



## Just Because a Medicare Asset Has a SMID, It Doesn't Mean You Can Use It

Medicare Advantage and Prescription Drug plan organizations must use a standardized tracking identifier, commonly called a SMID, to identify and track marketing materials filed in CMS' Health Plan Management System (HPMS). A TPMO cannot assume that a piece of marketing material can be used simply because it already has a SMID. A SMID is not a blanket authorization to use a piece of marketing material. Importantly, the SMID is tied to the entity that submitted and obtained approval for that material. This bulletin will explain SMIDs and what you need to know about them to ensure you use compliant marketing material.

- **What is a standardized material identification number (SMID)?**
  - A SMID is a unique identifier that Medicare Advantage (Part C) and Part D plan sponsors must place on beneficiary-facing marketing materials. CMS uses it to track, review, and oversee these materials.
- **Who creates the SMID?**
  - A SMID is created by the submitting TPMO, agency, agent, lead vendor, or other entity submitting the material in HPMS. The

identifier is developed by the submitter and should be unique to the material.

- A SMID generally includes:
  1. "MULTI-PLAN" for multi-plan marketing materials.
  2. A unique alphanumeric identifier selected by the submitting entity.
    - This identifier should be meaningful to the submitting TPMO, agency, agent, or lead vendor and help distinguish the material from other submissions.
  3. An uppercase "M" to designate marketing material.
- SMID Creation Example: MULTI-PLAN\_ABCAGENCYAEP27LP\_M

- **Why do we need SMIDs?**

- A SMID helps identify and track marketing materials by linking each document to its submission in HPMS, ensures the correct version is distributed, and supports compliance reviews and audits.

- **What assets require SMIDs?**

- A SMID is required on all Marketing materials.
- Communication materials are not required to have a SMID, and using one is optional. If a material includes "\_C" at the end of its identifier, it indicates the material is a communication piece. It does not mean the material was submitted to or approved for use through HPMS.

- **Who can use marketing material that already has a SMID?**

- Marketing material may only be used by the TPMO or downstream entity that submitted the marketing material through HPMS and received approval for its use.
- A SMID is specific to the entity that filed the material and does not authorize other TPMOs, agencies, downstream entities, or vendors to use the same material simply because they possess a copy of it.
- If another TPMO wishes to reuse the same marketing material, whether by purchasing or otherwise obtaining the material, it must first obtain permission from the applicable carrier(s), submit the marketing material in HPMS, and obtain the required carrier opt-ins for each applicable carrier before using the material.

- **How to use marketing material you did not originally create/file?**

- NOTE: A TPMO cannot simply reuse another organization's marketing material; it must complete its own submission of the material in HPMS and follow the carrier opt-in process.

- Each carrier has its own requirements for using cloned or identical marketing materials that were previously filed by another TPMO.
  - 1. A material can be considered a 'clone' or 'identical' if the material, and its attributes, exactly match a material owned and operated by a different TPMO that one or more carriers have already approved during and opted in to in HPMS.
- To use the 'clone' process, at a minimum, you will need to know and/or obtain the following:
  - 1. The exact SMID assigned to the marketing material in HPMS.
  - 2. The exact version of the marketing material that was submitted and approved in HPMS.
  - 3. The applicable carrier(s) for which the marketing material was submitted in HPMS.
  - 4. Documentation confirming the required HPMS carrier opt-ins for each applicable carrier.
- All marketing material must be submitted through your upline or AmeriLife affiliate partner following their respective carrier and HPMS filing process.

Should you have any questions about this guidance, please reach out to [Marketing Compliance](#)

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