

# UNDERSTANDING 2024 AMA DATA AND FEES

## AMA Data and Fees

- Fees may apply when data from the American Medical Association (AMA) is requested in a Third Party Request.
- Please see the table below for examples of prescriber level data elements that may be related to, and/or derived from, AMA data.

## AMA Requirements

- The AMA requires that AMA data remain in the United States, unless legally approved otherwise. If offshore resources will be accessing AMA data remotely from an offshore location, the vendor must identify the country location to receive approval from the AMA.
- The type of agreement and associated fees are dependent on four main criteria:
  1. Vendor Legal Entity Location (foreign license consideration),
  2. AMA Use(s),
  3. frequency of delivery of or access to AMA data, and
  4. length of the Third Party holding or accessing AMA data.

## Understanding what are AMA or AMA informed data:

<input type="checkbox"/> Address Type	<input type="checkbox"/> Birth Year	<input type="checkbox"/> Census Data Codes	<input type="checkbox"/> CMS UPIN 
<input type="checkbox"/> Fax Number	<input type="checkbox"/> Gender Code	<input type="checkbox"/> Geographic Codes	<input type="checkbox"/> Graduate Medical Training
<input type="checkbox"/> Graduation Data	<input type="checkbox"/> Historical Licensure Data	<input type="checkbox"/> Hospital Affiliation	<input type="checkbox"/> IQVIA Prescriber ID 
<input type="checkbox"/> License State Abbreviation	<input type="checkbox"/> M.D., D.O. Indicator	<input type="checkbox"/> Major Professional Activity	<input type="checkbox"/> Medical Education Number (ME#) (Not permitted for Lettershop uses)
<input type="checkbox"/> Name	<input type="checkbox"/> No Contact Indicator	<input type="checkbox"/> NPI Number	<input type="checkbox"/> Office Address
<input type="checkbox"/> PDRP Flag	<input type="checkbox"/> Physician Recognition Award Recipients	<input type="checkbox"/> Preferred Mailing Address	<input type="checkbox"/> Present Employment
<input type="checkbox"/> Presumed Dead Flag	<input type="checkbox"/> Primary Office Address	<input type="checkbox"/> Specialty	<input type="checkbox"/> Specialty – Primary Secondary
<input type="checkbox"/> State License Expiration Date	<input type="checkbox"/> State License Number	<input type="checkbox"/> State License Type	<input type="checkbox"/> Telephone Number
<input type="checkbox"/> Type of Practice	<input type="checkbox"/> Undeliverable Address Flag		

## Understanding Types of Third Party AMA Agreements and Fees *(if applicable):*

Please “**Note**”, AMA Use selections across the agreement types below, and/or data holding or receipt with a greater frequency or term than expressed in criteria below will result in a different Third Party AMA Agreement and possible fees.

Type of Third Party AMA Agreement	AMA Criteria	2024 AMA Third Party Fees
<p><b>Lettershop</b></p>	<p>Service Provider requires <b><u>access to data 90 days or less per project</u></b> for mail, telemarketing, and prescriber recruitment <b><u>ONLY</u></b>. Any market research must be a result of physician contact. <b>Can perform multiple distinct projects within the calendar year* based on Lettershop criteria only.</b></p> <p><b>AMA Uses may include:</b> Direct to prescriber communications such as packaging, personalized letters, printing, assembly, inserting, labeling, distribution and mailing, email broadcasting, and market research projects that include physician perception and attitude studies, positioning and messaging studies; analysis of market research results, and focus groups.</p> <p><b>Note –</b></p> <ul style="list-style-type: none"> <li>• Medical Education Number (ME#) is not permitted for sharing for any Lettershop use no matter the agreement type provided.</li> <li>• If duration of project is <u>greater than 90-days</u>, your Third-Party Vendor will require a Service Bureau II agreement (see criteria on following pages).</li> </ul>	<p>No Fee</p>
<p><b>Service Bureau I [SBI]</b></p>	<p>Service Provider requires <b><u>access to data 90 days or less per project; onetime or quarterly deliveries of data per calendar year*</u></b>.</p> <p><b>AMA Uses may include:</b> production of reports, statistical analysis, technical support, market forecasting, market opportunity assessment and sizing, market segmentation and situation analysis, territory alignment, targeting reports, tele-detailing and e-detailing.</p> <p><b>Note –</b> if duration of project and frequency of deliverables are more frequent than above, your Third-Party Vendor will require a Service Bureau II agreement (see criteria on following pages).</p> <p><b>*AMA Use Exception:</b> “Prescriber List Match only for overlap analysis, No prescriber communication” can be covered under an SBI if access to data <u>90 days or less per project</u>; no matter the frequency of deliveries.</p> <p><b>Note –</b> if duration of project is <u>greater than 90-days</u>, your Third-Party Vendor will require a Service Bureau II agreement (see criteria on following pages).</p>	<p>No Fee</p>

## Understanding Types of Third Party AMA Agreements and Fees *(if applicable):*

Please “**Note**”, AMA Use selections across the agreement types below, and/or data holding or receipt with a greater frequency or term than expressed in criteria below will result in a different Third Party AMA Agreement and possible fees.

Type of Third Party AMA Agreement	AMA Criteria	2024 AMA Third Party Fees
<p><b>Service Bureau II [SBII]</b></p>	<p>Service Provider requires ongoing access to data and projects that are greater than 90 days, services that require the “refresh” of data more frequently than quarterly per year* regardless of AMA Use and/or specific AMA Uses are considered AMA SBII Uses regardless of project duration/frequency.</p> <p>The following AMA Uses will result in a SBII regardless of project duration/frequency: banner ads, call reporting/planning, incentive compensation, maintain data for reporting or archiving, prescriber authentication/verification (written approval from AMA required), sales reporting, and salesforce automation.</p> <p><b>Important Notes -</b></p> <ul style="list-style-type: none"> <li>• <i>Regardless of AMA Use type</i>, if the <i>duration</i> of a project <i>and/or frequency</i> of deliverables are longer or more frequent than the criteria of a SBI and/or Lettershop, your Third-Party Vendor will require a Service Bureau II agreement.</li> <li>• If project includes a <i>mix of SBI/Lettershop AMA Uses with SBII AMA Uses</i>, your Third-Party Vendor will require a Service Bureau II agreement.</li> </ul>	<p>\$21,000 per calendar year* per client with a cap of \$105,000 per <u>calendar year</u>*.</p> <p>Proration within the <u>calendar year</u>* only applies if project begins <u>after</u>:</p> <ul style="list-style-type: none"> <li>• July 1st, fees will be reduced to \$10,500 for the calendar year*.</li> <li>• October 1<sup>st</sup>, fees will be reduced to \$5,250 for the calendar year*.</li> <li>• If project continues into the next calendar year*, \$21,000 for the next calendar year* will apply.</li> </ul>

## Client / Vendor Job Aid

<p><b>Contracted Sales Force (CSO)</b></p>	<p>Organizations who provide contract sales force or an augmented sales force for Rx Manufacturer or Med Device companies.</p> <ul style="list-style-type: none"> <li>• May use the data internally for data analysis, physician authentication, market research, telemarketing, and direct mail except for direct mail related to the provision of continuing medical education materials.</li> <li>• May use data to perform services allowed under Service Bureau II for users under applicable AMA agreements. provide a supplemental sales force, call reporting, sales reporting and data analysis as a result of a targeting list provided by Client, sample fulfillment and data maintenance or storage.</li> </ul>	<p>\$145,250 per year* with the ability to serve multiple Clients.</p>
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\***Calendar Year Definition:** A period from January 1 to December 31