



DEPARTMENT OF HEALTH & HUMAN SERVICES  
Centers for Medicare & Medicaid Services  
Center for Beneficiary Choices  
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**CENTER FOR BENEFICIARY CHOICES**

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**DATE:** October 6, 2005

**TO:** Medicare Advantage Organizations, Demonstrations, 1876 Cost Organizations, and Prescription Drug Plans

**FROM:** Gary Bailey, Deputy Director, Plan Policy and Operations

**SUBJECT:** ACTION REQUIRED BY 5:00 P.M. OCTOBER 10 – Updates to Organization and Plan Names in HPMS

This memo provides clarification on the naming conventions used to identify organizations and plans in the Health Plan Management System (HPMS) and the timeframes for updating these names for display in subsequent CMS rollout materials on [www.cms.hhs.gov](http://www.cms.hhs.gov) and in upcoming releases of Medicare Personal Plan Finder and the new Medicare Prescription Drug Plan Finder on [www.medicare.gov](http://www.medicare.gov).

It is the responsibility of your organization to update and maintain your organization's data in HPMS. Specifically, this memo concerns your organization and plan names. In order to ensure that your information is presented correctly in future releases of CMS rollout material and the web tools on [www.medicare.gov](http://www.medicare.gov), it is critical that you review and update, as necessary, your organization and plan names in HPMS by **Monday, October 10, 2005 at 5:00 p.m.** Otherwise, your organization and plan names will be presented as they are currently reflected in HPMS.

There are three names in HPMS: a legal entity name, an organization marketing name, and a plan name. The following information provides guidance on the naming conventions used, how to update these names, and how these names are used in CMS materials.

The **legal entity name** resides at the contract number level, and it is maintained by CMS in HPMS. Organizations can view this name in the HPMS Contract Management Module. If you identify a problem with your legal entity name, you should contact Scott Nelson ([scott.nelson2@cms.hhs.gov](mailto:scott.nelson2@cms.hhs.gov) or 410-786-1038) or Rochel Schnur ([rochel.schnur@cms.hhs.gov](mailto:rochel.schnur@cms.hhs.gov) or 410-786-4691) for PDP (or S) contract numbers and Marilyn Hunter ([marilyn.hunter@cms.hhs.gov](mailto:marilyn.hunter@cms.hhs.gov) or 410-786-9029) for all other contract numbers.

The **organization marketing name** also resides at the contract number level, and it is an alternative to the legal entity name that usually represents the name that would be recognizable to the public. If your contract number covers a service area that spans states, then HPMS will give you an opportunity to define **state-level organization marketing names**. In either case, these fields are maintained by your organization in HPMS. If you identify a problem with your

organization marketing name, you can change the name in the HPMS Contract Management Module. You can perform these updates at any time in HPMS.

The **plan name** resides at the plan ID level, and it is maintained by your organization in HPMS. If you identify a problem with a plan name, you can change the name in the HPMS Bid Submissions Module using the "Edit Marketing Data" function under the Manage Plans header. You can perform these updates at any time in HPMS.

Whenever an organization or plan name change occurs in HPMS, it is strongly recommended that you download a plan-specific data update to your local PBP software. This action will ensure that your local PBP remains synchronized with the names maintained in HPMS. You can perform this function in the HPMS Bid Submissions Module using the "Download Plan-Specific Information" function under the Manage Plans header.

The Medicare Personal Plan Finder and new Medicare Prescription Drug Plan Finder tools on the [www.medicare.gov](http://www.medicare.gov) website will use the "Organization Marketing Name" and "Plan Name" fields from HPMS. If your organization has defined state-level organization marketing names, the web tools will utilize those names in place of the standard organization marketing name. If you update an organization marketing name or plan name in HPMS, the change will be reflected in the next scheduled release of the web tools.

Please note that the PDF charts released on the [www.cms.hhs.gov](http://www.cms.hhs.gov) website on September 30, 2005 are using the "Organization Marketing Name" and "Plan Name" from HPMS.

Once again, we strongly encourage you to review and update your organization and plan names in HPMS by **5:00 p.m. Monday, October 10, 2005** to ensure that your data is reflected appropriately on our websites.

If you have any questions regarding this memo, please contact Lori Robinson at either [lori.robinson@cms.hhs.gov](mailto:lori.robinson@cms.hhs.gov) or 410-786-1826. Thank you.