

HEDIS Task Planning, Quarter by Quarter

Tegria

Success with the Healthcare Effectiveness Data and Information Set (HEDIS®) requires careful planning and year-round attention. By aligning your team's efforts with the natural rhythm of the HEDIS calendar, you'll be better positioned to meet reporting deadlines, avoid costly rework, and drive year-over-year improvement. Use this quarter-by-quarter guide to stay organized, align with NCQA deadlines, and keep your value-based care efforts on track.

Q1: JANUARY–MARCH

Goal: Prepare Systems, Teams, and Data for the HEDIS Reporting Cycle.

☐ **Validate Claim Mappings**

Validate coding accuracy (e.g., ICD-10, CPT, LOINC) used in measure calculations. Ensure accuracy of mappings from claims to HEDIS measures before loading data into the IDSS.

☐ **Optimize Patient Attribution Logic**

Confirm patients are accurately assigned to providers and care teams to reflect responsibility for care and are aligned with payer or internal attribution models.

☐ **Audit + Correct Care Gap Data**

Run mock reports to identify data quality issues such as missing screenings, immunizations, or lab results, then coordinate remediation with clinical teams.

☐ **Assess External + Clinical Data Sources**

Confirm that EHR, HIE, registry, laboratory, pharmacy, case-management, and other data sources meet the requirements of the applicable traditional or ECDS reporting method.

☐ **Develop a Submission Project Plan + Timeline**

Align internal teams and vendors on deliverables, milestones, and submission responsibilities. Build in time for dry runs and audit remediation.

☐ **Review NCQA Technical Updates**

Review the March technical update, revised value sets, medication lists, risk-adjustment tables, audit guidance, and final measure-retirement decisions. Revalidate affected measure logic and data mappings.

Q2: APRIL–JUNE

Goal: Finalize Data, Complete Audit Review, Apply Plan Lock, and Prepare for NCQA Submission.

☐ **Conduct Internal Audit Readiness Reviews**

Assess documentation, processes, and data submission capabilities before the plan lock and final audits.

☐ **Engage Auditors + Finalize Medical Record Review (MRR)**

For measures that permit hybrid reporting, ensure abstraction is complete and fully documented. Respond to auditor queries quickly to avoid delays in Plan Lock or submission.

☐ **Submit + Validate HEDIS Data**

Work with auditors to complete final submissions and attestation of results. Visit [ncqa.org](https://www.ncqa.org) for data submission timelines.



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Q3: JULY–SEPTEMBER

Goal: Reflect, Retool, and Review Measure Updates.

- ☐ **Review Final Audit Reports + Identify Improvement Areas**
Analyze auditor feedback and submission outcomes to plan performance improvement.
- ☐ **Update HEDIS Reporting Periods + Measure Versions**
Implement NCQA's updated specifications released in early August to prepare systems for next year's cycle.
- ☐ **Benchmark + Trend Performance**
Compare year-over-year measure trends, identify systemic documentation or coding issues, and evaluate alignment with value-based care goals.

Q4: OCTOBER–DECEMBER

Goal: Plan Ahead and Educate Staff.

- ☐ **Identify Training Gaps + Educate Staff on HEDIS Changes**
Conduct education and training based on upcoming measure updates or performance shortfalls.
- ☐ **Review Payer Contracts + Value-Based Agreements**
Reassess contracts to understand HEDIS expectations and financial implications.
- ☐ **Pre-Load Test Data (if Feasible)**
Prepare systems to run early test extracts or mock submissions to identify data completeness or logic translation issues.
- ☐ **Advance Digital HEDIS Readiness**
Assess FHIR and CQL capabilities, structured clinical-data availability, EHR and HIE connectivity, data quality, source-data validation, and readiness for parallel digital reporting.

HEDIS is moving to fully digital quality measurement by MY 2030, so Tegria recommends developing a plan to reduce dependence on manual record review before the Hybrid method is eliminated in MY 2029.

Stay proactive, not reactive.

Use this quarterly guide as a roadmap to keep your organization on track and moving forward.

Tegria



Need help navigating
HEDIS or optimizing your
value-based care strategy?
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