

Bureau of Managed Care
Contractor Policy/Procedures SharePoint Tracking and Monitoring Policy

General Contract Monitoring/Compliance:

The Department's Managed Care Program Contractors (MCOs and MPCEO) are responsible for the successful, accurate, complete, and timely submission of reports, forms, certifications, and attestations (deliverables) required under the Managed Care Administrative Deliverables SharePoint Site Libraries. There are five separate and unique Libraries in the Managed Care Administrative Deliverables SharePoint System:

- HealthChoice Illinois (HCI)
- YouthCare
- Medicare Medicaid Alignment Initiative (MMAI)
- Fully Integrated Dual Eligible Special Needs Plans (FIDE-SNP or D-SNP)
- Illinois Medical Preventative Care and Education Organization Services (MPCEO)

General Requirements:

The Contractors shall submit the required deliverables via the SharePoint site that are contractually required under the Managed Care Program Contract(s) for compliance and as identified (ad hoc) by the Department.

- All instructions for the use of the SharePoint site are published on the Managed Care Administrative Deliverables SharePoint Libraries page under "HFS Forms and Templates".
- The deliverables required to be submitted by each Contractor, and by Managed Care Program Contract, are detailed on the Administrative Deliverables Site Page for each Managed Care Program - HCI, YouthCare, MMAI, D-SNP, and MPCEO.
 - Contractors that are participating in more than one Managed Care Program, shall prepare and submit required SharePoint materials that are specific to each Managed Care Program. The Contractor shall not complete one form and combine data for all managed care programs under one form when submitting materials into SharePoint.
- The Contractors shall apply the Administrative Deliverables Summary document posted in each Managed Care Program SharePoint Library when preparing and submitting required deliverables.
 - The Administrative Deliverables Summary posted in each Managed Care Program SharePoint Library details the report submission requirements, report frequency, submission due dates and naming convention requirements.
 - If a report submission due date falls on a weekend (Saturday or Sunday) or State Holiday as defined under Contract, the Department will adjust the report due date to the next business day.
 - Naming conventions submitted by the Contractor shall reflect the correct reporting details and reporting period – month, quarter, calendar year or state fiscal year. If the naming convention does not reflect the correct information or is unclear, the report will be rejected in the system.

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- The Contractor shall NOT alter any reporting templates provided by the Department. If a Contractor SharePoint user experiences a problem with a template, they shall notify (email) the designated Department SharePoint Contact and copy their designated Bureau of Managed Care (BMC) Account Manager.
 - Contractors shall not repurpose previously submitted templates/deliverables. The Contractor shall apply a new template to each reporting period.
- The Contractor's designated SharePoint users (staff) must regularly upload/submit timely and correctly, the required deliverables in compliance with the Administrative Deliverables Site Library.
 - When submitting deliverables, the Contractor's designated SharePoint users shall ensure that reports are "Checked In" after uploading or viewing. If a report is not "Checked In", the report has not been fully and completely submitted and is considered pending with the Contractor. Timely submission of SharePoint materials is based on the date and time of the "Checked In" action performed by the Contractor SharePoint user.
 - If a report cannot be submitted by the submission due date, a Contractor may request an extension prior to the due date by emailing their designated BMC Account Manager and cc: the BMC SharePoint Contact. Any requests for extension must include the reason for the late submission or delayed response and clarify why this is an extenuating situation. The BMC Account Manager will review and approve or deny the request.
 - If a Contractor SharePoint user uploads a deliverable in error or a duplicate is uploaded, the Contractor SharePoint user must notify the designated BMC SharePoint Contact to request that the incorrect or duplicate document be deleted.
- Contractor's staff must regularly and frequently monitor the SharePoint site for any Rejected or Discrepancies Found error messages for each report submission. Contractors have 24 hours (1) business day to correct and resubmit "rejected" reports; Contractors must respond to, correct, and resubmit Discrepancy Found reports within (5) business days. Contractor error report resubmissions must be submitted via the SharePoint site and will not be accepted by email.
 - Should a Contractor need to submit a revised report based on an error message received, the Contractor SharePoint user shall name the replacement (Corrected) report exactly the same, upload/replace the original report, and click on "Resubmit" in the "Submission Status" field. The Contractor SharePoint user must **NOT** upload separate revised versions of the report.
 - SharePoint system generated email approvals only indicate that the report was submitted timely and in compliance with reporting submission rules. They should not be considered final Department approval.

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Failure of the Contractor to submit deliverables in compliance with the requirements of the SharePoint Administrative Deliverables Site, including but not limited to the requirements of the Managed Care Program Contract(s), may result in the Department issuing sanctions to the Contractor, including monetary penalties as provided in each Managed Care Program Contract.

Contractor SharePoint User Access and Termination Requests:

- Contractors must request access to the SharePoint site for each end users. Access to the SharePoint Site must be initiated by the Contractor via an email to the BMC SharePoint contact. When requesting access, the Contractor must provide the full name of the end user, a good phone number and email address for the end user, justification to support the reason for the access request, and the end users working title.
- Contractors are required to notify the Department when an end user no longer requires access to the SharePoint Site or is no longer employed by the Contractor. The Contractor must submit an email notification to the BMC SharePoint Contact and cc: their designated BMC Account Manager upon determination that the end user no longer requires access to the Share Point Site, and specific Libraries (HCI, YouthCare, MMAI, D-SNP and/or MPCEO). The notice submitted to the Department must also include the effective date of the termination for access to the SharePoint Site.
- Contractors shall immediately report any technical issues with SharePoint (except passwords) to the BMC SharePoint Contacts and cc: their designated BMC Account Manager. Contractors shall attach a screenshot showing the problem or error message or a detailed description of the issue within their report to the Department.
- Should a Contractor end user need to reset their SharePoint password, the end user must call the DOIT Identity Management team either through the Identity Management website, or via telephone:
 - <https://www2.illinois.gov/sites/doit/support/Pages/DoITIdentityManagement.aspx>
 - Springfield – 217-524-DOIT (217-524-3648)
 - Chicago – 312-814-DOIT (312-814-3648)

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**Policy History
General Contract Monitoring**

Date:	Action:	Policy Originator
March 2021	SharePoint Use and Access	BMC
December 2022	Updates	Amy Roberts
March 2025	Updates	Jeremy Reeves and Amy Roberts
October 2025	Updates	Amy Roberts and Adam Lewis

Policy Revisions	Revision Approved
August 2021	Laura Ray, Bureau Chief
January 2023	Laura Ray, Bureau Chief
October 2025	Keshonna Lones, Bureau Chief