044	Sales Presentations (MA)
15045	Sales Scripts (MA)
15046	Surveys/Assessments (MA)
15047	Post Enrollment Member Outreach Scripts (MA)
15048	Scope of Sales Appointment Confirmation Form (MA)
15049	Scope of Sales Appointment Confirmation Script (MA)

We anticipate releasing final marketing policy guidance to Massachusetts MMPs in the near future. We received a number of comments on our March 29, 2013 draft marketing guidance for Massachusetts MMPs and are working with the State to make final modifications based on those comments.

If you have any questions about the contents of this memorandum, please contact the Medicare-Medicaid Coordination Office at [mmcocapsmodel@cms.hhs.gov](mailto:mmcocapsmodel@cms.hhs.gov).