

## PERM Meetings - Everything You Need to Know!

Title	Host	Frequency	Purpose	Target Audience
<b>Pre-cycle</b>				
Cycle Kick Off Meetings - Centers for Medicare & Medicaid Services (CMS), Eligibility Review Contractor (ERC), Review Contractor (RC), Statistical Contractor (SC)	CMS, ERC, RC, SC	One time - all states	These meetings will provide an overview of the PERM program; describe the general process for the Medicaid and/or CHIP measurements; introduce key personnel from CMS and the other PERM contractor(s); and identify the working relationships among the parties.	State Medicaid/CHIP PERM Project Managers/Liaisons, Data Leads, Medical Records Request (MRR) Contacts, Medical Review (MR) Contacts, Eligibility Review (ER) Contacts, Data Processing (DP) Contacts, Policy Subject Matter Experts (SMEs), Information Technology (IT) Security/System Access SMEs.
Data Submissions Instruction Meetings (PERM + and Routine PERM)	SC	One time	These meetings provide an overview to states about the data submission process and responsibilities for both Routine PERM and PERM Plus states.	All state PERM staff
Division of Financial Operations (DFO) Kick-Off Calls	SC	One time	This is a meeting with the DFOs for the cycle states to provide an overview of the PERM process and ask questions related to their states' 64/21 forms submitted, any unusual/new state programs, and any staffing challenges/submission delays typically experienced each quarter.	DFO staff assigned to states in the cycle
Eligibility Intake Meetings	ERC	One time per state	This meeting will review the policy survey, discuss the case documentation needed to conduct reviews, determine a clear process and timelines for providing the ERC with eligibility system access	Main PERM state contacts and subject mater experts in Medicaid and CHIP eligibility categories, policies and processes, and eligibility system technical assistance.
General Education Webinar (PERM 101)	ERC, RC, SC	Three sessions conducted but states only need to attend one	This call will provide states with a PERM overview, contractor and state roles and responsibilities, process details, best practices, and contact information.	State Medicaid/CHIP PERM Project Managers/Liaisons, Data Leads, MRR Contacts, MR Contacts, ER Contacts, DP Contacts, Policy SMEs, IT Security/System Access SMEs.
Review Contractor (RC) Medical Record Request (MRR)/Medical Review (MR) Policy Questionnaire Webinar	RC	One time per state if needed	This meeting discusses the state's responses on the MRR/MR Policy Questionnaire. Only held if the follow-up to the questionnaire is required by the RC or state or requested by the state.	State Medicaid/CHIP PERM Project Managers/Liaisons, MRR Contacts, MR Contacts, Policy SMEs.
Review Contractor (RC) Data Processing (DP) State Systems Access Webinar	RC	One time per state if needed	This meeting discusses the state's responses on the DP State Systems Access Questionnaire. Only held if the follow-up to the questionnaire is required by the RC or state or requested by the state.	State Medicaid/CHIP PERM Project Managers/Liaisons, DP Contacts, IT Security/System Access SMEs.

Review Contractor (RC) Data Processing (DP) Questionnaire & Risk-Based Screening (RBS) Assessment Webinar	RC	One time per state	This meeting discusses the state's responses on the DP Questionnaire and RBS Assessment.	State Medicaid/CHIP PERM Project Managers/Liaisons, Claims System Processing SMEs, DP Contacts, Policy SMEs.
Review Contractor (RC) Data Processing (DP) Orientation	RC	Three sessions conducted but states only need to attend one	This webinar will prepare states for the DP review of the sampled claims.	State Medicaid/CHIP PERM Project Managers/Liaisons, DP Contacts, Policy SMEs.
Review Contractor (RC) Medical Record Request (MRR)/Medical Review (MR) Orientation	RC	Three sessions conducted but states only need to attend one	This webinar will prepare states for MRR and MR of the sampled claims.	State Medicaid/CHIP PERM Project Managers/Liaisons, MRR Contacts, MR Contacts, Policy SMEs.
Review Contractor (RC) State Medicaid Error Rate Findings (SMERF) Orientation	RC	Three sessions conducted but states only need to attend one	This webinar will prepare states for utilizing the SMERF system to track claims review throughout the PERM cycle.	State Medicaid/CHIP PERM Project Managers/Liaisons, MRR Contacts, MR Contacts, ER Contacts, DP Contacts, Policy SMEs, State SMERF Users.
State Intake Meetings	SC	One time	This meeting provides a tutorial on programming PERM universe data extraction, outline state requirements (data quality requirements, etc.), highlight any common problems states encounter, and suggest best practices for states to follow. The SC will also engage in an in-depth intake discussion with the state covering program structures, data sources, payment methodologies, structure and development of financial report forms, an in-depth review of data elements, how the state attributes third party liability and patient liability, what changes the state will make to the suggested file layouts, and the answers to any state questions to prepare for data submission. The SC shall use the intake calls to confirm information gathered from the SC's initial research of each state and appropriately craft questions to obtain other required information with minimal burden to the states.	State lead, state policy and technical staff members who will extract and compile details data from state payment systems (e.g. MMIS), and vendors who will be extracting or submitting data.
State 64/21 Intake Meetings	SC	One time	These meeting will provide an overview of the 64/21 reconciliation process that occurs during the PERM cycle. States will be asked to complete a question set to provide more information about their 64/21 process and forms submitted.	State lead and state financial staff
<b>Intra-cycle</b>				

Ad hoc calls	SC	As needed	These calls are held with states not on a weekly/biweekly meeting schedule to discuss claims, sample, or detail issues.	State lead and data lead. Other attendees may be needed for specific meetings. This will be communicated to states ahead of the call.
Cycle Calls	CMS, ERC, RC, SC	Once per month	These meetings will provide updates to the states on the current status of the cycle.	State Medicaid/CHIP PERM Project Managers/Liaisons, Data Leads, MRR Contacts, MR Contacts, ER Contacts, DP Contacts, Policy SMEs, IT Security/System Access SMEs.
Details Intake Meetings	SC	One time	To provide an overview of the details requirements, collect any additional information from the state that will support the SC review of the details submission (i.e., identification of required data fields that are not maintained in the state's data system), and provide states with an opportunity to ask questions about required fields and the details process.	State lead, state policy and technical staff members who will extract and compile details data from state payment systems (e.g. MMIS), and vendors who will be extracting or submitting data.
Eligibility Review Contractor Bi-Weekly Check Ins	ERC	Every other week	This meeting will update states on eligibility review progress, discuss questions related to applying state policy to case reviews, and present findings.	Main PERM state contacts, including eligibility points of contacts, subject matter experts in Medicaid and CHIP eligibility categories, policies, and procedures as well as eligibility system technical assistance, quality control, and financial staff as needed for targeted discussions.
Review Contractor (RC) Difference Resolution (DR)/Appeals Training	RC	Three sessions conducted but states only need to attend one	This webinar will prepare states for filing DRs and Appeals on DP, MR, and eligibility review (ER) error findings during the PERM review process.	State Medicaid/CHIP PERM Project Managers/Liaisons, MRR Contacts, MR Contacts, ER Contacts, DP Contacts, Policy SMEs, State SMERF Users.
State/Review Contractor (RC) Bi-Weekly Check-In Call	RC	Every other week	This call will provide updates to the states on DP and MR progress, MRR contacts and status, discuss questions related to applying state and federal regulations and policies to case reviews, and respond to questions and concerns presented by the state.	State Medicaid/CHIP PERM Project Managers/Liaisons, Claims System Processing SMEs, MRR Contacts, MR Contacts, ER Contacts, DP Contacts, Policy SMEs, IT Security/System Access SMEs. Attendance determined based on bi-weekly agenda.

Universe Build/Payment Level Meetings	SC	One time	The SC will host different meetings for each submission methodology: PERM+: Discussion of how the state's sampling universe will be created from the quarterly data submissions and the timeline for state approval of the build Routine PERM: Discussion of the payment level for different claims types; identification of fixed/aggregate payments, and waiver claims; and identification of any claims the SC needs to remove prior to sampling.	State lead, state policy and technical staff members who will extract and compile details data from state payment systems (e.g. MMIS), and vendors who will be extracting or submitting data.
Weekly/Bi-Weekly Check Ins	SC	Each week or every other week	These meetings provide extra support to states that experience delays/issues with data submission	State lead and data lead. Other attendees may be needed for specific meetings. This will be communicated to states ahead of the call.
64/21 Reconciliation Calls	SC	As needed	These calls discuss 64/21 differences for states above allowable thresholds (15% per quarter and 5% overall). These calls will be held as needed until the differences are resolved.	State lead and state financial staff
<b>Post-cycle</b>				
Systems Workgroup Meeting	CMS	One time	This meeting is a discussion of significant data issues experienced during the previous cycle along with suggestions for mitigating those issues in the next cycle.	State lead, state policy and technical staff members who will extract and compile details data from state payment systems (e.g. MMIS)