



Accountable Care Organization Marketing ACO User Guide

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1 Overview

The Health Plan Management System (HPMS) Accountable Care Organization Marketing Module is an automated tool that is used for entering, tracking, and maintaining Marketing Material that ACO Organizations submit to Centers for Medicare & Medicaid Services. CMS developed the ACO Marketing Module in response to its need to effectively manage and measure the critical components supporting this program.

With the broad scope of activities relating to reviewing marketing performance as part of its oversight activities, CMS requires the use of an automated tool to streamline the process. The HPMS ACO Marketing Module seeks to accomplish several goals:

- Standardize the marketing review data systems used by CMS.
- Standardize the protocol and procedures for receiving ACO marketing materials.
- Collect the same information on all submitted materials.
- Provide reports and statistics regarding the collected information.

While the basic functions of the module are simple to understand and navigate, this User Guide provides a walk-through of the major functions and pages.

2 Getting Started

Before getting started with the ACO Marketing Module, there are some basic ground rules for accessing the HPMS. If you have questions or require assistance, please contact the HPMS Help Desk at either 1-800-220-2028 or hpms@cms.hhs.gov.

2.1 User Access

To access the HPMS, ACO users must have:

1. A CMS HITS User ID
2. Access to the Internet

2.1.1 Obtaining a CMS HITS User ID

The [CMS User Access form](https://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/InformationSecurity/downloads/EUAccessform.pdf) is available on the cms.gov website (<https://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/InformationSecurity/downloads/EUAccessform.pdf>).

You must sign and date the second page and return it along with the form.

Note: Your request cannot be processed without a signature and date.

2.1.2 Site Access

Accessing the HPMS via the Web:

1. Select the following Link: [Health Plan Management System Login Page \(https://hpms.cms.gov/\)](https://hpms.cms.gov/)
2. Enter the user ID and password
3. Select Login

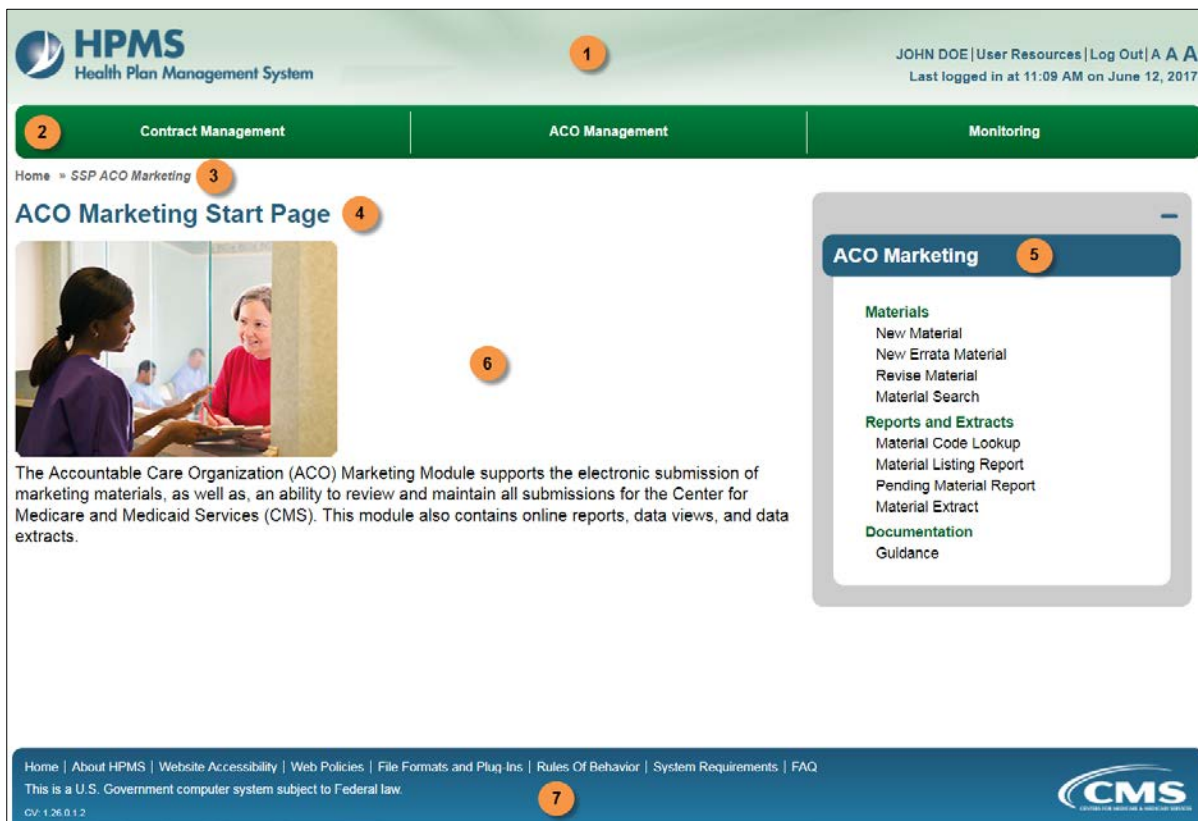
2.2 System Navigation

The ACO Marketing Module is accessible by selecting **ACO Management > ACO Marketing** on the Main Navigation bar. **Figure 1** shows the module page layout with section labels. A complete section listing is provided below:

1. **Header** – Displays the account name, the Log Out link, and text sizing customization.
2. **Main Navigation Bar** – Allows navigation between ACO Marketing and other modules.
3. **Breadcrumbs** – Breadcrumbs show your current location on the site (up to 4 levels).
4. **Page Title** – The title of the page.
5. **Secondary Navigation** – Expand/Collapse navigation pane allows navigation within the ACO Marketing Module.
6. **Body** – This is the main body of the page.

- Footer** – Displays links to general HPMS information.

Figure 1: ACO Marketing Start Page



2.3 Understanding the Material Status

The Material Status indicates the current disposition of a material, and where the material currently resides in workflow. When viewing a material submission in the Revise Material, Material Search, or Reports and Extracts functions, a user will find the status of a material. A complete status listing is provided below:

- Pending** – Material is pending CMS review.
- Withdrawn by ACO** – ACO requested its material be withdrawn.
- Disapproved** – Material was disapproved by the CMS Reviewer, and can be revised.
- Approved** – Material was approved by the CMS Reviewer.
- Template Approved**¹ – Material was submitted as “Template Used without Modification” and was automatically approved upon submission.

¹ Status does not apply to Errata Materials

6. **Deemed Approved**² – A disposition was not applied by the CMS Reviewer within the allotted review period³ and was automatically “deemed” approved.

² Status does not apply to Errata Materials.

³ The allotted review period is determined by the material code. For more information, see the [Material Code Lookup section](#).

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3 New Material

The purpose of the **New Material (Figure 2)** function is to submit new materials for review.

ACOs may submit a new marketing material for either an individual ACO, or for a group of ACOs.

Notes for group submissions:

1. The material must share the same material code and attributes across all selected ACOs.
2. The system will automatically create an individual material for each selected ACO upon material disposition.
3. The main material submitted for the group of ACOs may be referred to as a Primary material and the material that is replicated for each ACO may be referred to as a Secondary material. This scenario can result in the following based upon the type of material submitted:
 - a. If the material submitted for the group of ACOs is a non-template material, then the Primary will get pending status upon submission and will go through the allotted review period.
 - i. Upon Approval, the Secondary materials will be created with statuses of Approved
 - ii. Upon Disapproval, the Primary material must go through a revision process. No Secondary materials will be created.
 - b. If the material submitted for the group of ACOs is a template material, then both the Primary and Secondary material shall get a disposition of Template Approved immediately upon submission. (The Secondary materials are immediately created.)

Figure 2: New Material Page

Home » SSP ACO Marketing » New Material Add to My Favorites

New Material ACO Marketing +

A field with an asterisk (*) before it is a required field.

*Performance Year:

*Reviewer:

Unselected ACO ID / Name:

A0000 - Sample ACO Organization 0

A0001 - Sample ACO Organization 1

***Selected ACO ID / Name:**

*Material ID:

*Category:

*Material Code:

Attributes

Note: If the material is an Alternate Format, the checkbox will need to be selected and the corresponding ID has to be filled.

Alternate Format

Original Material ID:

*Template Used without Modification:

*Material Description:

*Total Pages:

Comments:

Material Status:

Note(s):

- Filename cannot contain any of the following characters: # % + ; & ..
- Accepted File Types: .pdf, .doc, .txt, .jpg, .gif, .ppt, .zip, .xlsx, .docx, .pptx.
- .zip files cannot contain invalid file types.

*Material:

How to create a new material:

1. Select **New Material** from the secondary navigation.
2. Fill out the New Material form. Required fields are preceded by an asterisk (*). A complete field listing is provided below:

- a. ***Performance Year** – The year the material will be used.
 - i. *Note: The Performance Year is NOT the same as the ACO Agreement Year. The Performance Year is the Calendar Year in which the material is to initially be used.*
- b. ***Reviewer** – You may select any available reviewer name.
- c. **Unselected ACO ID(s) / Name(s)** – ACO ID(s) that are assigned to the user currently logged in.
- d. ***Selected ACO ID(s) / Name(s)** – ACO ID(s) to which the new material applies.
- e. ***Material ID** – The user-created unique identifier for the material.
- f. ***Category** – The category of the material.
- g. ***Material Code** – The material code assigned to the material.

Note: Materials can only be submitted with Material Codes that do not allow Errata. The allotted review period is determined by the material code.

For more information, see the [Material Code Lookup section](#).

- h. **Alternate Format** – Indicate if the material contains an alternate format also known as a Translated Material.
 - i. **Original Material ID** – The material ID of the original, non-translated material for which an “Alternate Format” material is being submitted.

Note: If the “Alternate Format” box is selected, this is a required field.
 - j. ***Template Used without Modification** – If the selected Material Code has a template available, indicate whether a template was used without modification.
 - k. ***Material Description** – Brief description of the material.
 - l. ***Total Pages** – The total number of pages of the material.
 - m. **Comments** – Applicable comments.
 - n. **Material Status** – Indication of what the Material status will be upon submission. For a list of all statuses, see the [Understanding the Material Status section](#).
 - o. ***Material** – Select **Browse** to upload a file from your PC, Choose the file, and select **Open**.
3. After completing all information, select **Next**.
 4. Review the information provided on the **New Material Verification** page (**Figure 3**).
 - a. If further changes need to be made, select **Back**.
 - b. If the information is correct, select the attestation checkbox and select **Submit** to save the updates.

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5. Upon submission, the Confirmation page is displayed (**Figure 23**). For more information on Email Notifications, please see the [Confirmations and Email Notifications section](#).
6. Select **Ok** to return to the New Material page.

Figure 3: New Material Verification Page

Home » SSP ACO Marketing » New Material » Verification

Verification

ACO Marketing
+

A field with an asterisk (*) before it is a required field.

If all information below is correct, select the "Submit" button. Otherwise, select the "Back" button to return to the previous page.

Performance Year: 2017

Reviewer: Enghauser, Matt

ACO ID / Name: A0000 - Sample ACO Organization 0

Material ID: Material 2

Category: 01000 - Advertising

Material Code: 01001 - Newspaper

Template Used without Modification: No

Alternate Format: No

Alternate Format Original Material ID:

Material Description:

Material Status: Pending

Material: [Test DOCX File \[DOCX, 13KB\]](#)

Total Pages: 22

Comments:

*1, **John Doe** attest to the completeness and accuracy of the following marketing material: **Material 2**.
Based on my best knowledge, information, and belief, all information submitted to CMS in these documents are accurate, complete, and truthful. Note: this attestation applies to all material types and attributes, including errata material submission, as applicable.

4 New Errata Material

The purpose of the **New Errata Material (Figure 6)** function is to submit minor changes/modifications to existing approved materials for review.

The process for submitting a new errata material involves the following steps:

1. Search for the original materials against which an errata needs to be submitted. Select the original material/materials (up to 5 materials) to submit the errata against.
2. Select the errata material code from the dropdown and enter the required information.
3. Upload the errata material as well as the errata detail template, which is available via the “Errata Detail Template” link. These two files can be uploaded as one zip file.

Figure 4: New Errata Original Material Search Page

Home » SSP ACO Marketing » New Errata Material

New Errata Original Material Search

ACO Marketing +

A field with an asterisk (*) before it is a required field.

Note: Select criteria to search for the original material for which you are submitting an Errata.

[Errata Detail Template \[DOCX, 14KB\]](#)

Performance Year: All

*ACO ID / Name: Select an ACO ID / Name

*Category: Select a Category

Material Code: All

Material ID:

Search

How to create a new errata material:

1. Select **New Errata Material** from the secondary navigation.
2. On the **New Errata Original Material Search** page (**Figure 4**), select an **ACO ID / Name** and **Category**, and then select **Search**.
3. Review the information provided on the **Select Original Material(s)** page (**Figure 5**).
 - a. **Unselected Original Material ID** – Approved Original Material ID(s) that are assigned to the user currently logged in.
 - b. ***Selected Original Material ID** – Original Material ID(s) to which the new errata material applies.
4. Select up to five (5) Original Material IDs, and then select **Next**.

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5. Fill out the New Errata Material form (**Figure 6**). Required fields are preceded by an asterisk (*). A complete field listing is provided below:
 - a. ***Performance Year** – The year the material will be used.
 - i. Note: The Performance Year is NOT the same as the ACO Agreement Year. The Performance Year is the Calendar Year in which the material is to initially be used.
 - b. ***Reviewer** – You may select any available reviewer name.
 - c. ***Material ID** – The user-created unique identifier for the material.
 - d. ***Material Code** – The material code assigned to the material.
 - i. *Note: Errata Materials can only be submitted with Material Codes that allow Errata. The allotted review period is determined by the material code. For more information, see the [Material Code Lookup section](#).*
 - e. ***Material Description** – Brief description of the material.
 - f. ***Total Pages** – The total number of pages of the material.
 - g. **Comments** – Applicable comments.
 - h. ***Material** – Select **Browse** to upload a file from your PC, Choose the file, and select **Open**.
6. After completing all information, select **Next**.
7. Review the information provided on the **New Errata Material Verification** page (**Figure 7**).
 - a. If further changes need to be made, select **Back**.
 - b. If the information is correct, select attestation checkbox and select **Submit** to save the updates.
8. Upon submission, the Confirmation page is displayed (**Figure 23**). For more information on Email Notifications, please see the [Confirmations and Email Notifications section](#).
9. Select **Ok** to return to the New Errata Material Page.

Figure 5: Select Original Material Page

Home » SSP ACO Marketing » New Errata Material » *Select Original Material(s)*

Select Original Material

ACO Marketing +

A field with an asterisk (*) before it is a required field.

Note: You can only select up to 5 Original Material IDs.

Criteria: **Performance Year** = All; **ACO ID** = A0000; **Category** = 03000; **Material Code** = All; **Material ID** = All;

Unselected Original Material ID:

- Original Material 1
- Original Material 2

***Selected Original Material ID:**

Buttons: Add →, ← Remove, ← Remove All

Buttons: Back, Next

Figure 6: New Errata Material Page

Home » SSP ACO Marketing » New Errata Material » Select Original Material(s) » *New Errata Material*

New Errata Material ACO Marketing +

A field with an asterisk (*) before it is a required field.

***Performance Year:**

ACO ID / Name: A0000 - Sample ACO Organization 0

Original Material:

- [Original Material 1 \[PDF, 12KB\]](#)
- [Original Material 2 \[DOCX, 13KB\]](#)

***Reviewer:**

***Material ID:**

Category: 03000 - Notices

***Material Code:**

***Material Description:**

***Total Pages:**

Comments:

Note(s):

- Filename cannot contain any of the following characters: # % + ; & ..
- Accepted File Types: .pdf, .doc, .txt, .jpg, .gif, .ppt, .zip, .xlsx, .docx, .pptx.
- .zip files cannot contain invalid file types.

***Material:**

Figure 7: New Errata Material Verification Page

Home » SSP ACO Marketing » New Errata Material » Select Original Material(s) » Verification

Verification ACO Marketing +

A field with an asterisk (*) before it is a required field.

If all information below is correct, select the "Submit" button. Otherwise, select the "Back" button to return to the previous page.

Performance Year: 2017

Reviewer: Enghauser, Matt

ACO ID / Name: A0000 - Sample ACO Organization 0

Original Material ID: Original Material 1
 Original Material 2

Material ID: Sample Errata Material

Category: 03000 - Notices

Material Code: 03099 - Errata - Notices

Material Description:

Material Status: Pending

Material: [Test ZIP File \[ZIP, 21KB\]](#)

Total Pages: 22

Comments:

*I, **John Doe** attest to the completeness and accuracy of the following marketing material: **Sample Errata Material**. Based on my best knowledge, information, and belief, all information submitted to CMS in these documents are accurate, complete, and truthful. Note: this attestation applies to all material types and attributes, including errata material submission, as applicable.

5 Revise Material

The purpose of the **Revise Material** function (**Figure 9**) is to allow a user to submit a corrected material that was previously “Disapproved” by a CMS Reviewer.

Figure 8: Revise Material Page

ACO ID	Material ID	Rev #	Material Code	Disapproved Date	Action
A0000	Sample Material	0	01001	06/12/2017	Revise

How to revise a disapproved material:

1. Select **Revise Material** from the secondary navigation.
2. On the **Revise Material** page (**Figure 8**), select the material to revise from the **Action** column.
3. On the Revise page (**Figure 9**), enter any notes in the **Comments** field.
4. Select **Browse** to upload a file from your PC, Choose the file, and select **Open**.
5. Select **Next**.
6. Review the information provided on the **Revise Verification** page (**Figure 10**).
 - a. If further changes need to be made, select **Back**.
 - b. If the information is correct, select attestation checkbox and select **Submit** to save the updates.
7. The **Confirmation** page displays (**Figure 23**). For more information on Email Notifications, please see the [Confirmations and Email Notifications section](#). Select **Ok**. *Note: When the Revision is Approved, the AMD information for the material will reset.*

For more information on AMD, see [Actual Mail Date \(AMD\) section](#) and [Update AMD section](#).

Figure 9: Revise Page

Home » SSP ACO Marketing » Revise Material » Revise

Revise ACO Marketing +

A field with an asterisk (*) before it is a required field.

Performance Year: 2016

*Reviewer:

ACO ID / Name: A0000 - Sample ACO Organization 0

Material ID: Sample Material

Revision No: 1

Category: 01000 - Advertising

Material Code: 01001 - Newspaper

Alternate Format: No

Alternate Format Original Material ID:

Template Used without Modification: No

Material Description:

Total Pages: 1

*Comments:

Note(s):

- Filename cannot contain any of the following characters: # % + ; & ..
- Accepted File Types: .pdf, .doc, .txt, .jpg, .gif, .ppt, .zip, .xlsx, .docx, .pptx.
- .zip files cannot contain invalid file types.

*Material:

Figure 10: Revise Verification Page

Home » SSP ACO Marketing » Revise Material » Revise » Revise Verification

Revise Verification

ACO Marketing +

A field with an asterisk (*) before it is a required field.

If all information below is correct, select the "Submit" button. Otherwise, select the "Back" button to return to the previous page.

Performance Year: 2016

Reviewer: Doe, Jane ▾

ACO ID / Name: A0000 - Sample ACO Organization 0

Material ID: Sample Material

Revision No: 1

Category: 01000 - Advertising

Material Code: 01001 - Newspaper

Alternate Format: No

Alternate Format Original Material ID:

Template Used without Modification: No

Material Description: test

Total Pages: 1

Comments: Revised Material attached

Material: [Test PDF File \[PDF, 12KB\]](#)

*I, **John Doe** attest to the completeness and accuracy of the following marketing material: **Sample Material**. Based on my best knowledge, information, and belief, all information submitted to CMS in these documents are accurate, complete, and truthful. Note: this attestation applies to all material types and attributes, including errata material submission, as applicable.

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6 Material Search

The purpose of the **Material Search** (Figure 11) function is to allow the user to search for existing materials.

Figure 11: Material Search Page

The screenshot shows the Material Search page with the following elements:

- Home » SSP ACO Marketing » Material Search
- Add to My Favorites
- ACO Marketing +
- Performance Year: All
- ACO ID / Name: All
- Category: All
- Material Code: All
- Material ID: [Text Input]
- Material Status: All
- Reviewer: All
- Submitted Date From (MM/DD/YYYY): [Date Picker]
- Submitted Date To (MM/DD/YYYY): [Date Picker]
- Search

How to search for a material:

1. Select **Material Search** from the secondary navigation.
2. On the **Material Search** page (Figure 11), populate known search criteria (optional).
3. Select **Submit**.
4. The **Material Search Results** page (Figure 12) is displayed.

Figure 12: Material Search Results Page

Home » SSP ACO Marketing » Material Search » Search Results

Material Search Results ACO Marketing +

Criteria: **Performance Year** = All; **ACO ID** = All; **Category** = All; **Material Code** = All; **Material Status** = Template Approved; **Material ID** = All; **Reviewer** = All; **Submitted Date From** = All; **Submitted Date To** = All;

Result(s) 1 to 3 (of 3)

ACO ID	Material ID	Rev #	Material Code	Material Status	Submitted Date	Business Days Left	Action
A0000	Material 1	0	03002	Template Approved	07/13/2016		View
A0000	Material 1	0	03002	Template Approved	07/13/2016		View
A0000	Original Material 1	0	03001	Template Approved	07/20/2016		View

[Back](#)

7 View Material

The purpose of the **View Material** function (**Figure 13**) is to view the material details of the existing materials in the HPMS ACO Marketing Module.

Figure 13: View Material Page

Home » SSP ACO Marketing » Material Search » Search Results » View Material

ACO Marketing +

View Material

A field with an asterisk (*) before it is a required field.

Details

Material ID: Houston Astros 1d04_6202

Submitted Date: 05/26/2016

Reviewer: Enghauser, Matt

Material Status: Disapproved

Disapproval Reason: 01 - The wrong material code is selected for the material submitted

Revision Number: 0

Performance Year: 2016

ACO ID / Name: A0000 - Sample ACO Organization 0

Category: 02000 - Presentations/Scripts/Surveys

Material Code: 02001 - Surveys/Assessments

[ACO Contact Information](#) [Transaction History](#)

Attachment

Material: Test PDF File [PDF, 12KB]

Total Pages: 237

Description: Far far away, behind the word mountains, far from the countries Vokalia dna Consonantia, there live the blind texts. Separated they live in Bookmarksgrove right at the coast of the Semantics, a large

Attributes

Template Used without Modification

Alternate Format

Original Material ID: Original Material ID 684

No Longer in Use

as of (MM/DD/YYYY):

Non-Compliant

as of (MM/DD/YYYY):

Supporting Files

The attachments in this table can be accessed by selecting the hyperlinks in the Supporting File column.

Date	Uploaded By	Supporting File
06/28/2016	Doe, John	Test DOCX File [DOCX, 13KB]

How to view a material:

1. Search for material using **Material Search**.
2. On the **Material Search Results** page, select the **View** link.
3. The following fields are displayed on the View Material page (**Figure 13**):
 - a. **Original Material(s)** – Only applicable for Errata Materials.
 - b. **No Longer in Use** – The material is no longer in use. See section 5.1 for further details.
 - c. **(No Longer in Use) as of (date)** – The date the material was no longer used.
 - d. **Non-Compliant** – Material is non-compliant. This field may be populated by CMS only.
 - e. **(Non-Compliant) as of (date)** – The date when the material was found to be non-compliant. This field may be populated by CMS only.
 - f. **Action** – Actions that are available for the given material (based on status). For more information on available actions, see the [Update AMD section](#) and [Update Material section](#).
 - i. *Note: If no action is available for the given status, the Action dropdown will not appear.*
 - g. **Supporting Files** – Files that were attached to the material by CMS when disapproved (e.g. marked up material submission with suggested revisions, current version of template, etc.).
 - i. *Note: If no supporting files are attached, this section will not appear.*

7.1 ACO Contact Information

The purpose of the **ACO Contact Information** function (**Figure 14**) is to provide ACO contact information in a read only format.

Figure 14: ACO Contact Information Page

Sample ACO Organization 1 (A0000)

Details

ACO Entity:

- ACO professionals in a group practice arrangement
- Networks of individual practices of ACO professionals
- Partnerships or joint venture arrangements between hospitals and ACO professionals
- Hospital employing ACO professionals

Medicare Shared Savings Program Track: Track 1 (one-sided model: shared savings)

Data Use Agreement (DUA) Number: 123456

Trade Name / DBA: Sample ACO Organization

Address: 12601 FAIR LAKES CIRCLE
FAIRFAX, VIRGINIA 22033

Web Page: www.cgi.com

Contract Status: Active

Termination Date:

Region Responsible: Atlanta

ACO Marketing Contact (Primary)

Name: Smith, John

Address: 1234 PRESIDENTIAL WAY
SUITE 100
FAIRFAX, VIRGINIA 22033

Phone: (123) 456 - 7890 x1234

Fax: (123) 456 - 7891

Email: john.smith@cgi.com

CMS Regional Office Coordinator

Name: Doe, John

Address: 12601 FAIR LAKES CIRCLE
FAIRFAX, VA 22033

Phone: (703) 227 - 6000

Fax: (703) 227 - 6001

Email: john.doe@cgi.com

Note: For Parent Materials, this page will only display information for the first ACO ID in the group.

How to view ACO Contact Information:

1. Search for material using **Material Search**.
2. On the **Material Search Results** page, select the **View** link.
3. On the **View Material** page, select the **ACO Contact Information** link.

7.2 Transaction History

The purpose of the **Transaction History** function (**Figure 15**) is to provide a history of transactions for a material, including detail information of the current status and all previous activity on the item. A complete field listing is provided below:

1. **Date** – Date action was taken.
2. **Rev # / File** – Revision number with hyperlink to uploaded file.
3. **Material Status** – Material Status associated with the action.

4. **Action** – Displays the associated actionable event; complete list of actionable events defined below:
 - a. New
 - b. Revise
 - c. Update
 - d. Update AMD
 - e. Update Reviewer
5. **Modified By** – User that took the action.
6. **Comments** – List comments provided by User when action was taken.

Figure 15: Transaction History Page

Transaction History						
Material ID: Florida Care						
Submitted Date: 7/27/2015						
Performance Year: 2016						
ACO ID / Name: A0000 - Sample ACO Organization 1						
Category: 04000 - Forms						
Material Code: 04001 - Consent to Change Personal Health Information Preferences Form						
Date	Material Status	Action	Modified By	Revision #	File	Comments
07/27/2015	Pending	Revise	Doe, Jane	1	Test 3 [DOCX, 12KB]	revised material for Florida
07/27/2015	Disapproved	Update	Doe, John			Disapproved
07/27/2015	Template Approved	Update AMD	Doe, Jane			
07/27/2015	Template Approved	New	Doe, Jane	0	Test 3 [DOCX, 12KB]	

How to view Transaction History:

1. Search for material using **Material Search**.
2. On the **Material Search Results** page, select the **View** link.
3. On the **View Material** page, select the **Transaction History** link.

7.3 Actual Mail Date (AMD)

The purpose of the **Actual Mail Date (AMD)** function (**Figure 16**) is to provide a material’s mailing history on a revision by revision basis in a read only format. This screen lists the mail dates and beneficiary information that have been submitted for one or multiple mailing waves as applicable. If the ACO has indicated that a final mailing wave has occurred for the material, it will be displayed on this page.

Note: If a material revision exists, waves for each revision will be displayed separately, but not until the first wave of AMD information has been added.

Figure 16: Actual Mail Date (AMD) and Beneficiary Information Page

Actual Mail Date (AMD) and Beneficiary Information

ACO ID / Name: A0000 - Sample ACO Organization 1

Material ID: Material 1

Initial

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9	Wave 10
Actual Mail Date	08/16/2013									
# of Bene	50									

How to view AMD:

1. Search for material using **Material Search**.
2. On the **Material Search Results** page, select the **View** link.
3. On the **View Material** page, select the **Actual Mail Date (AMD)** link. Note: *If the material code does not allow AMD and beneficiary information, the Actual Mail Date (AMD) link will not be available on this page. For more information, see the [Material Code Lookup section](#).*

7.4 Update AMD

The purpose of the **Update AMD** function (**Figure 17**) is to allow ACO Users to enter AMD/Beneficiary information for Approved materials. This page is not intended to edit existing actual mail dates and beneficiary information.

Figure 17: Update AMD and Beneficiary Information Page

Home » SSP ACO Marketing » Material Search » Search Results » Update AMD and Beneficiary Information

Update AMD and Beneficiary Information ACO Marketing +

ACO ID / Name: A0000 - Sample ACO Organization 0

Material ID: Material 1

Revision Number: 0

Submitted Date: 07/13/2016

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9	Wave 10
AMD (MM/DD/YYYY)	06/12/2017									
# Beneficiaries	540									

Final Mailing Wave

Back Submit

How to add a new AMD wave:

1. Search for material using **Material Search**.
2. On the **Material Search Results** page, select the **View** link.

3. Select **Update AMD** from the **Action** dropdown and select **Next**. *Note: The Update AMD function only applies to materials that:*
 - a. *Have an Approved material status (i.e., Approved, Template Approved, or Deemed Approved)*
 - b. *Have a Material Code that allows AMD information.*
For more information, see the [Material Code Lookup section](#).
 - c. *Do not have the Final Mailing Wave checkbox checked.*
 - d. *All of these conditions must be met to submit AMD/Beneficiary information for a material.*
4. In the first available wave, enter the actual mail date. *Note:*
 - a. *Existing waves cannot be edited by the ACO Organization. Please contact your CMS Reviewer to update existing wave AMD/Beneficiary information.*
 - b. *The AMD cannot be in the future, and cannot be before the material's Submitted Date.*
5. In the first available wave, enter the number of beneficiaries the material was sent to.
 - a. *Note: More than one wave can be entered at once; however, it is not required to fill out all waves at one time.*
6. If entering the final mailing wave for the material, select the **Final Mailing Wave** checkbox.
 - a. *Note: Once the Final Mailing Wave checkbox is selected, the material will not accept new AMD/Beneficiary waves. If a final mailing wave was indicated by mistake, please contact your CMS Reviewer.*
7. Select **Submit**.
8. A verification dialog box is displayed.
 - a. To cancel, select **Cancel**.
 - b. Select **Ok** to save the updates.
9. The **Confirmation** page displays (**Figure 23**). Select **Ok**.
 - a. *Note: ACO users will have the ability to submit new sets (wave 1 to wave 10) of AMD/beneficiary information for each revision of a marketing material.*

7.5 Update Material

The purpose of the **Update Material** function (**Figure 18**) is to flag materials as no longer in use by the ACO.

Figure 18: Update Material Page

Home » SSP ACO Marketing » Material Search » Search Results » Update Material

Update Material ACO Marketing +

A field with an asterisk (*) before it is a required field.

Details

Material ID: Material 1

Submitted Date: 07/13/2016

***Reviewer:**

Material Status:

Revision Number: 0

Performance Year: 2016

ACO ID / Name:

Category: 03000 - Notices

Material Code: 03002 - Beneficiary Information Notice

ACO Contact Information
Transaction History
Actual Mail Date (AMD)

Attachment

Material: Test file 3 [DOCX, 12KB]

Total Pages:

Description:

Attributes

Template Used without Modification

Alternate Format

Original Material ID:

***No Longer in Use**

*as of (MM/DD/YYYY):

Non-Compliant

as of (MM/DD/YYYY):

***Comments:**

How to update a material as no longer in use:

INFORMATION NOT RELEASABLE TO THE PUBLIC UNLESS AUTHORIZED BY LAW:

This information has not been publicly disclosed and may be privileged and confidential. It is for internal government use only and must not be disseminated, distributed, or copied to persons not authorized to receive the information. Unauthorized disclosure may result in prosecution to the full extent of the law.

1. Search for material using **Material Search**.
2. On the **Material Search Results** page, select the **View** link.
3. Select **Update** from the **Action** dropdown and select **Next**.
 - a. *Note: The Material No Longer in Use function only applies to materials that have Approved dispositions (i.e., Approved, Template Approved, and Deemed Approved). This field may be populated by the ACO Organization if the material is no longer to be used in the marketplace. If viewing materials without an approved status, the Action dropdown will not appear.*
4. On the **Update Material** page (**Figure 18**), select **No Longer in Use**.
5. In the related **as of** date field, select the date on which the material was no longer in use.
 - a. *Note: The date cannot be in the future and cannot be before the material's Submitted Date.*
6. Enter any notes in the **Comments** field.
7. Select the attestation checkbox.
8. Select the **Next**.
9. Review the information provided on the **Update Material Verification** page (**Figure 19**).
 - a. If further changes are required, select **Back**.
 - b. If the information is correct, select attestation checkbox and select **Submit** to save the updates.
10. The **Confirmation** page displays (**Figure 23**). For more information on Email Notifications, please see the [Confirmations and Email Notifications section](#). Select **Ok**.

Figure 19: Update Material Verification Page

Home » ACO Marketing » Material Search » Search Results » Update Verification

Update Verification ACO Marketing

A field with an asterisk (*) before it is a required field.

If all is correct, select the "Submit" button. Otherwise, select the "Back" button to return to the previous page.

Performance Year: 2016
Reviewer: Doe, John
ACO ID / Name: A0000 - Sample ACO Organization 0
Material ID: Material 1
Category: 03000 - Notices
Material Code: 03002 - Beneficiary Information Notice
Template Used without Modification: Yes
Alternate Format: No
Alternate Format Original Material ID:
No Longer In Use: Yes
No Longer In Use Date: 7/13/2016
Non-Compliant: No
Non-Compliant Date:
Material Status: Template Approved
Total Pages: 22
Material Description: This is the Material Description
Comments: This material is no longer in use.

*I, **Jane Doe** attest to the completeness and accuracy of the following marketing material: **Material 1**. Based on my best knowledge, information, and belief, all information submitted to CMS in these documents are accurate, complete, and truthful. Note: this attestation applies to all material types and attributes, including errata material submission, as applicable.

8 Available Reports

8.1 Material Code Lookup

The purpose of the **Material Code Lookup (Figure 20)** function is to allow the user to view all available material Categories and Codes, with their associated attributes.

Figure 20: Material Code Lookup Page

Home » SSP ACO Marketing » Material Code Lookup

Material Code Lookup ACO Marketing +

Result(s) 1 to 10 (of 35)

Category	Material Code	Template Available?	Review Business Days	AMD Available?	Errata Available?	Version	Effective Date
01000 - Advertising	01001 - Newspaper	No	5	No	No	1	07/01/2013
01000 - Advertising	01002 - Radio	No	5	No	No	1	07/01/2013
01000 - Advertising	01003 - TV	No	5	No	No	1	07/01/2013
01000 - Advertising	01004 - Billboard/Banner	No	5	No	No	1	07/01/2013
01000 - Advertising	01005 - Internet Web Pages	No	5	No	No	1	07/01/2013
01000 - Advertising	01006 - Marketing Posters	No	5	No	No	1	07/01/2013
01000 - Advertising	01007 - Newsletters	No	5	No	No	1	07/01/2013
01000 - Advertising	01008 - Fliers	No	5	No	No	1	07/01/2013
01000 - Advertising	01009 - Direct Mail Pieces with Benefit Information	No	5	Yes	No	1	07/01/2013
01000 - Advertising	01010 - Newspaper Ads with Benefit Information	No	5	No	No	1	07/01/2013

1 2 3 4

Note(s): Review Business Days listed as (5 / 0) equates to a 5 business day review period, unless a template is available and used without modification, in which case a 0 day review period applies.

How to lookup marketing code attributes:

1. Select **Material Code Lookup** function from the secondary navigation.
2. The **Material Code Lookup** page displays the following information on each code:
 - a. **Template Available?** - Is a Template available for this code?
 - b. **Review Business Days** - The number of business days allotted for CMS review of the material. Weekends and Federal holidays are not included.
 - c. **AMD Available?** – Shows whether Actual Mail Date is available for the code.
 - d. **Errata Available?** – Shows whether Errata material submission is available for the code.
 - e. **Version** – Provides the most recent version number of the code.
 - f. **Effective Date** – The date the code became available.

8.2 Material Listing Report

The purpose of the **Material Listing Report (Figure 21)** is to allow the user to see a report of all existing materials that they have access to.

Figure 21: Material Listing Report

Home » SSP ACO Marketing » Material Listing Report » Material Listing Report Results

Material Listing Report

ACO Marketing +

Criteria: Performance Year = All; ACO ID = All; Category = All; Material Code = All; Material Status = All; Material ID = Material 1; Reviewer = All; Submitted Date From = All; Submitted Date To = All;

[View PDF](#)

Total Materials: 2 Printed Date: 06/12/2017

ACO ID / Name	Material ID	Rev #	Material Status	Submitted Date	Non-Compliant?	Non-Compliant as of Date
A0000 - Sample ACO Organization 0	Material 1	0	Template Approved	07/13/2016	N	
A0000 - Sample ACO Organization 0	Material 1	0	Template Approved	07/13/2016	N	

How to view the Material Listing Report:

1. Select **Material Listing Report** from the secondary navigation.
2. On the **Material Listing Report Search** page, populate known search criteria (optional).
3. Select **Search**.
4. The **Material Listing Report** displays all existing materials that the user has access to, as well as the following information:
 - a. **ACO ID / Name** – The ID/name of the ACO which the material was submitted against.
 - b. **Material ID** - The user-created unique identifier for the material.
 - c. **Rev #** - The number of revisions material has undergone.
 - d. **Material Status** – The current material status of the material. For a list of all statuses, see the [Understanding the Material Status section](#).
 - e. **Submitted Date** – Provides the date the material was submitted.
 - f. **Non-Compliant?** – Shows whether material has been marked as non-compliant.
 - g. **Non-Complaint as of Date** – Date material was marked as non-compliant.
5. The user has the ability to generate a PDF version of this report, by clicking on the **Create PDF** link in the upper left portion of the page. This will allow the user to view and/or print this report in a PDF format.

8.3 Pending Material Report

The purpose of the **Pending Material Report (Figure 22)** is to display all pending materials for ACOs that the user has access to.

Figure 22: Pending Material Report

ACO ID / Name	Material ID	Material Code	Submitted Date	Business Days Left
A0000 - Sample ACO Organization 0	Test 2 EMAIL_LOG	01099 - Errata - Advertising	06/01/2017	-2

How to view the Pending Material Report:

1. Select **Pending Material Report** from the secondary navigation.
2. The **Pending Material Report** displays the following information on all pending materials that the user has access to:
 - a. **ACO ID / Name** – The ID/name of the ACO which the material was submitted against.
 - b. **Material ID** - The user-created unique identifier for the material.
 - c. **Material Code** – The material code assigned to the material.
 - d. **Submitted Date** – Provides the date the material was submitted.
 - e. **Business Days Left** – The number of business review days remaining for CMS review of the material.
 - i. *Note: The allotted review period is determined by the material code. For more information, see the [Material Code Lookup section](#).*
3. The user has the ability to generate a PDF version of this report, by clicking on the **Create PDF** link in the upper left portion of the page. This will allow the user to view and/or print this report in a PDF format.

8.4 Material Extract

The purpose of the **Material Extract** function is to allow the user to download a material data extract in .CSV format via a downloadable .ZIP file. The .ZIP file also includes a .TXT Readme file that contains a field legend.

How to view the Material Extract:

1. Select the **Material Extract** from the secondary navigation.
2. On the **Material Extract Search** page, populate known search criteria (optional).

3. Select **Submit**.
4. In the File Upload dialog box, select **Save** to save a copy of the file locally.
5. Once saved, the user can open or un-zip the file and can then import either the .CSV data file or the .TXT Readme file using an appropriate spreadsheet or database application.

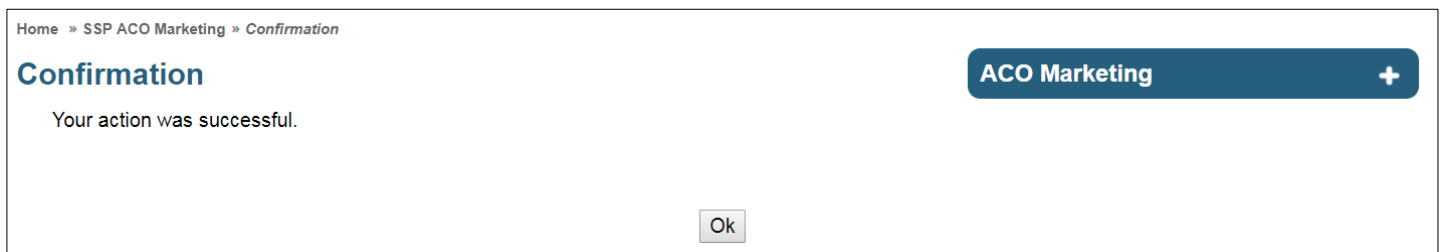
9 Confirmations and Email Notifications

The ACO Marketing Module provides confirmations for system updates and email notifications when pre-defined notification events occur.

9.1 Confirmations

A Confirmation page (**Figure 23**) is displayed for all system updates. *Note: The Confirmation page does not indicate that a notification event occurred, only that your changes were successfully saved.*

Figure 23: Confirmation Page



9.2 Email Notification Events

The following events are defined as “email notification events”:

- New Material and New Errata Material Submission
- Material Approval
- Material Disapproval
- Disapproval Follow Up – 15 Day
- Disapproval Follow Up – 30 Day
- Material Withdrawn by ACO
- Material Non-Compliance
- Material No Longer in Use
- Look Back Review Disapproval
- Look Back Review Disapproval Follow Up – 7 Day
- Look Back Review Disapproval Escalation – 14 Day

10 HPMS Contact Information

If you have questions or require assistance, please contact the appropriate party (**Table 1**).

Table 1: HPMS Contact Information

Contact	Phone / Email	Notes
HPMS Help Desk	1-800-220-2028 hpms@cms.hhs.gov	General HPMS Help
HPMS User Access	HPMS_Access@cms.hhs.gov	User Access Help
Lori Robinson	410-786-1826 Lori.Robinson@cms.hhs.gov	Director, DPD
Tim Hoogerwerf	410-786-9962 Timothy.Hoogerwerf@cms.hhs.gov	COR