

Dental Managed Care Deliverables – Due Calendar Year (CY) 2023

Deliverable	Reference	Submission Guideline	Reporting Period	Due Date
ANNUAL (22)				
Annual Financial Statement (CPA Audited)	Exhibit A, Attachment 3.B	120 days after the end of the CY/FY	Access/Health Net: 01/01/22 – 12/31/22	05/01/23
			Liberty: 07/01/22 – 06/30/23	10/30/23
Annual Financial Statement (DMHC)	Exhibit A, Attachment 3.B.3	120 days after the end of the CY/FY	Access/Health Net: 01/01/22 – 12/31/22	05/01/23
			Liberty: 07/01/22 – 06/30/23	10/30/23
Annual Financial Statement (Medi-Cal Only)	APL 15-004; Exhibit A, Attachment 3.B.4	120 days after the end of the CY/FY	Access/Health Net: 01/01/22 – 12/31/22	05/01/23
			Liberty: 07/01/22 – 06/30/23	10/30/23
Annual Member Reminder	Exhibit A, Attachment 14.D.7	30 days after the beginning of the CY	01/01/23	01/31/23
Consumer Satisfaction Survey	APL 14-004; Exhibit A, Attachment 5.J.2	30 days after the end of the CY	01/01/22-12/31/22	01/30/23
Consumer Satisfaction Survey Methodology	APL 14-004; Exhibit A, Attachment 5.J.2	Methodology due 90 days prior to December 31 of each CY	01/01/23-12/31/23	10/02/23
EPSDT Policy & Procedure	APL 19-001; Exhibit A, Attachment 12.C	30 days after the beginning of the CY	01/01/2022 - 12/31/22	01/31/23
EQRO Performance Measure Audit (GMC & PHP)	APL 22-015; Exhibit A, Attachment 5.J.	120 days after the end of the CY	01/01/22 – 12/31/22	05/01/23

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Health Education Programs	APL 13-013; Exhibit A, Attachment 12.D.1	30 days after the beginning of the CY	01/01/23 – 12/31/23 (prospective)	01/31/23
Initial Screening Policy and Plan-Specific OHI Form	APL 18-007; Exhibit A, Attachment 13	30 days after the beginning of the CY and any changes within 10 Calendar Days	01/01/22-12/31/22	01/31/23
Key Personnel Disclosure Form	Exhibit A, Attachment 2.B	30 days after the beginning of the CY	01/01/22 - 12/31/22	01/31/23
Marketing Plan	APL 13-010; Exhibit A, Attachment 17.C.1	30 days after the beginning of the CY	01/01/23 – 12/31/23 (prospective)	01/31/23
Member Handbook (EOC)	APL 17-002; Exhibit A, Attachment 14.D.5	30 days after the beginning of the CY	01/01/23 – 12/31/23 (prospective)	01/31/23
Member Incentive Report	APL 18-009	Long term (more than 6 months): 60 days after the program start and annually on this anniversary date; Short term (6 months or less): 60 days after the program completion	As of 01/01/22	As Requested
Overpayment Recoveries	APL 22-003E; Exhibit E, Additional Provisions, 28.B.3	30 days after the end of the CY	01/01/22 – 12/31/22	01/30/23
Policy and Procedure for <i>detecting</i> Fraud, Waste and Abuse	APL 22-010	30 days after the end of the CY	01/01/22 – 12/31/22	01/30/23
Policy and Procedure for <i>reporting</i> Fraud, Waste and Abuse	APL 22-010	30 days after the end of the CY	01/01/22 – 12/31/22	01/30/23

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Program Integrity	APL 22-010; Exhibit E, Additional Provisions 21	30 days after the end of the CY	01/01/22 – 12/31/22	01/30/23
Quality Improvement Annual Report + Plan Accreditation	APL 18-002; Exhibit A, Attachment 5.I	30 days after the beginning of the CY	01/01/22 - 12/31/22	01/31/23
Time and Distance	APL 17-008; Exhibit A, Attachment 8.E	30 days after the beginning of the CY	As of 01/01/23	01/31/23
Transition of Care Policy	APL 17-011E; Exhibit A, Attachment 13.A	30 days after the beginning of the CY	01/01/23 – 12/31/23 (prospective)	01/31/23
Utilization Data Report	APL 13-006; Exhibit A, Attachment 7.D	30 days after the beginning of the CY	01/01/22 - 12/31/22	01/31/23
QUARTERLY (13)				
Call Center Report	APL 20-004; Exhibit A, Attachment 14.C	30 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	01/30/23 05/01/23 07/31/23 10/30/23 01/30/24
Case Management	APL 22-015; Exhibit A, Attachment 13.A	30 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	01/30/23 05/01/23 07/31/23 10/30/23 01/30/24

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Deliverable	Reference	Submission Guideline	Reporting Period	Due Date
Grievance & Appeal Report	APL 22-006; APL 20-003; APL 18-001; APL 17-012; Exhibit A, Attachment 15	45 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	02/14/23 05/15/23 08/14/23 11/14/23 02/14/24
Linguistic Services Report	APL 20-004; Exhibit A, Attachment 11.H	30 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	01/30/23 05/01/23 07/31/23 10/30/23 01/30/24
Performance Measures	APL 22-015; APL 22-002; APL 18-006; Exhibit A, Attachment 6	60 days after the end of the CY quarter (30 days contractually and an additional 30 days for administrative processing)	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	03/02/23 05/31/23 08/31/23 11/29/23 03/04/24
Prop 56 Directed Payments	APL 22-012	45 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	02/14/23 05/15/23 08/14/23 11/14/23 02/14/24

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Deliverable	Reference	Submission Guideline	Reporting Period	Due Date
Provider Monitoring Report	Exhibit A, Attachment 5.K.4	30 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	01/30/23 05/01/23 07/31/23 10/30/23 01/30/24
Provider Training	APL 13-014; Exhibit A, Attachment 9.E	30 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	01/30/23 05/01/23 07/31/23 10/30/23 01/30/24
QIP Reports	APL 18-002; Exhibit A, Attachment 5.H	30 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	01/30/23 05/01/23 07/31/23 10/30/23 01/30/24
Quarterly Financial Statement (DMHC)	APL 13-001; Exhibit A, Attachment 3.B.5	45 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	02/14/23 05/15/23 08/14/23 11/14/23 02/14/24
Quarterly Financial Statement (Medi-Cal Only)	APL 13-001; Exhibit A, Attachment 3.B.9	45 days after the end of the CY quarter	Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23	02/14/23 05/15/23

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Deliverable	Reference	Submission Guideline	Reporting Period	Due Date
			Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	08/14/23 11/14/23 02/14/24
Quality Improvement Committee Meeting Minutes	Exhibit A, Attachment 5.D	120 days after the end of the CY quarter	Q3: 07/01/22 – 09/30/22 Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	01/28/23 04/30/23 07/31/23 10/30/23 01/29/24 04/29/24
Timely Access and Specialty Referral Report	APL 18-003; Exhibit A, Attachment 11.B.2, 11.B.3,11.B.5	120 days after the end of the CY quarter	Q3: 07/01/22 – 09/30/22 Q4: 10/01/22 – 12/31/22 Q1: 01/01/23 – 03/31/23 Q2: 04/01/23 – 06/30/23 Q3: 07/01/23 – 09/30/23 Q4: 10/01/23 – 12/31/23	01/28/23 04/30/23 07/31/23 10/30/23 01/29/24 04/29/24
MONTHLY (7)				
274 File (and PDSRF)	APL 20-004; APL 19-004	Between the 1 st and 10 th day of the following month	December 2022 January 2023 February 2023 March 2023 April 2023 May 2023 June 2023 July 2023 August 2023	01/10/23 02/10/23 03/10/23 04/10/23 05/10/23 06/12/23 07/10/23 08/10/23 09/11/23

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			September 2023 October 2023 November 2023 December 2023	10/10/23 11/10/23 12/11/23 01/10/24
Encounter Data (and EDSRF)	APL 18-011; APL 15-007; Exhibit A, Attachment 4.B	15 days after the end of the month	December 2022 January 2023 February 2023 March 2023 April 2023 May 2023 June 2023 July 2023 August 2023 September 2023 October 2023 November 2023 December 2023	01/15/23 02/15/23 03/15/23 04/17/23 05/15/23 06/15/23 07/17/23 08/15/23 09/15/23 10/16/23 11/15/23 12/15/23 01/15/24
Member Phone Call Report	Exhibit A, Attachment 14.B.5	30 days after the end of the month	December 2022 January 2023 February 2023 March 2023 April 2023 May 2023 June 2023 July 2023 August 2023 September 2023 October 2023 November 2023	01/30/23 03/02/23 03/30/23 05/01/23 05/30/23 06/30/23 07/31/23 08/29/23 10/02/23 10/30/23 11/30/23 01/01/24

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			December 2023	01/30/24
Provider Directory	APL 22-015; APL 22-013; Exhibit A, Attachment 14.D.6.d	15 days after the end of the month	December 2022 January 2023 February 2023 March 2023 April 2023 May 2023 June 2023 July 2023 August 2023 September 2023 October 2023 November 2023 December 2023	01/15/23 02/15/23 03/15/23 04/17/23 05/15/23 06/15/23 07/17/23 08/15/23 09/15/23 10/16/23 11/15/23 12/15/23 01/15/24
[PNR] Plan Provider Network Report	APL 19-004; APL 17-010; APL 13-008; Exhibit A, Attachment 8.G; Exhibit A, Attachment 8.H; Exhibit A, Attachment 10.F	15 days after the end of the month	December 2022 January 2023 February 2023 March 2023 April 2023 May 2023 June 2023 July 2023 August 2023 September 2023 October 2023 November 2023 December 2023	01/15/23 02/15/23 03/15/23 04/17/23 05/15/23 06/15/23 07/17/23 08/15/23 09/15/23 10/16/23 11/15/23 12/15/23 01/15/24

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Self-Reported Monthly Utilization Data (PCD)	APL 22-015; APL 13-006; Exhibit A, Attachment 7.D	60 days after the end of the month	November 2022	01/29/23
			December 2022	03/01/23
			January 2023	04/03/23
			February 2023	05/01/23
			March 2023	05/30/23
			April 2023	06/29/23
			May 2023	07/31/23
			June 2023	08/29/23
			July 2023	09/28/23
			August 2023	10/30/23
			September 2023	11/29/23
			October 2023	01/02/24
			November 2023	01/29/24
December 2023	02/29/24			
[TAR] Treatment Authorization Request Submission	APL 22-006; APL 20-004	30 days after the end of the month	December 2022	01/30/23
			January 2023	03/02/23
			February 2023	03/30/23
			March 2023	05/01/23
			April 2023	05/30/23
			May 2023	06/30/23
			June 2023	07/31/23
			July 2023	08/29/23
			August 2023	10/02/23
			September 2023	10/30/23
			October 2023	11/30/23
			November 2023	01/01/24
			December 2023	01/30/24