

MA & MMP Material Review/Submission Checklist

General Information (The material will be returned if the checklist is incomplete, contains missing, abbreviated, or incorrect information.)

1. Name/Title of Material:			
2. Material Originator: <small>(person submitting in CodySoft)</small>		2a. Phone Number:	2b. Department:
3. Material Audience: <small>(Check All that apply)</small> <input type="checkbox"/> Centene plan use <input type="checkbox"/> Agent/Broker use <input type="checkbox"/> Employer Group <input type="checkbox"/> Member <input type="checkbox"/> Prospect <input type="checkbox"/> Provider use <input type="checkbox"/> Other <small>(describe in #8)</small>	4. Distribution Period(s): <small>(Check All that apply)</small> <input type="checkbox"/> Pre-AEP <input type="checkbox"/> AEP <input type="checkbox"/> MADP <input type="checkbox"/> SEP <input type="checkbox"/> Year Round <input type="checkbox"/> Other <small>(describe in #8)</small>	5. Contract Year: <small>(Check All that apply)</small> <input type="checkbox"/> CY 2017 <input type="checkbox"/> CY 2018	7. Section 1557 /NDL*: <small>(Check All that apply)</small> <input type="checkbox"/> N/A (not applicable) <input type="checkbox"/> MLI/NDL Insert used* <input type="checkbox"/> NDL on Material* <input type="checkbox"/> Larger than 8 ½ x11 <input type="checkbox"/> Smaller than 8 ½ x11 <input type="checkbox"/> Tri-fold (panel) <input type="checkbox"/> Other <small>(describe in #9)</small> <small>*NDL – Non-Discrimination Language, MLI – Multi Language Insert</small>
		6. Was a CMS model / template available? <small>(Include models in Zip file)</small> <input type="checkbox"/> YES (also complete side 2) <input type="checkbox"/> NO	
8. Material Purpose, Use and Intent:		Provide detailed explanation of how the material will be used, its purpose and/or intent. Make sure to note any yellow highlights due to changed model text or revisions to recently approved materials.	
9. Additional Instructional Information: Any additional instructional information that the Centene or CMS reviewers would need to know (such as identifying other supporting documents in Zip file, rationale for Section 1557/NDL or MLI use, template filing, etc.)			
10. Is this a Multi-Plan Sponsor MA Material per MMG Section 90.2.3?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
		10a. Lead Plan Sponsor Information. If yes, please provide: Lead Plan (LP) Sponsor name, LP material ID, LP Approval Date, Name and role of Coordinating Entity (CE)	
11. Alternate/Populated Version(s): <small>(Zip files must include translated or alternate format attestations from the vendor)</small> <input type="checkbox"/> Alternate Format (provide format): <input type="checkbox"/> Translated Language (provide language):		<input type="checkbox"/> Populated Template (provide version #): ___ of ___ <small>(Populated version(s) containing benefits, cost sharing or premiums must be submitted in CodySoft as a new project(s) within 30 days of use)</small>	
12. Previous Version History (Original / English material, Approved Template):	Material ID #:	Approval/File Date:	
13. Corporate Functional Business Lead Approval? <small>(Corporate review & approval required for Plan level materials = CodySoft ready)</small>	<input type="checkbox"/> Yes (also complete 13a) <input type="checkbox"/> No, Corporate submission		13a. Corp. Functional Business Lead: Name? Dept.?

14. Material Attestation Section (If any of the items below are determined as "Not Met" by Compliance, the material will be returned.)

REVIEWED FOR: <small>(Check All that apply)</small> <input type="checkbox"/> Medicare Advantage (MA) <input type="checkbox"/> Medicare-Medicaid Plan (MMP)	MA = CMS Marketing Manual Section #	MMP State Marketing Manual Section # <small>(MMP only)</small>	ORIGINATOR	N/A	MCDR Review	
					Met	Not Met
Used Plan Type Identifier	40.10	40.10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did <u>not</u> use "Seniors" or "Traditional Medicare"	40.4/90.1	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did <u>not</u> use absolute "superlatives"	40.4/90.1	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Font = 12 pt TNR equivalent/14 pt for MMP Health Ed	40.2	APL 11-018 (for CA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Correct cost sharing amounts	40.4/90.1	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did <u>not</u> use "free" when describing cost sharing	40.4/90.1	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contain Phone / TTY / State Relay "711"	40.7	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone numbers same font/style/TTY	40.7	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hours of Operation	40.6	40.6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Correct Disclaimers & Footnotes	50	50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disclaimers/Footnotes size = body text	40.2	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<Caret> = variable text. [Brackets] = adding or deleting info.	90.8	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MMP Material is at a 6th grade reading level		3-way Contract (Ex: § 2.9.10.8.4 for CA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MMP Compliance w/MOU and/or 3-way contract		MOU/ 3-way contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understandable Content, Typos / Grammar, Correct business Entity(s)	40.4, 90.1	3-way Contract (Ex: § 2.9.10.8.4 for CA)	<input type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Supporting Documentation	10	←	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Compliance Reviewer _____ Date _____

Model/Non-Model Materials (only complete this page if you answered "YES" to box 6)

15. Is the Centene version still model?	<input type="checkbox"/> Yes (model)	<input type="checkbox"/> No (non- model)
16. If "No" please explain in detail why it was modified from the CMS model.	<i>If no, please explain in detail why the text/format was modified from the CMS model. Also acknowledge that revised model text / formatted areas have been highlighted in yellow (or note removal of model text here).</i>	
17. CMS Model Name:	18. CMS Model Number (Exhibit, OMB, CMS Form, etc.):	19. CMS Source:

ATTACH THE CMS MODEL VERSION WHEN SUBMITTING THIS FORM FOR MODEL AND NON-MODEL DOCUMENTS.

Complete only if non-model marketing material was created when a CMS model exists:

As Vice President of this Centene Corporate functional business area, I:

- Authorize the use of a non-model version of this Marketing Material when a CMS model was made available for the reason provided on this form.
- Attest that all components of the CMS model exist in this non-model document.
- Understand that CMS Region X has commented during past audits that Centene needs to utilize more CMS models and templates.
- Have read and understand Centene's internal policy (MCARE.MCDR.01) for the use of model and non-model Marketing Materials. Originators will follow Centene policy to use CMS model documents. Refer to the Section 90.7 (and its sub sections) of the CMS "Chapter 3 – Medicare Marketing Guidelines".
- Provided the appropriate documentation in the CodySoft file that supports my decision to use a non-model material.
- Assume all risk of non-compliance for my area which may be caused by the use of this non-model material.
- Understand that this non-model material qualifies for a standard 45 day CMS review and that it runs the risk of not being approved.

20. Signature (Must be signed by VP of functional/operational area):	21. Date:
22. Print VP Name:	
23. VP Title:	

NOTE: Centene's MMRR (Medicare Material Regulatory Reviewer) will decide, after review, whether or not to submit this non-model material to CMS (and with Corporate Compliance on risks involved, if necessary).

Material Development Resources

- Centene Intranet Website (SharePoint):
https://cnet.centene.com/sites/MedicareSNP/Member_and_MarketingMaterials/Lists/Medicare%20Marketing%20Materials%20Final%20Documents/AllItems.aspx
- CMS Marketing Guidelines website: <http://www.cms.gov/Medicare/Health-Plans/ManagedCareMarketing/FinalPartCMarketingGuidelines.html>
- Additional guidance may include: CMS memos, current Call Letter, the Medicare Marketing Guidance (MMG) and/or other CMS regulatory requirements, and any other applicable Federal or State agency regulatory instruction (i.e. HIPAA, Medicaid, OCR, Section 1557, etc.)

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