



Marketing Material Approval Process for Medicare Advantage and Prescription Drug Plans: What Agencies Need to Know About “Cloned” Pieces

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CMS requires that TPMOs and agencies file marketing materials for their own use.

The approval of materials submitted on behalf of “ABC Agency” **only** applies to ABC Agency. If another agency within the YPC hierarchy wishes to use the same material, they must submit it separately, with their own unique SMID and obtain approval from AmeriLife Marketing Compliance for its own use. If the material has already been submitted

by another agency, filed in HPMS, and approved and opted into by the same carriers, it can be submitted as cloned material (see below).

YPC will not file lead vendor materials as “YPC” because YPC does not have direct contracts with these lead vendors. The only PY 2027 “YPC”-filed lead vendor materials are those offered through the Lead Star program with Wright Source.

How to use marketing material a downline did not originally create/file?

Each carrier has its own requirements for using cloned or identical marketing materials that were previously filed by another TPMO.

A material can be considered a ‘clone’ or ‘identical’ if the material and its attributes exactly match a material used by a different TPMO that one or more carriers have already approved and opted-in to in HPMS.

- To use the ‘clone’ process, at a minimum, you will need to know and/or obtain the following:
 - The exact SMID assigned to the marketing material in HPMS.
 - The exact version of the marketing material that was submitted and approved in HPMS.
 - The applicable carrier(s) for which the marketing material was submitted in HPMS.
 - Documentation confirming the required HPMS carrier opt-ins for each applicable carrier.

Reminders:

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