

IPA Deliverable	Report Frequency	CY 2025 Reporting Period	IEHP Due Date	IEHP Policy Number (s)	Department(s)	File Naming Convention	SFTP Folder	Regulatory Measure(s)
	Trequency	1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					
		5/1-5/31	June 15, 2025					42 CFR Part 422.520 & Social Security Ac
Claims Timeliness	Monthly	6/1-6/30	July 15, 2025	MA 20F - Claims and Payment Appeal	Financial Compliance		Claims Timeliness /	
Reports	Wollding	7/1-7/31	August 15, 2025	Reporting	Tilianciai Compilance	IPACode_MTR_MM_2025	Month	Sections 1876(g)(6)(A), 1816(2)(A)
		8/1-8/31	September 15, 2025	_				
		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					
		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
Table 3 Payment		4/1-4/30	May 15, 2025					
Organization		5/1-5/31 6/1-6/30	June 15, 2025 July 15, 2025				IDA O LLA / NA /	CMCD A PATE CLASS
Determinations and	Monthly	7/1-7/31	August 15, 2025	MA 20F - Claims and Payment Appeal	Financial Compliance	IDAC-1- Hairana DVMTC MM 2025	IPA Oversight / Year / Month	CMS Program Audit, Universe Submissions for Random File Reviews
Reconsiderations		8/1-8/31	September 15, 2025	Reporting		IPACode_Universe_PYMTC_MM_2025	Month	for Random File Reviews
(PYMT_C)		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					
		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					
Table 1 Standard		5/1-5/31	June 15, 2025					
and Expedited Pre- Service	Monthly	6/1-6/30	July 15, 2025	MA 25E2 - Utilization Management -	UM		IPA Oversight / Year /	CMS Program Audit, Universe Submissions
Organization	Monuny	7/1-7/31	August 15, 2025	Reporting Requirements	UNI	IPACode_Universe_OD_MM_2025	Month	for Random File Reviews
Determinations		8/1-8/31	September 15, 2025					
Determinations		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					
		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					
IPA Medicare		5/1-5/31	June 15, 2025					
Cancellation	Monthly	6/1-6/30	July 15, 2025	MA 25E2 - Utilization Management -	UM		IPA Oversight / Year /	FDR Oversight
Universe	,	7/1-7/31	August 15, 2025	Reporting Requirements		IPACode_Cancellation Universe_MM_2024	Month	
		8/1-8/31	September 15, 2025					
		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					



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	Trequency	1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					
IPA Oversight-		5/1-5/31	June 15, 2025				IPA Oversight / Year /	
Monthly Denial	Monthly	6/1-6/30	July 15, 2025	MA 25E2 - Utilization Management -	UM	IPACode DenFiles MM 2025		FDR Oversight
Files	Wilding	7/1-7/31	August 15, 2025	Reporting Requirements	OWI	II ACOUC_DOIN NOS_WIWI_2025	Month	T DR Oversight
1 1100		8/1-8/31	September 15, 2025					
		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31 1/1-1/31	January 15, 2026 'February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					
		5/1-5/31	June 15, 2025					
IPA Oversight-		6/1-6/30	July 15, 2025	MA 25E2 - Utilization Management -			IPA Oversight / Year /	
Monthly Approval	Monthly	7/1-7/31	August 15, 2025	Reporting Requirements	UM	IPACode App File Rv MM 2025	Month	FDR Oversight
File Review		8/1-8/31	September 15, 2025	Reporting requirements		_ **		1
		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					
		1/1-1/31	February 25, 2025					
		2/1-2/28	March 25, 2025					
		3/1-3/31	April 25, 2025					
IPA Oversight-		4/1-4/30	May 25, 2025					
Monthly		5/1-5/31	June 25, 2025					
Cancellations/	Monthly	6/1-6/30	July 25, 2025	MA 25E2 - Utilization Management -	UM	IPACode Cancel File Rv MM 2024	IPA Oversight / Year /	FDR Oversight
Dismissals File	,	7/1-7/31	August 25, 2025	Reporting Requirements		IPACode_Dismissal_File_Rv_MM_2024	Month	9
Review		8/1-8/31	September 25, 2025					
		9/1-9/30	October 25, 2025					
		10/1-10/31	November 25, 2025					
		11/1-11/30	December 25, 2025					
		12/1-12/31	January 25, 2026					
		1/1-1/31 2/1-2/28	'February 15, 2025 March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					
IPA Oversight-		5/1-5/31	June 15, 2025					
Monthly Care		6/1-6/30	July 15, 2025	MA 25C1 - Care Management - Delegation			IPA Oversight / Year /	
Transition Cases	Monthly	7/1-7/31	August 15, 2025	and Monitoring	UM	IPACode TOC MM 2025	Month	FDR Oversight
Log		8/1-8/31	September 15, 2025					
		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					



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		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025	<u> </u>				
		3/1-3/31	April 15, 2025	_				
		4/1-4/30	May 15, 2025					
IPA Oversight-		5/1-5/31	June 15, 2025	_			FAX to IEHP's Long	FDR Oversight
Monthly Long	Monthly	6/1-6/30	July 15, 2025	MA 14F - Long-Term Care (LTC)	UM	TO 10 1 1 TO 10 1 10 1 10 10 10 10 10 10 10 10 10 10	Term Care fax line at	
Term Care (LTC)		7/1-7/31	August 15, 2025			IPACode_LTC_Data_MM_2025	(909) 912-1045	g
Data Sheet		8/1-8/31	September 15, 2025	-			(* ,	
		9/1-9/30	October 15, 2025	4				
		10/1-10/31	November 15, 2025	-				
		11/1-11/30	December 15, 2025	4				
		12/1-12/31	January 15, 2026					
		1/1-1/31	'February 15, 2025	4				
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025	4				
		4/1-4/30	May 15, 2025					
IPA Oversight-		5/1-5/31 6/1-6/30	June 15, 2025 July 15, 2025	MA 25F2 THE COMME			IDA O LLI / W	
Monthly Second	Monthly	7/1-7/31	August 15, 2025	MA 25E2 - Utilization Management -	UM	IPACode_Second Opinion Log_MM_2025	IPA Oversight / Year/ Month	FDR Oversight
Opinion Log		8/1-8/31	September 15, 2025	Reporting Requirements			Month	_
		9/1-9/30	October 15, 2025	-				
		10/1-10/31	November 15, 2025	-				
		11/1-11/30	December 15, 2025	-				
		12/1-12/31	January 15, 2026	-				
		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025	1				
		3/1-3/31	April 15, 2025	1				
		4/1-4/30	May 15, 2025	1				
		5/1-5/31	June 15, 2025	1				
		6/1-6/30	July 15, 2025	MA 21A - Medicare Dual Choice Encounter				
Encounter Data	Monthly	7/1-7/31	August 15, 2025	Data Submission Requirements	EDI	IPACode ENC MM 2025	5010 / Encounters	Encounter Data Submission Requirement
		8/1-8/31	September 15, 2025	IEHP Provider EDI Manual- IV-4		= = = ' '		
		9/1-9/30	October 15, 2025	1				
		10/1-10/31	November 15, 2025	1				
		11/1-11/30	December 15, 2025	1				
		12/1-12/31	January 15, 2026	1				
		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					GILL C. G. M.
		5/1-5/31	June 15, 2025					Guidelines for Care Management California- Specific Reporting - CA1.5,
Care Management	Monthly	6/1-6/30	July 15, 2025	MA 25C2 - Care Management	CM		IPA Oversight / Year /	CA1.6, CA1.12 Care Coordination and
Log Version 2.3	wioniny	7/1-7/31	August 15, 2025	Requirements - Reporting Requirements	Civi	IPACode_CM_MM_2025	Month	CMS/DHCS CA Demonstration Three-Way
		8/1-8/31	September 15, 2025	_				Contract 1-1-2018, section 2.5.2.8
		9/1-9/30	October 15, 2025	_				Contract 1-1-2018, section 2.5.2.8
		10/1-10/31	November 15, 2025	_				
		11/1-11/30	December 15, 2025	_				
		12/1-12/31	January 15, 2026					



IPA Deliverable	Report	CY 2025	IEHP Due Date	IEHP Policy Number (s)	Department(s)	File Naming Convention	SFTP Folder	Regulatory Measure(s)
IFA Deliverable	Frequency	Reporting Period		TEHT Folicy Number (s)	Department(s)	File Naming Convention	SFIF Folder	Regulatory Measure(s)
		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					
G Pl O . 1		5/1-5/31	June 15, 2025	MA 25C2 - Care Management			TDA O 11/X	
Care Plan Outreach Log Version 1.1	Monthly	6/1-6/30 7/1-7/31	July 15, 2025 August 15, 2025	Requirements - Reporting Requirements	CM	IPACode Outreach MM 2025	IPA Oversight / Year / Month	DHCS Policy Guide 12-2022
Log version 1.1		8/1-8/31	September 15, 2025	requirements - reporting requirements		II ACode_Oddreacii_iviivi_2023	Wilditti	
		9/1-9/30	October 15, 2025	1				
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025	1				
		12/1-12/31	January 15, 2026	1				
		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025	1				
		3/1-3/31	April 15, 2025	1				
		4/1-4/30	May 15, 2025	1				
		5/1-5/31	June 15, 2025]				
Interdiscipinary	Monthly	6/1-6/30	July 15, 2025	MA 25C2 - Care Management	CM		IPA Oversight / Year /	DHCS Policy Guide 12-2023
Care Team Log	Monuny	7/1-7/31	August 15, 2025	Requirements - Reporting Requirements	CIVI	IPACode_ICT_MM_2025	Month	DHC3 Folicy Guide 12-2023
		8/1-8/31	September 15, 2025					
		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					
		1/1-1/31	'February 1, 2025					
		2/1-2/28	March 1, 2025	-				
		3/1-3/31 4/1-4/30	April 1, 2025	-				
		5/1-5/31	May 1, 2025 June 1, 2025	-				
ECM Like		6/1-6/30	July 1, 2025	MA 12A3 - Care Management			IPA Oversight/ Year /	Per most current IEHP, NCQA, State and
Services PoF	Monthly	7/1-7/31	August 1, 2025	Requirements - Individualized Care Plan	CM	IPACODE_ECM_MM_2025	Month	regulatory guidelines
Reporting Log		8/1-8/31	September 1, 2025	requirements individualized cure riair			Wionai	regulatory guidelines
		9/1-9/30	October 1, 2025	1				
		10/1-10/31	November 1, 2025	1				
		11/1-11/30	December 1, 2025	1				
		12/1-12/31	January 1, 2026	1				
		1/1-1/31	'February 15, 2025					
		2/1-2/28	March 15, 2025	1				
		3/1-3/31	April 15, 2025	1				
	Monthly	4/1-4/30	May 15, 2025]			(0.1	
	garn.	5/1-5/31	June 15, 2025	1			/Credentialing/	
Credentialing and	(If IPAs are under	6/1-6/30	July 15, 2025	MC 25B10 - Credentialing Standards,	Credentialing	IPACode - YYYY-MM - Credentialing and	and Email to	Per most current IEHP, NCQA, State and
Recredentialing Report	a monitoring Plan or Correction	7/1-7/31	August 15, 2025	Credentialing Quality Oversight of Delegates	(CR)	Recredentialing Activities Report	Email to CredentialingProfileSubmi	regulatory guidelines
Кероп	Action Plan	8/1-8/31	September 15, 2025]			ssion@iehp.org	
	(CAP))	9/1-9/30	October 15, 2025]			ssion@ienp.org	
	(//	10/1-10/31	November 15, 2025]				
		11/1-11/30	December 15, 2025]				
		12/1-12/31	January 15, 2026]				



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	Frequency	Reporting Period	February 15, 2025		. '/	<u> </u>		
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
	Monthly	4/1-4/30	May 15, 2025					
		5/1-5/31	June 15, 2025				/Credentialing/	
Review of Recred		6/1-6/30	July 15, 2025	MC 25B10 - Credentialing Standards,	Credentialing	IPACode - YYYY-MM - Recredentialing Report	and	Per most current IEHP, NCQA, State and
Report provided by	_	7/1-7/31	August 15, 2025	Credentialing Quality Oversight of Delegates	(CR)	(IEHP to IPA Code)	Email to	regulatory guidelines
IEHP (by the 5th of each month)	or Correction Action Plan	8/1-8/31	September 15, 2025		, , ,		CredentialingProfileSubm ission@iehp.org	
of each month)	(CAP))	9/1-9/30	October 15, 2025				ission@ienp.org	
	(0/11/))	10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					
		1/1-1/31	February 15, 2025					
		2/1-2/28	March 15, 2025					
		3/1-3/31	April 15, 2025					
		4/1-4/30	May 15, 2025					
ID 4 E' ' 1		5/1-5/31 6/1-6/30	June 15, 2025 July 15, 2025					CHC COLOR LC
IPA Financial Viability Template	Monthly	7/1-7/31	August 15, 2025	MA 19A - Financial Viability	Financial Compliance	IPAName_Financial Viability_LOB_MM_2025	Financial Statements	California Code of Regulations: 1300.75.4.2
viability Template	-	8/1-8/31	September 15, 2025		-			1300./3.4.2
		9/1-9/30	October 15, 2025					
		10/1-10/31	November 15, 2025					
		11/1-11/30	December 15, 2025					
		12/1-12/31	January 15, 2026					
		1/1-3/31	May 15, 2025			IPACode - YYYY-Q1 - Credentialing and Recredentialing Activities Report		
		4/1-6/30	August 15, 2025	MC 25B10 - Credentialing Standards, Credentialing Quality Oversight of Delegates	Credentialing (CR)	IPACode - YYYY-Q2 - Credentialing and Recredentialing Activities Report	/Credentialing/	Per most current IEHP, NCQA, State and regulatory guidelines
Credentialing and Recredentialing	Quarterly	7/1-9/30	November 15, 2025			IPACode - YYYY-Q3 - Credentialing and Recredentialing Activities Report	and Email to CredentialingProfileSubm ission@iehp.org	
Report		10/1-12/31	February 15, 2026			IPACode - YYYY-Q4 - Credentialing and Recredentialing Activities Report		
Review of Recred Report provided by IEHP (by the 5th	port provided by	1/1-3/31	May 15, 2025	MC 25B10 - Credentialing Standards, Credentialing Quality Oversight of Delegates	Credentialing (CR)	IPACode - YYYY-MM - Recredentialing Report (IEHP to IPA Code)	/Credentialing/ and Email to CredentialingProfileSubmi	Per most current IEHP, NCQA, State and regulatory guidelines
of each month)		4/1-6/30	August 15, 2025				ssion@iehp.org	
		7/1-9/30	November 15, 2025				33iOii@iciip.oig	
		10/1-12/31	February 15, 2026					
Claims Quarterly		1/1-3/31	April 30, 2025	MA 20E Claims and Barrers A		IPACode_PDR_Q1_2025	CI. T. I. (V	/ Year 42 CFR Part 422.214, 417.558 and 422.520 & Social Security Act Sections 1852(k), 1894(b)(3)
Provider Payment Dispute Resolution	Quarterly	4/1-6/30	July 31, 2025	MA 20F - Claims and Payment Appeal Reporting	Financial Analysis	IPACode_PDR_Q2_2025	Claims Timeliness / Year / Month	
Report	·	7/1-9/30	October 31, 2025	Reporting	IPACode PDR Q3 2025		/ Wionin	
report	mort	10/1-12/31	January 31, 2026			IPACode_PDR_Q4_2025		



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Quarterly Balance Sheet, Income Statement, Cash flow Statement, Supporting Worksheets for IBNR. Copy of DMHC RBO		1/1-3/31	May 15, 2025					
	Quarterly	4/1-6/30	August 15, 2025	MA 19A - Financial Viability F	Financial Compliance	IPAName IBNR LOB MM 2025	Financial Statements	California Code of Regulations:
	()	7/1-9/30	November 15, 2025			1711 Walle_137.11_2023		1300.75.4.2
Quarterly Filing.		10/1-12/31	February 15, 2026					
		1/1-3/31	May 15, 2025					
Organizational	Quarterly (or upon updates)	4/1-6/30	August 15, 2025	MA 19A - Financial Viability	F: :16 F	That is a second of the second	Financial Statements	California Code of Regulations: 1300.75.4.2
Informational Disclosures		7/1-9/30	November 15, 2025		Financial Compliance	IPAName_Financial Info Disc_LOB_MM_2025		
		10/1-12/31	February 15, 2026					
Part C		1/1-3/31	May 15, 2025			IPACode PartC Claims Q1 2025		
Organization		4/1-6/30	August 15, 2025			IPACode_PartC_Claims_Q2_2025		
Determinations/Re	Quarterly	7/1-9/30	November 15, 2025	MA 25 - Delegation and Oversight	Claims	IPACode PartC Claims Q3 2025	IPA Oversight / Year /	Part C Reporting - Organization
considerations - Claims		10/1-12/31	February 15, 2026			IPACode_PartC_Claims_Q4_2025	Month	Determinations/Reconsiderations
		1/1-3/31	May 15, 2025			IPACode_PartC_Auths_Q1_2025		
Part C		4/1-6/30	August 15, 2025			IPACode PartC Auths Q2 2025		
Organization		7/1-9/30	November 15, 2025		****	IPACode_PartC_Auths_Q3_2025	IPA Oversight / Year /	Part C Reporting - Organization
Determinations/Re considerations - Authorizations	Quarterly	10/1-12/31	February 15, 2026	MA 25 - Delegation and Oversight	UM	IPACode_PartC_Auths_Q4_2025	Month	Determinations/Reconsiderations
IPA Oversight-		1/1-3/31	May 15, 2025			IPACode_UM Program Evaluation_HICE_Q1_2025		
Quarterly UM Program	Quarterly	4/1-6/30	August 15, 2025	MA 25E2 - Utilization Management -	UM	IPACode_UM Program Evaluation_HICE_Q2_2025	IPA Oversight / Year /	FDR Oversight
Evaluation /HICE Report		7/1-9/30	November 15, 2025	Reporting Requirements		IPACode_UM Program Evaluation_HICE_Q3_2025	Quarterly	1 DK Oversight
		10/1-12/31	February 15, 2026			IPACode_UM Program Evaluation_HICE_Q4_2025		



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IPA Oversight-		1/1-3/31	May 15, 2025			IPACode_UM Program Evaluation_HICE_Q1_2025		
Quarterly UM	0 (1	4/1-6/30	August 15, 2025	MA 25E2 - Utilization Management -	ID.	IPACode_UM Program Evaluation_HICE_Q2_2025	IPA Oversight / Year /	EDD O
Work plan Update / Evaluation /HICE	Quarterly	7/1-9/30	November 15, 2025	Reporting Requirements	UM	IPACode_UM Program Evaluation_HICE_Q3_2025	Quarterly	FDR Oversight
Report		10/1-12/31	February 15, 2026			IPACode_UM Program Evaluation_HICE_Q4_2025		
IPA Oversight- Semi-Annual	Semi-Annual (Q1 Plan)	1/1-2/30	March 15, 2025	MA 13E - Chronic Care Improvement		IPACode_CCIP_Q1 Plan_2025	IPA Oversight / Year / Semi Annual	
Chronic Care Improvement Program Activity (CCIP)	Semi-Annual (Progress Update)	3/1-8/31	September 15, 2025	Program (CCIP)	QM	IPACode_CCIP_Progress Update_2025	IPA Oversight / Year / Semi Annual	FDR Oversight
IPA Oversight- Semi-Annual QM	Semi-Annual	1/1-6/30	November 15, 2025	MA 25D1 - Quality Management Reporting	QM	IPACode_QM_Workplan Eval_Q1-Q2_2025	IPA Oversight / Year / Semi Annual	FDR Oversight
Work plan Update / Evaluation Report	Semi-Annual	7/1-12/31	February 15, 2026	Requirements		IPACode_QM_Workplan Eval_Q3-Q4_2025	IPA Oversight / Year / Semi Annual	I DR Oversign
Care Coordinator to Member Ratio Report	Annual	1/1-12/31	January 15, 2025	MA 25 - Section V - Organizational Structure and Staffing	CM	IPACode_CareCoord_2025	IPA Oversight / Care Coordinator Ratio	MMP Reporting 5.1 - Care Coordinator to Member Ratio
IPA Oversight- Annual UM Program Description	Annual	1/1-12/31	February 28, 2025	MA 25E2 - Utilization Management - Reporting Requirements	UM	IPACode_UM Program Description_2025	IPA Oversight / Year / Annual	FDR Oversight
IPA Oversight- Annual UM Work plan / Initial /HICE Report	Annual	1/1-12/31	February 28, 2025	MA 25E2 - Utilization Management - Reporting Requirements	UM	IPACode_Initial UM Workplan_ICE Report_2025	IPA Oversight / Year / Annual	FDR Oversight
IPA Oversight- Annual UM Program Evaluation	Annual	1/1-12/31	February 28, 2025	MA 25E2 - Utilization Management - Reporting Requirements	UM	IPACode_AnnualUM Program Evaluation_2025	IPA Oversight / Year / Annual	FDR Oversight



IPA Deliverable	Report Frequency	CY 2025 Reporting Period	IEHP Due Date	IEHP Policy Number (s)	Department(s)	File Naming Convention	SFTP Folder	Regulatory Measure(s)
IPA Oversight- Annual QM Program Description	Annual	2025	February 15, 2025	MA 25D1 - Quality Management Reporting Requirements	QM	IPACode_QM Program Description_2025	IPA Oversight / Year / Annual	FDR Oversight
IPA Oversight- Annual QM Work plan / Initial	Annual	2025	February 15, 2025	MA 25D1 - Quality Management Reporting Requirements	QM	IPACode_QM_Workplan_2025	IPA Oversight / Year / Annual	FDR Oversight
IPA Oversight- Annual QM Program Evaluation	Annual	2025	February 28, 2025	MA 25D1 - Quality Management Reporting Requirements	QM	IPACode_QM_Evaluation_2025	IPA Oversight / Year / Annual	FDR Oversight
Compliance- Annual Guidelines for Care Management Provider and Internal Staff Training Completion Records	Annual	1/1-12/31	February 28, 2025	MA 12A7 Coordination of Care	СМ	IPACode_Model_Care_Tmg_2025	IPA Oversight / Year / Annual	Guidelines for Care Management
IPA Oversight- Annual HCC Workplan	Annual	1/1-12/31	February 15, 2025	MA 21C – Medicare Risk Adjustment and Hierarchical Condition Categories (HCC)	HCI	IPACode_HCC_Workplan_2025	IPA Oversight / Year / Annual	FDR Oversight
Care Coordinator training for supporting self- direction under the demonstration	Annual	1/1-12/31	January 15, 2025	MA 21F - Medicare MMP Reporting Requirements - IEHP DualChoice Cal MediConnect Plan (Medicare - Medicaid Plan)	СМ	IPACode_Care_Coordinator_Trng_2025	IPA Oversight / Year / Annual	California-Specific Reporting - CA3.2 Organizational Structure & Staffing
Credentialing and Recredentialing- Written and Approved Credentialing, Recredentialing, Peer Review Policies and Procedures	Precontractual and Annual DOA	1/1-/12/31	As required for Precontractual Assessment and Annual DOA	MA 13G - Delegation Oversight Audit	Credentialing	IPA Name_Policy Name_MMDDYY	Audits / 2023 DOA Audit	FDR Oversight
Compliance Compliance Program policies and procedures	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 23B Compliance Reporting Requirements	Compliance	N/A	IPA Oversight / Compliance / Year	MMCM Chapter 21



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IPA Deliverable	Frequency	Reporting Period	IEHP Due Date	IEHP Policy Number (s)	Department(s)	File Naming Convention	SFTP Folder	Regulatory Measure(s)
Compliance- FWA Program policies and procedures	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24D Fraud, Waste, and Abuse Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 42, Part 422 and 423; Code of Federal Regulations, Title 42, §438.608 and §455.2; Federal False Claims Act, US Code, Title 31; Health & Safety Code §1348; Welfare & Institutions Code, §14043.1
Compliance- Sanction and Exclusion Screenings policies and procedures and evidence activity was conducted prior to hire and monthly thereafter.	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	MMCM Chapter 21
Compliance - Standars/Code of Conduct and evidence of distribution to New Hires and Annually thereafter	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 42 § 422.503(b)(4)(vi)(A)
Compliance - Copies of Compliance and FWA Trainings and evidence of completion records for New Hires and Annually thereafter.	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description MA 24D Fraud, Waste, and Abuse Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	MMCM Chapter 21
Compliance - Compliance Committee Meeting Minutes and Sign Ins	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 42 §438.608(a)(iii)
Compliance Organizational Chart	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	MMCM Chapter 21
Compliance - Annual Compliance Work Plan	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 42 §§ 422.503(b)(4)(vi)(F)and §§ 423.504(b)(4)(vi)(F)
Compliance - Annual Audit and Monitoring Plan	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 42 §§ 422.503(b)(4)(vi)(F)and §§ 423.504(b)(4)(vi)(F)



IPA Deliverable	Report Frequency	CY 2025 Reporting Period	IEHP Due Date	IEHP Policy Number (s)	Department(s)	File Naming Convention	SFTP Folder	Regulatory Measure(s)
Audit and Monitoring Universe Report	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 42 §§ 422.503(b)(4)(vi)(F)and §§ 423.504(b)(4)(vi)(F)
Compliance - Annual Risk Assessment Report	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 42 §§ 422.503(b)(4)(vi)(F)and §§ 423.504(b)(4)(vi)(F)
Compliance - Employee Universe including temporary, interns, volunteers and Governing Board	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 23B Compliance Reporting Requirements	Compliance	N/A	IPA Oversight / Compliance / Year	MMCM Chapter 21
Compliance - List of Downstream Entity/Subcontract ors	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 24E Compliance Program Description MA 24D Fraud, Waste, and Abuse Program Description	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 42 §§ 422.503(b)(4)(vi)(F)
Compliance- HIPAA Privacy Program policies and procedures	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 23B HIPAA Privacy and Security	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 45, Part 160, 162, and 164; U.S. Dept. of Health and Human Services (DHHS), section 13402(h)(2) of Public Law 111-5 (HITECH ACT).
Compliance - Copies of HIPAA Privacy Training and evidence of completion records for New Hires and Annually thereafter.	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA 23B Compliance Reporting Requirements	Compliance	N/A	IPA Oversight / Compliance / Year	MMCM Chapter 21
Compliance- Confidentiality Statement and evidence of completion records for New Hires and Annually thereafter.	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA_23B HIPAA Privacy and Security	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 45 §164.530(b)(1)



IPA Deliverable	Report Frequency	CY 2025 Reporting Period	IEHP Due Date	IEHP Policy Number (s)	Department(s)	File Naming Convention	SFTP Folder	Regulatory Measure(s)
Compliance- HIPAA Privacy Incident Universe Report	Annual	7/1/2024- 6/30/2025	As required for Precontractual Assessment and Annual DOA	MA_23B HIPAA Privacy and Security	Compliance	N/A	IPA Oversight / Compliance / Year	Code of Federal Regulations, Title 45 §164.530(i)(1) and §164.530(b)(1)
Annual Audited Financial Statements, Including IBNR Certification Financial Statements, Including IBNR Certification	Annual	Fiscal Year	5 Months after end of your IPA's Fiscal Year	MC 19A - Financial Viability	Financial Analysis	IPACode_Annual Financial Statement_2023	Financial Statements	California Code of Regulations: 1300.75.4.2
Current Profile, Contract and W-9 (to include any applicable attachment I, Practice Agreements, Standardized Procedures, Applicable Contract Addendums)	As needed	Not Applicable	As required for Initial Credentialing Applications	MC 25B10 - Credentialing Standards, Credentialing Quality Oversight of Delegates	Credentialing (CR)	IPA Code_Last Name, First Name_YYYY_MM_DD (YYYY_MM-DD = Date submitted to IEHP)	/Credentialing/ and Email to CredentialingProfileSubm ission@iehp.org	Per most current IEHP, NCQA, State and regulatory guidelines
Provider Submission via Excel Spreadsheet	As needed	Not Applicable	As required for Initial Credentialing Applications	MC 25B10 - Credentialing Standards, Credentialing Quality Oversight of Delegates	Credentialing (CR)	IPA_Code_Provider Profile Additions_YYYY_MM_DD (YYYY_MM-DD = Date submitted to IEHP)	/Credentialing/ and Email to CredentialingProfileSubm ission@iehp.org	Per most current IEHP, NCQA, State and regulatory guidelines
Written and approved Credentialing, Recredentialing, Peer Review Policies and Procedures	As needed	1/1-12/31	Within thirty (30) days following Credentialing Committee approval or prior to on-site and/or desktop audit	MA	Credentialing (CR)	N/A	IPA Oversight/Credentialing	Per most current IEHP, NCQA, State and regulatory guidelines