

This document is provided as an example of a charter and is intended to be educational in nature. This document does not constitute legal advice and does not substitute for legal advice when crafting an agreement. Entities should consult with an attorney or contract specialist when establishing such an agreement. The titles, abbreviations, and other terminology in this sample charter may need to be revised to fit your organization’s communication protocols or specific needs.

SAMPLE CHARTER FOR UMBRELLA HUB ARRANGEMENT PARTICIPATION

Purpose

[State purpose of umbrella hub arrangement (UHA)]

Goals

[State goals of UHA]

Objectives

[State objectives of UHA]

Structure

List of Project Members, Organizations, and Titles			
First Name	Last Name	Organization	Title
		[VENDOR]	
		[VENDOR]	
		Umbrella Hub Organization (UHO)	
		Subsidiary	
		Subsidiary	
		Subsidiary	
		Subsidiary	

Member Roles and Responsibilities		
Project Role	Responsibilities	Assigned to
Project Manager		
Claims Platform Vendor	Operate and maintain the claims platform.	[VENDOR]
UHO	Run the claims reimbursement workflow.	[UHO]
Subsidiary	Deliver the National Diabetes Prevention Program (National DPP) lifestyle change program and the Medicare Diabetes Prevention Program (MDPP) in accordance with Diabetes Prevention Recognition Program (DPRP) and Centers for Medicare and Medicaid Services (CMS) eligibility rules. Support development of payment model for the UHO.	Subsidiary
Subsidiary		Subsidiary
Subsidiary		Subsidiary

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[VENDOR] Responsibilities

1. Host and maintain the [VENDOR] software.
2. Enter into Master License Agreement including data sharing agreement and End User License Agreement with UHO that will enable access of a proprietary cloud-based claims processing service for the purposes of tracking Subsidiary participant programmatic data and insurance coverage information, and submitting claims on behalf of Subsidiaries.
3. Enter into an independent Data Sharing Agreement with each Subsidiary user organization to enable exchange of personal health information.
4. Enter into an independent End User License Agreement with each Subsidiary user organization that permits access of a cloud-based claims processing service for the purposes of tracking participant programmatic data and insurance coverage information, and submitting claims.
5. Conduct trainings on use of [VENDOR] platform with UHO and Subsidiaries.
6. Submit claims to Medicare and other insurers for the MDPP and National DPP lifestyle change program.
7. Submit invoice to UHO for recurring fees calculated on the first of every month for the previous month.

Subsidiary Responsibilities

1. Contribute to the development of the UHO charter.
2. Enter into Data Sharing Agreement with [UHO] that enables exchange of personal health information.
3. Enter into an End User License Agreement with [VENDOR] to access a proprietary cloud-based claims processing service for the purposes of tracking participant programmatic data and insurance coverage information, and submitting claims.
4. Participate in a training on use of [VENDOR] platform.
5. Provide DPRP required programmatic data to CDC's DPRP according to a submission schedule based on the UHO's effective date.
6. Participate in the development of a sustainable payment model, in partnership with [UHO] and Subsidiaries, to support the UHO's managed service costs associated with administrative support, quality improvement technical assistance, and data monitoring.
7. Attend monthly progress meetings to identify and resolve challenges, provide feedback on experiences, and discuss new opportunities for enriching the UHO model.
8. Assign liaison(s) to the project to ensure communication, planning, implementation, and evaluation of the UHO.

UHO Responsibilities

1. Complete the CDC DPRP Umbrella Hub application and maintain recognition status in good standing on behalf of Subsidiaries.
2. Lead the development of the UHO charter.
3. Enter into data sharing agreement with Subsidiary to enable exchange of personal health information.
4. Enter into Master License Agreement including data sharing agreement and end user license agreement with [VENDOR], the single source vendor selected for this project. The contract with [VENDOR] will enable access of a proprietary cloud-based claim processing

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service for the purposes of tracking Subsidiary participant programmatic data and insurance coverage information, and submitting claims on behalf of Subsidiaries.

5. Act as the secondary contact for the Subsidiary's CDC DPRP registration to link the Subsidiary with the UHO for the purposes of the CDC process of programmatic data evaluation and compliance.
6. Participate in the development of, and subsequently operate, a sustainable payment model, in partnership with Subsidiaries, to support the UHO's managed service costs associated with administrative services, quality improvement technical assistance, data monitoring, and claims processing.
7. Enroll with CMS as a MDPP supplier, with Subsidiaries registered as administrative locations, to facilitate claims submission and reimbursement.
8. Convene monthly progress meetings with Subsidiaries to identify and resolve challenges, provide feedback on experiences, and discuss new opportunities for enriching the UHO model.
9. Provide reports regarding the successful claims reimbursement process aligned with achieving project goal.
10. [UHO] will serve as a liaison between UHO Subsidiaries, CDC, [VENDOR], and other new partners or vendors that may join the umbrella hub arrangement.

Confidentiality is in effect between [UHO] and Subsidiaries, and Subsidiaries with one another. The discussions and interactions of the members are confidential. Internal discussions and materials will not be shared outside of the arrangement without the approval or consent of each member.

Constraints

* Costs associated with program promotion, enrollment, and retention are incurred by provider.

Success Factors

* Expedited MDPP supplier enrollment status.

* Access to a vetted claims platform vendor.

* Large-scale attention and investment directed towards normalizing National DPP lifestyle change program.

Meetings and Events

* Minimum of two meetings per month through [DATE] and then adjusted for next term.

* Participate in media events designed to raise umbrella hub arrangement visibility, e.g., press alerts and releases.