



# State Medicaid Error Rate Findings (SMERF) System Overview RY26



**Empower, AI**

**Payment Error Rate  
Measurement (PERM)  
Review Contractor (RC)**

**February 2025**

# Agenda

- Introduction to SMERF and its role in PERM.
- Discuss SMERF access for state users.
- Walk through the SMERF log-on process.
- Review the relevant tabs on the SMERF home page.
- Describe SMERF workflows and related PERM alert emails.
- Demonstrate reporting and monitoring tools.
- Review module for individual state policies, medical record requests (MRR), medical review (MR), data processing (DP) review, and eligibility review (ER) findings.

# Key Learning Objectives

After completing this course users should be able to:

- Describe the role SMERF plays in PERM.
- Obtain access and log in to SMERF.
- Navigate menus to find individual claims, MRR, errors, policies, reports, and tools.

# Introduction to SMERF

- The SMERF system is a web-based application used for tracking and reporting improper payments in the PERM program.
- The Centers for Medicare and Medicaid Services (CMS), Statistical Contractor (SC), RC, Eligibility Review Contractor (ERC), and state users regularly use the SMERF system.
- The SMERF system is an integral part of the PERM process. The PERM RC maintains the SMERF State User Guide to provide state PERM users with instructions on how to use the features available to the state in the SMERF system effectively. The PERM RC updates this manual when it makes significant changes or upgrades to the SMERF system.

# Overview of SMERF

- Access to the SMERF system allows the state to do the following:
  - Track DP, MR, and ER findings.
  - Track pending ER and DP reviews and receive automated notices via PERM alert emails for pending information needed to complete reviews.
  - Monitor and track MRRs.
  - Download reports.
  - Access state policies.
  - Request difference resolutions (DRs) and appeals.
  - Access Final Errors For Recovery (FEFR) reports.
- CMS uses SMERF to oversee the progress of the PERM RC and ERC review process and complete state appeal requests.

# Getting Started / Logging in



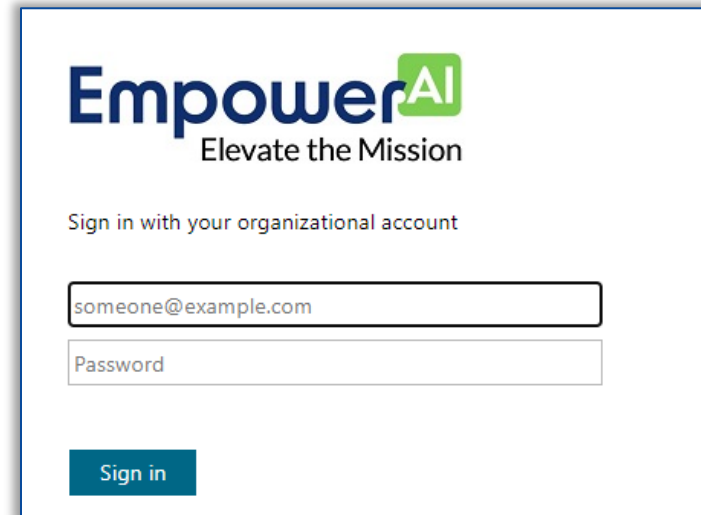
# Getting Started

- SMERF system access requires a computer, internet access, and a username and password. The username and password are supplied by the RC.
- Send an email to [SMERFaccounts@empower.ai](mailto:SMERFaccounts@empower.ai) to request SMERF access.
- To obtain a username and password for SMERF access, each user must first read the Rules of Behavior provided by the RC, complete, sign (electronic signatures are acceptable), and return the system access forms back to the RC.
- Upon receipt of completed system access forms, the RC will establish individual SMERF accounts for state users.
- Once the RC has emailed the SMERF **Username** and **Password**, use the following URL to access SMERF:  
<https://smerf.permrc.cms.gov/>
- Enter your **Username** in the format [username@admedcorp.com](mailto:username@admedcorp.com).
- Access is limited to state PERM representatives, PERM contractors, and CMS.

**Note:** Due to a series of name changes for the PERM RC, users will see different naming structures in SMERF usernames and the website, including admedcorp.com, nciinc.com, and empower.ai.

# Initial Login

- You will be required to change your password as a result of the initial successful login. The password requirements are as follows:
  - Minimum Length: 9+ character(s).
  - Including 1 character from 3 of the below categories:
    - An uppercase alphabetic character.
    - A lowercase alphabetic character.
    - A numeric character, (e.g., 1, 2, 3).
    - A special character, (e.g., !, #, \$, %).
- Other important facts:
  - Passwords expire every 60 day(s).
  - You can only change your password once every 24 hours.
  - You cannot reuse the last 24 passwords.



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Elevate the Mission

Sign in with your organizational account

someone@example.com

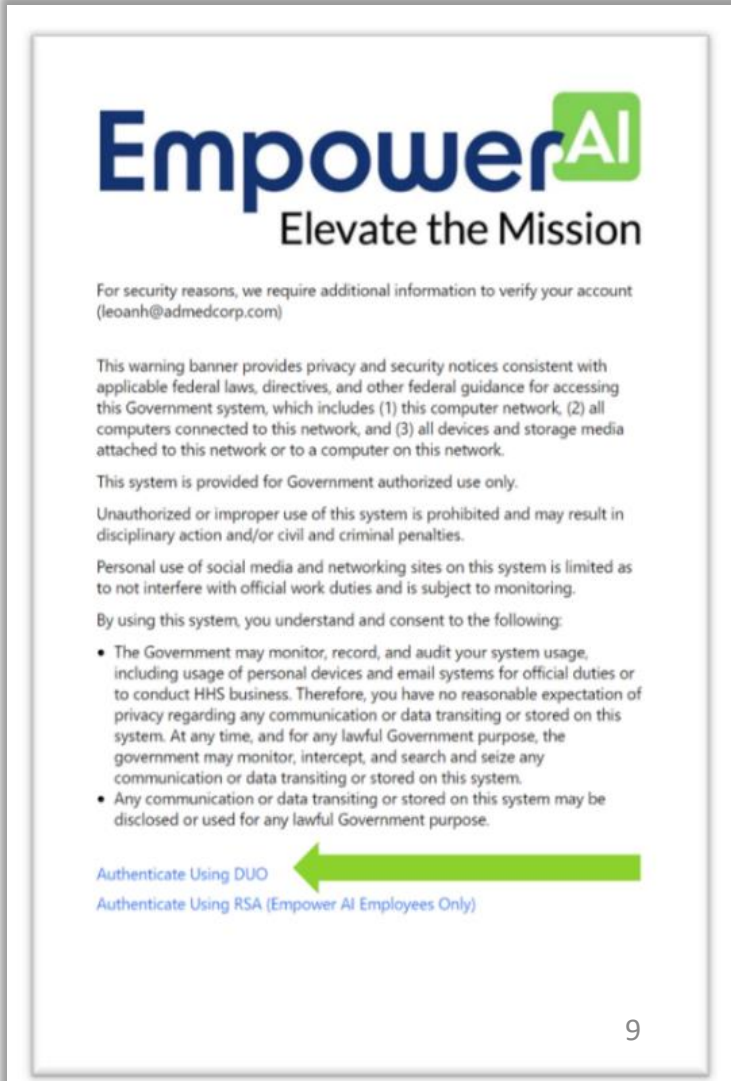
Password

Sign in



# Two Factor Authentication

- DUO is the RC's two factor authentication solution. After password change, the following steps should be followed:
  1. The DUO Welcome screen will appear. Click "Authenticate Using DUO".



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For security reasons, we require additional information to verify your account (leoanh@admedcorp.com)

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network.

This system is provided for Government authorized use only.

Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

- The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this system.
- Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose.

[Authenticate Using DUO](#) ←

[Authenticate Using RSA \(Empower AI Employees Only\)](#)

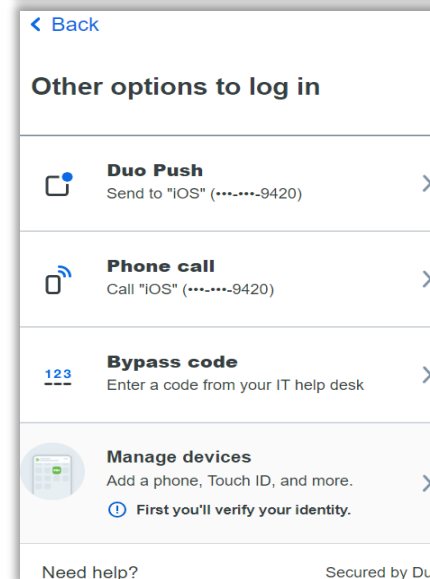
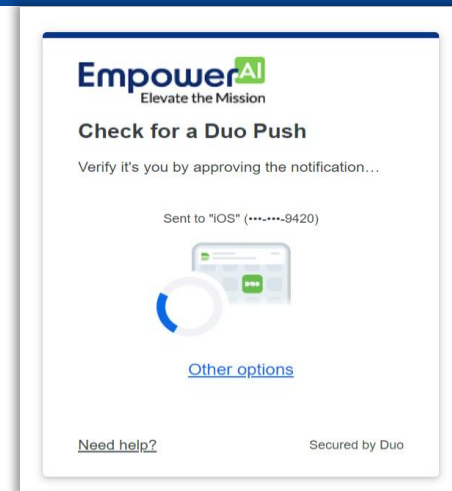
9

# Two Factor Authentication Continued

2. You will be redirected to the DUO application to begin verification. If you do not want to use the method DUO automatically suggests, click “Other options”. Then select the method you want from the list.

Selecting “Other options” will take you to a list of all your available DUO authentication options. Click on the one you want to use and follow the instructions shown.

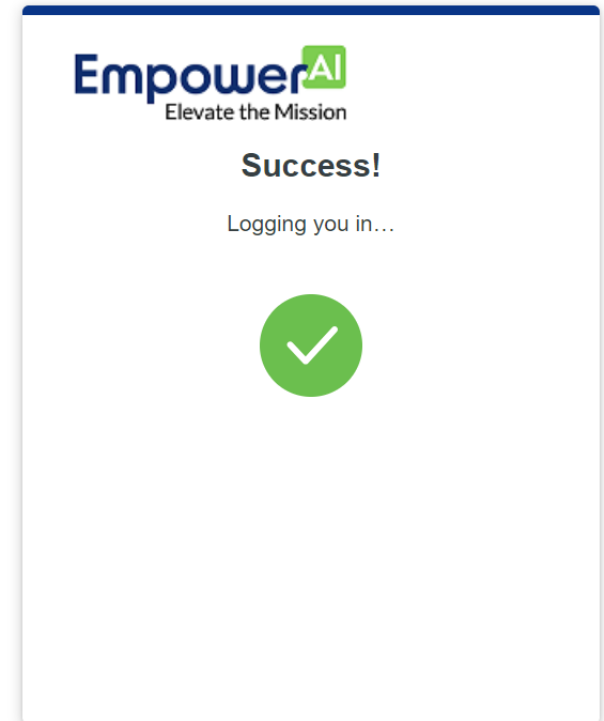
“Manage devices” will allow you to add or edit the current devices you have set up with DUO.



# Two Factor Authentication Successful

3. Once verification is successful you will be directed into your application.

- SMERF Assistance
  - If you are experiencing any issues, please try clearing your cache in the browser. If you are using a bookmark, **please ensure there are no additional characters in the URL you are accessing.**
  - If you cannot authenticate (DUO), please reach out to [smerfaccounts@empower.ai](mailto:smerfaccounts@empower.ai) or contact PERM Customer Service at 1-800-393-3068.



# Successful State Login Home Page

- The SMERF Home Page includes contact information for PERM RC staff, as well as links to the SMERF State User Guides and other PERM websites. The menu of options are listed across the top of the screen.

## Payment Error Rate Measurement (PERM) Project

Welcome **HEATHER ENGSTROM** Organization: State of California [[Log Off](#)]  
Session expires in: 15 minutes

[HOME](#) [MEDICAL RECORDS REQUESTS](#) [ERRORS](#) [REPORTS](#) [ADMIN](#) [CLAIMS](#) [CONTACTS](#) [RECOVERIES](#) [TOOLS](#)

### State Medicaid Error Rate Finding (SMERF) System

SMERF provides the status of reviews and findings for claims sampled under the Payment Error Rate Measurement (PERM) program. State users can obtain the status of ongoing record requests and medical and data processing reviews. Once a review is complete, States may access SMERF to appeal the finding(s). Please refer to the SMERF State User Guide for more information.

[RY22 SMERF State User Guide](#)

#### PERM RC Review Year specific questions:

Please refer any questions about the PERM RC RY 2024 Contract to the e-mail address: [PERMRC\\_2024@empower.ai](mailto:PERMRC_2024@empower.ai)

Please refer any questions about the PERM RC RY 2025 Contract to the e-mail address: [PERMRC\\_2025@empower.ai](mailto:PERMRC_2025@empower.ai)

Please refer any questions about the PERM RC RY 2026 Contract to the e-mail address: [PERMRC\\_2026@empower.ai](mailto:PERMRC_2026@empower.ai)

#### Review Contractor Contacts:

Role	Name	Phone #	Email
Project Director	Chad Landtroop	615-692-2238	<a href="mailto:landtroc@empower.ai">landtroc@empower.ai</a>
Assistant Project Director	Melissa Rinehart	614-746-2059	<a href="mailto:rineharm@empower.ai">rineharm@empower.ai</a>
Cycle Manager	John Louallen	615-829-4370	<a href="mailto:louallej@empower.ai">louallej@empower.ai</a>
Cycle Manager	Alexis Gee	602-228-5395	<a href="mailto:GeeA@empower.ai">GeeA@empower.ai</a>
Cycle Manager	Cortney Wernick	307-421-6254	<a href="mailto:cwernick@empower.ai">cwernick@empower.ai</a>

### Links

- [CMS PERM Website](#)
- [Payment Accuracy.Gov](#)
- [National Association of Medicaid Directors \(NAMD\)](#)
- [HHS Agency Financial Report](#)
- [CMS Chief Financial Officer Report](#)

# SMERF Review Workflow



# Review Workflow in SMERF

- Understanding the workflows of reviews in SMERF will help the state users understand how to best use the various features in SMERF including PERM alerts, reports, etc.
- State PERM representatives designate which state users receive PERM alerts.
- To request access or update the role of a state user, please send requests to [SMERFaccounts@empower.ai](mailto:SMERFaccounts@empower.ai).

# Review Workflow in SMERF, continued

- The SC sends the sample claims data files, and the details claims data files to the RC which are then loaded into SMERF.
- These files become the basis of reviews for the ERC and the RC.
- ER begins when the ERC receives the sample claims data files from the SC.
- DP reviews and MRR outreach begin when the RC receives the details claim data files from the SC.
- MR begins when the RC receives requested records from providers.
- During DP reviews and ER, the review is pended if additional information is needed from the state. Pended reviews are found on the DP pending P1 list and the ER EP1 list in SMERF.
  - We will cover creating these reports more closely in the Reports section of this training.

# Review Workflow in SMERF, continued 2

- If an error is cited, states will receive an Advance Notice of Error PERM alert, except for errors that are cited the day before the Sampling Unit Disposition (SUD) runs. Errors cited the day before the SUD will not generate an Advance Error Notice.
  - The Advance Error Notice list is also available in SMERF.
  - SUD reports publish on 15<sup>th</sup> and 30<sup>th</sup> of each month with findings of completed reviews.
- DR requests can only be filed in SMERF within 25 business days after the error is published on the SUD. Business days exclude weekends and federal holidays.
  - States receive a PERM alert email when a DR decision is posted to SMERF.
- Appeals can only be filed in SMERF within 15 business days from the date the contractor posted its DR decision.
  - States receive a PERM alert email when an appeal decision is posted to SMERF.



# Review Workflow in SMERF – PERM Alert Email Example

- The below image contains an example of a PERM alert email sent to the state.

Data Processing Pending P1 Information Notification



permalerts@nciinc.com

To  
Cc



If there are problems with how this message is displayed, click here to view it in a web browser.

Dear SMERF State User

The purpose of this email is to notify you that the Review Contractor (RC) has requested additional information for claims currently under review.

Please access the State Medicaid Error Rate Findings (SMERF) system at <https://smerf.permrc.cms.gov> for more information.

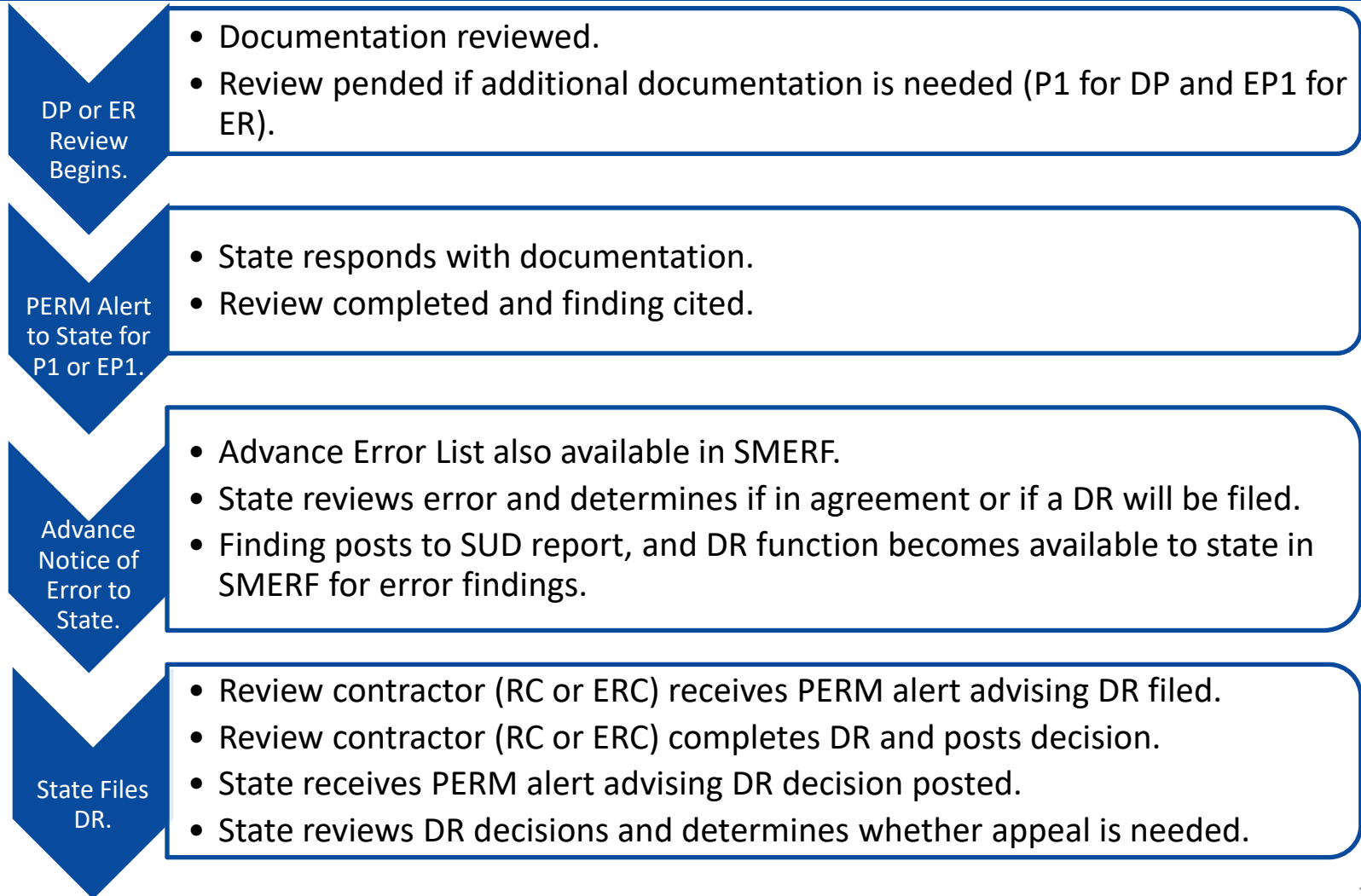
If you have any difficulties accessing the system, please contact Empower AI at 1-800-393-3068 during support hours of 8AM – 8PM M-F.

**Please note: This e-mail message was sent from a notification-only address that cannot accept incoming e-mail. Please do not reply to this message.**

**Name of Report: Pending P1 Information Notification**

PERM ID	Start Date	Date Added	Reviewer ID	Due Date	Aging Group
	12/18/2023	01/09/2024		01/26/2024	0-14
	12/15/2023	01/09/2024		01/26/2024	0-14
	12/17/2023	01/09/2024		01/26/2024	0-14

# Example Review Workflow with PERM Alert



# SMERF Home Page and Menu Tabs



# Tools - State Educational Resources Page

- An important tab on the SMERF Home page is the State User Educational Resources which provides useful information from the contractors.
- From the SMERF Home page, state users click on State User Educational Resources under the Tools menu to access.
- This page includes links to the SMERF User Guide, the RC's Fast Facts guides, the SC Fast Facts guide, the ERC's Fact Sheets, a PERM acronym list, and other useful resources.
- The RC will continue to take a proactive approach to add links for resources that may be helpful to states.
- We welcome your suggestions on additional resources you would like added.

# Tools - State Educational Resources Page, continued



A horizontal navigation menu with a white background and a dark blue border. The menu contains the following items: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'TOOLS' item is highlighted with a red rectangular border.

- Access the State Educational Resources page by selecting Tools from the main menu as shown above.
- The images on the next slide shows the current list of resource documents available to states in SMERF.
- Resource document categories available include the following:
  - State User Guides.
  - SMERF Overviews.
  - RC (Empower AI) Resources.
  - ERC (BAH) Resources.
  - SC (The Lewin Group) Resources.
  - Other Resources.

# Tools - State Educational Resources Page, continued 2

## State User Educational Resources

### State User Guides

- [RY22 SMERF State User Guide](#)

### SMERF Overviews

- [State SMERF Overview](#)

### Review Contractor (Empower.AI) Resources

- [Accessing the SUD Report in SMERF](#)
- [DP Pending P1 List](#)
- [Duplicate Payment Checks](#)
- [Filing a Difference Resolution](#)
- [Filing an Appeal](#)
- [Medicare Premium Buy-in Payments](#)
- [State Responsibilities DP Reviews](#)
- [Validating Beneficiary Information](#)
- [Validating Risk-Based Screening Documentation](#)
- [Overview of DP Review Process](#)
- [RC Secure File Transfer Via Kiteworks](#)
- [Repricing Medical Review Partial Errors](#)
- [Overview of Medical Review Process](#)
- [State Role in Medical Reviews](#)
- [State Report MR Missing Documentation](#)
- [Physician/Practitioner Visits in Nursing Facilities](#)
- [Template - State Education to Sampled Providers](#)

### Eligibility Review Contractor (BAH) Resources

- [PERM ERC Case Action Review Fact Sheet](#)
- [PERM ERC Household Composition Fact Sheet MAGI](#)
- [PERM ERC Household Composition Fact Sheet Non MAGI](#)
- [PERM ERC Income Review Fact Sheet](#)
- [PERM ERC SFTP Access for External Clients](#)
- [PERM ERC Independent Verification Fast Facts](#)
- [Overview of Eligibility Review Process](#)
- [State Responsibilities for Eligibility Review](#)
- [Eligibility Pending EP1 List](#)

### Statistical Contractor (The Lewin Group) Resources

- [PERM SC Fraud Suppression Fast Facts](#)
- [SFTP RY25 Final](#)

### Other Resources

- [Acronym List](#)
- [Federal Security Requirements for PERM Contractors FAQs](#)

# Claims - Searching for Claims

- To search for a specific claim in SMERF, choose Search under the Claims menu and enter any known claim identifiers or limiters. For claim details, click the paper icon.

HOME MEDICAL RECORDS REQUESTS ERRORS REPORTS CLAIMS CONTACTS RECOVERIES TOOLS

SEARCH

### Claim Search

Year	Quarter	Program	Category	Action
2026	ALL	ALL	ALL	Find

Claim Identifier Type: PERM ID Claim Identifier:

PERM ID	State Claim ID	Sampling Level	Year	State	Quarter	Claim Category	Program	Source Location	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	
		Entire Claim	2026		4	50	Medicaid	CAPMAN	

Columns Excel Page 1 of 377 View 1 - 10 of 3,762

# Claims - Searching for Claims - DP Tab

- Review the current status of a DP review using the Data Processing tab.

Policies	MRR Records	DP Records	Chronological Call Log		
Medical Records Requests	Providers	Data Processing	Medical Review	Eligibility Review	Comments
<b>DATA PROCESSING</b>					
<b>Review Status</b>					
START DATE: 10/04/2024    FINALIZED DATE: 01/10/2025    REVIEW STATUS: COMPLETED					
<b>Review History</b>					
LEVEL: APPROVED FOR SUD    STATUS: COMPLETED					
<b>Summary</b>					
Completed Date		1/10/2025			
<b>Payment Information</b>					
Paid FMAP Rate:		0.00			
Total Data Processing Claim Payment in Error:		\$0.00			
Federal Error Amount:		\$0.00			
State Error Amount:		\$0.00			
<b>Findings</b>					
Finding Code:		C1 - No Error in Review			



# Claims - Searching for Claims - MR Tab

- Check the current status of an MR by clicking on the Medical Review tab.

Medical Records Requests	Providers	Data Processing	<b>Medical Review</b>	Eligibility Review	Comments
<b>MEDICAL REVIEW</b>					
<b>Review Status</b>					
START DATE: 11/18/2024    FINALIZED DATE: 11/25/2024    REVIEW STATUS: COMPLETED					
<b>Review History</b>					
LEVEL: RECONCILED    STATUS: COMPLETED					
<b>Summary</b>					
Completed Date		11/25/2024			
<b>Payment Information</b>					
Paid FMAP Rate:		59.71			
Total Medical Review Claim Payment in Error:		\$0.00			
Federal Error Amount:		\$0.00			
State Error Amount:		\$0.00			
<b>Findings</b>					
Finding Code:		C1 - No Error in Review			

# Claims - Searching for Claims - ER Tab

- The Eligibility Review tab appears if an ER is planned or conducted for the PERM ID. Detailed information on the review is available on this tab, including status and findings.

Medical Records Requests

Providers

Data Processing

Medical Review

Eligibility Review

Comments

QC

## ELIGIBILITY REVIEW

### Review Status

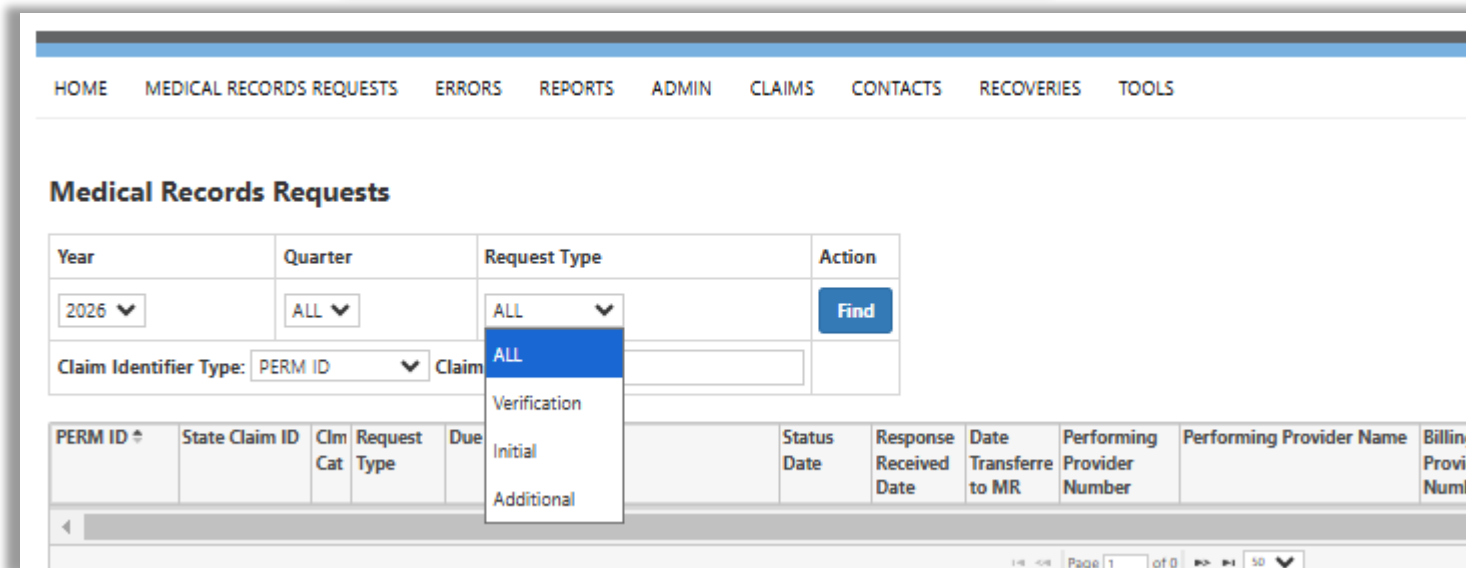
**FINALIZED DATE: 08/05/2023**    **REVIEW STATUS: COMPLETED**

### Case Details

<b>Paid FMAP Rate:</b>	69.34%			
<b>MAGI/NonMagi:</b>	MAGI	<b>Full/Emergency Services:</b>	Full	<b>Application/Renewal Date:</b> 5/5/2016
<b>Federal Eligibility Category:</b>	MAGI - Medicaid CHIP Expansion	<b>Point of Application:</b>	Not Applicable	<b>Determination/Redetermination Date:</b> 5/5/2016
<b>State Eligibility Category 1:</b>	50-CP-Children>177%-203%	<b>Channel of Application:</b>	Not Applicable	<b>Date of Last Action:</b> 5/5/2016
<b>State Eligibility Category 2:</b>		<b>Case Action:</b>	Redetermination	

# MRR - MRR Queries

- Users may identify all MRRs sent for your state's sampled claims by using the Medical Records Request search feature. The search can be narrowed by reporting year, quarter, request type, and claim identifier.



A screenshot of the 'Medical Records Requests' search interface. The page has a navigation bar with links: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, TOOLS. The main heading is 'Medical Records Requests'. Below the heading is a search form with the following fields:

Year	Quarter	Request Type	Action
2026	ALL	ALL	Find

Below the search form is a 'Claim Identifier Type' dropdown menu set to 'PERM ID'. A dropdown menu is open, showing options: ALL, Verification, Initial, and Additional. Below the search form is a table with the following columns:

PERM ID	State Claim ID	Clim Cat	Request Type	Due	Status Date	Response Received Date	Date Transferred to MR	Performing Provider Number	Performing Provider Name	Billing Provider Number
---------	----------------	----------	--------------	-----	-------------	------------------------	------------------------	----------------------------	--------------------------	-------------------------

At the bottom of the page, there is a pagination control showing 'Page 1 of 0' and a '50' dropdown menu.

# MRR - MRR Query Results

HOME MEDICAL RECORDS REQUESTS ERRORS REPORTS CLAIMS

SEARCH

## Medical Records Requests

Year: 2026 Quarter: ALL

Claim Identifier Type: PERM ID

Export to Excel

PERM ID	State Claim ID	Clm Cat	Request Type	Dur
	102	Initial	6/2	
	102	Initial	6/2	
	102	Initial	6/2	
	102	Initial	6/2	

- Additional detail is available for each request for records by clicking on the PERM ID link.

### Claim Details - Fee For Service

Print

Claim Summary

PERM ID:	-----	Year:		Sampled Amount Paid:	\$2,024.70
State:	California	Quarter:	1	Sampled Date Paid:	07/27/2018
State Claim ID:		Claim Category:	02 - Psychia...	Adjusted Date Paid:	
Claim Type:	Fee For Service	DOS:	01/21/2018 - 01/21/2018	Billing Provider ID:	
Adjusted:	NO	Sampling Level:	Entire Claim	Service Provider ID:	
Adjusted ICN:		Age:		Referring Provider NPI:	
Crossover:	NO	Gender:		Paid FMAP Rate:	0.00%
Denied:	NO	Location:	21		

Proc 1	Proc 2	Proc 3	Proc 4	Proc 5	Proc 6	Diag 1	Diag 2	Diag 3	Diag 4	Diag 5	Diag 6	Diag 7	Diag 8	Diag 9	DRG	ICD Version
						F339										10

Claim Lines

Line #	Sampled	Paid Amount	DOS From	DOS To	REV Code	Units	TOS	Src Prov ID	Src Prov Type	Src Prov Spec	NDC	Procedure Code	Proced Mod1	Proced Mod2	Proced Mod3	Proced Mod4	Prescription Number
0	Y	\$2,024.70				1							HE				

Claim User Fields

Line #	User Field1	User Field2	User Field3	User Field4	User Field5	User Field6	User Field7	User Field8	User Field9	User Field10
0		00.00							74	01.01

Policies MRR Records DP Records

Medical Records Requests Providers Data Processing Medical Review Comments

# MRR - MRR Query Results, continued

- Review detailed information on requests for records on the Medical Records Requests tab, including the date the MRR was sent, outreach made to the provider, and documents requested to complete the MR.

Medical Records Requests	Providers	Data Processing	Medical Review	Comments
<b>MEDICAL RECORDS REQUESTS</b>				
<b>INITIAL MEDICAL RECORD REQUEST</b>				
Request Type	Initial			
Initial Letter Date	4/10/2019			
Received Date	4/23/2019			
Request Status	Received Medical Record Documentation			
<b>Notification/Call Log</b>				
Notification/Call Type	Contact Name	Contact Phone	Call Date	CSR Comments
Initial	Contact Name	(123)456-7891	mm/dd/yyyy	CSR Comments Here Re: Contact with Provider
Initial				
<b>Requested Documents</b>				
<b>Psychiatric, Mental Health, and Behavioral Health Services: In/Outpatient Psychological, Psychiatric, and Behavioral Health Services, Drug and Alcohol In/Outpatient Services, Group Homes</b>	<ul style="list-style-type: none"><li>• Admission Face Sheet/Coding Summary</li><li>• Admission History and Physical</li><li>• All Transfer Forms: Voluntary, Involuntary, or Court Ordered</li><li>• Clinic/Office Visit Record/Notes</li><li>• Consultation Reports/Notes</li><li>• Discharge Summary</li><li>• Documentation of Daily Patient Presence</li><li>• Emergency Department Record/Notes</li><li>• Evaluation and Management (E&amp;M)/Counseling Notes</li><li>• Medication Administration Record</li><li>• Mental Health Progress/Therapy Notes/Daily Attendance Logs</li><li>• Nursing Assessment, Flowsheets/Notes</li><li>• Physician Orders</li><li>• Psychiatric Certification for Admission</li><li>• Psychiatric Evaluation/Testing</li><li>• Treatment Administration Record/Notes</li></ul>			

# MRR - MRR Query Result Detail - Providers Tab

- The Providers tab includes address, phone, fax, specialty, provider type, and National Provider Identifier (NPI) information on the billing provider, performing provider, and referring provider, where applicable.

The screenshot displays a web interface with a navigation bar at the top containing tabs: "Medical Records Requests", "Providers" (highlighted with a red box), "Data Processing", "Medical Review", and "Comments". Below the navigation bar, the main content area is titled "PROVIDERS" and is divided into three sections: "BILLING PROVIDER", "PERFORMING PROVIDER", and "REFERRING PROVIDER". Each section contains a form with fields for "Provider Name", "Address", "Phone", "Fax", "Provider Specialty", "Provider Type", "Provider Number", and "NPI". The "Billing Provider" and "Performing Provider" sections have populated values, while the "Referring Provider" section is empty.

PROVIDERS	
<b>BILLING PROVIDER</b>	
<b>Provider Name:</b>	Provider Name
<b>Address:</b>	Address Details
<b>Phone:</b>	
<b>Fax:</b>	
<b>Provider Specialty:</b>	
<b>Provider Type:</b>	
<b>Provider Number:</b>	123456789
<b>NPI:</b>	123456789
<b>PERFORMING PROVIDER</b>	
<b>Provider Name:</b>	Provider Name
<b>Address:</b>	Address Details
<b>Phone:</b>	
<b>Fax:</b>	
<b>Provider Specialty:</b>	
<b>Provider Type:</b>	
<b>Provider Number:</b>	123456789
<b>NPI:</b>	123456789
<b>REFERRING PROVIDER</b>	
<b>Provider Name:</b>	
<b>Address:</b>	
<b>Phone:</b>	
<b>Fax:</b>	
<b>Provider Specialty:</b>	
<b>Provider Type:</b>	
<b>Provider Number:</b>	
<b>NPI:</b>	

# MRR - MRR Query Result Detail - Comments Tab

- The Comments tab is for internal comments from the state user.
- **Note:** Contractors are not alerted when comments are entered. Therefore, please notify the RC or ERC of any questions or action items needed.

The screenshot displays a web interface with a navigation bar at the top containing tabs for Policies, MRR Records, and DP Records. Below this is a secondary navigation bar with tabs for Medical Records Requests, Providers, Data Processing, Medical Review, and Comments. The Comments tab is highlighted with a red border. Underneath, the heading "STATE COMMENTS" is followed by a table with columns for Comment Date, Comment Type, Created By, and Text. Below the table is a text input field with the instruction "Type in new comment (maximum length is 200 characters):" and an "Add" button, which is also highlighted with a red border.

Comment Date	Comment Type	Created By	Text
--------------	--------------	------------	------

Type in new comment (maximum length is 200 characters):

Add

# MRR - MRR Query Result Detail - Policies

- Policy information can be obtained in the SMERF system. Clicking on the Policies tab will give you the options of Eligibility Policy, Deskadds, MR State Policies, and Federal Regulations.

The screenshot displays the SMERF system interface for MRR Query Result Detail. At the top, there are three tabs: "Policies" (highlighted with a red box), "MRR Records", and "DP Records". Below the tabs, the main content area is titled "Policies" and contains a list of four expandable items: "Eligibility Policy", "Deskadds", "MR State Policies", and "Federal Regulations". On the left side, there is a sidebar with a "Medical Records Request" header and a "MEDICAL RECORDS" section. Below this, there is a "Request Type" section with a "Request Status" field. Further down, there is a "Notification/Call" section with a "Notification/Call Type" field. At the bottom, there is a "Requested Documents" section. The interface is clean and professional, with a white background and blue accents.



# MRR - MRR Query Result Detail - Policies (continued)

- Relevant policies used in conducting reviews can be viewed by clicking on the Policies tab, then clicking the dropdown arrow next to the chosen policy area.

Claim User Fields

Line	User Field1	User Field2	User Field3	User Field4	User Field5	User Field6
1						

Page 1 of 1

**Policies** | MRR Records | DP Records | Chronological Call Log

Medical Records Requests | Providers | Data Processing | Medical

### MEDICAL RECORDS REQUESTS

- STATUS LOG
- ADDITIONAL MEDICAL RECORD REQUEST
- INITIAL MEDICAL RECORD REQUEST

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Eligibility Policy

Year : **2025** State : **DE** MAGI :

Please enter documents display filter:  [Apply Filter](#)

Title	MAGI	File Name
12 months continuous postpartum coverage	MAGI	DE_SPA_DE-22-0011 12MonthsContinuousPostpartumCoverag
19-0008 Updates Optional Eligibility Groups	Non-Magi	DE_SPA_DE-19-0008UpdatesOptionalEligibilityGroups_11
20000 Medicaid Long Term Care	Non-Magi	DE_AC_20000MedicaidLongTermCare_08
Application for 1915(c) HCBS Waiver: DE.0009.R08.06 - Oct 01, 2022 (as of Oct 01, 2022)	Non-Magi	DE_WA_DelawareDDDSHomeandCommuBased1915(c)LifespanWaiverAmendment
Attachment 4.11 to Attachment 7.7	ALL	DE_SP_Attachment4.11-AtoAttachment7.7.C_10012022.pdf
Compliance with the TPL Requirement	ALL	DE_SPA_DE-22-0006CompliancewiththeTPLRequirement
Copay and Premium Suspension	ALL	DE_SPA_DE-20-0002CopayandPremiumSuspension_0301
COVID 1115 Demonstration Approval	MAGI	DE_WA_DiamondStateHealthPlan(DSHP)
DE Disaster Relief MAGI-Based Verification Plan Addendum	MAGI	DE_VP_DisasterAddendum_03012020.pdf
Delaware Healthy Children Program	MAGI	DE_AC_18000DelawareHealthyChildrenPr

Page 1 of 2 View 1 - 10 of 20

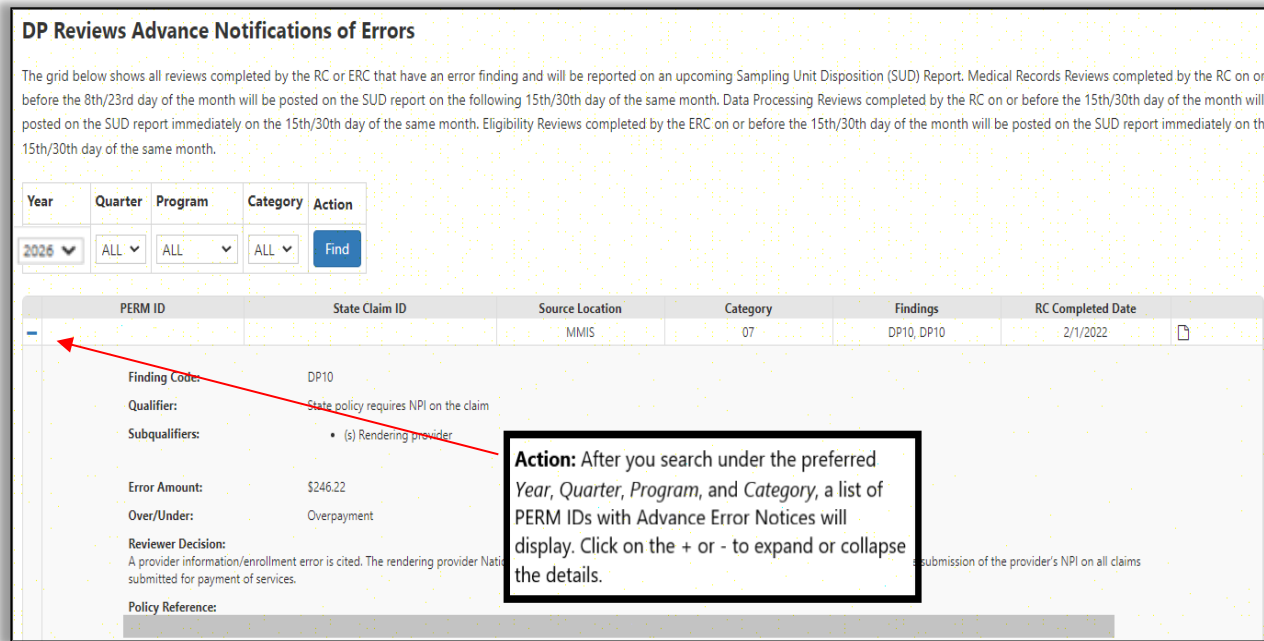
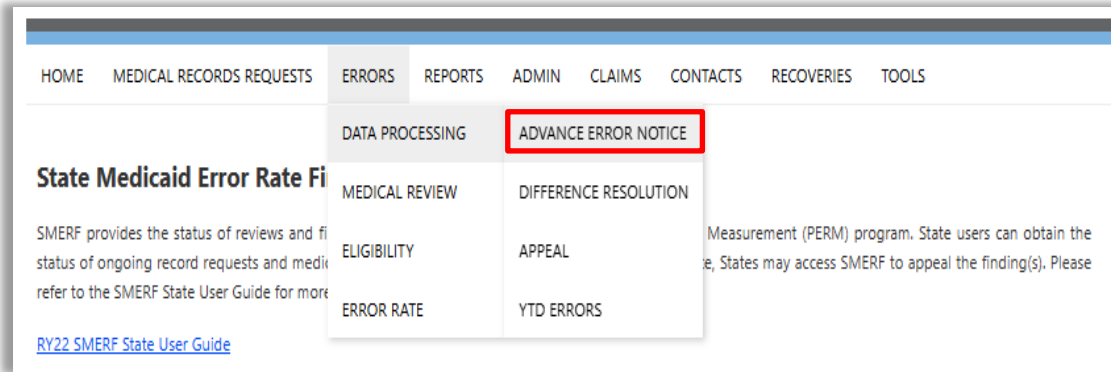
- Desk aids
- MR State Policies
- Federal Regulations

# Errors Tab

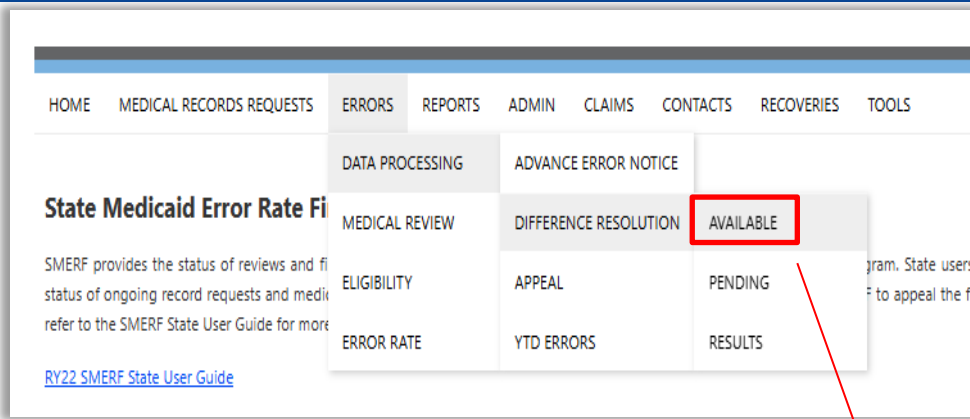


# Errors - DP Advance Error Notice

- The DP Advance Error Notice screen shows reviews completed by the RC that have an error finding and will be reported on an upcoming SUD Report, except for errors that are cited the day before the SUD runs- these errors will not generate an Advance Error Notice.
- Note:** Findings do not post to the Advance Error Notice immediately but will be available for review within 24 hours.
- DP reviews completed before the 15<sup>th</sup>/30<sup>th</sup> of the month will be posted on the next scheduled SUD. Example: A DP review completed on the May 14<sup>th</sup> will publish on May 15<sup>th</sup> SUD.



# Errors - DP DR Available



- Users can view DP reviews that are available for DR, as well as check the status and/or results of a requested DR.

### DP Reviews Available for Difference Resolution

The grid below shows all reviews available for difference resolution. The state has 25 business days to request the difference resolution. The countdown starts when the finding is posted on a Sampling Unit Disposition (SUD) report. The day when the finding was posted is considered day one of the timeframe.

**Multiple findings are listed here if the RC cites more than one finding for a PERM ID.**

**Action: Click on paper icon to see claim details.**

Year	Quarter	Program	Category	Action
2026	I	ALL	ALL	Find

PERM ID	State Claim ID	Source Location	Category	Findings	RC Completed Date	State Notice Date	DR Request Deadline	Action
		MMIS	13	DP10	01/28/2022	01/30/2022	03/07/2022	
<b>Finding Code:</b>		DP10						
<b>Qualifier:</b>		Provider not screened using risk based criteria prior to claim payment date						
<b>Subqualifiers:</b>		<ul style="list-style-type: none"><li>(s) Newly enrolled provider</li><li>(s) Limited risk provider</li><li>(s) SAM or EPLS was not checked</li><li>(s) NPPES was not checked</li><li>(s) Billing provider</li></ul>						
<b>Error Amount:</b>		\$150.00						
<b>Over/Under:</b>		Overpayment						
<b>Reviewer Decision:</b>		Reviewer Decision details will be populated here.						
<b>Policy Reference:</b>		455.436						
		MMIS	13	DP10	01/28/2022	01/30/2022	03/07/2022	
		MMIS	13	DP10	01/28/2022	01/30/2022	03/07/2022	
		MMIS	13	DP10	01/28/2022	01/30/2022	03/07/2022	

**Action: Click on the pencil icon to go to the screen with the Request Difference Resolution tab.**

# Filing a DP DR

- If a state disagrees with an error finding and has factually based, valid evidence to support that the payment is accurate, the state may request a DR within SMERF.
- The Code of Federal Regulation, [42 CFR § 431.998](#), provides specific requirements for DRs including:
  - The State must file the DR within 25 business days after the review findings are shared with the State (i.e., published on the SUD report);
  - **The State must be able to demonstrate all of the following:**
    - **Have a factual basis for filing the request, and**
    - **Provide valid evidence directly related to the finding(s) to support the State's position.**
- The RC will offer a separate training dedicated to filing DRs and appeals.

# Errors - DP DR Pending

- To review the status of a pending DR, choose Pending from the Errors/Data Processing/Difference Resolution menu.

The screenshot shows a web application interface with a navigation menu at the top. The menu items are: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' menu is expanded, showing a sub-menu with the following items: DATA PROCESSING, ADVANCE ERROR NOTICE, MEDICAL REVIEW, DIFFERENCE RESOLUTION, ELIGIBILITY, APPEAL, ERROR RATE, YTD ERRORS, AVAILABLE, PENDING (highlighted with a red box), and RESULTS. Below the navigation menu, there is a section titled 'DP Reviews Pending Difference' with a sub-header 'The grid below shows all reviews, for which d'. Below this, there is a search filter table with columns: Year, Quarter, Program, and Category. The values are: Year: 2026, Quarter: ALL, Program: ALL, Category: ALL. A 'Find' button is located below the filter table. To the right of the search filter, there is a text label: 'The RC Difference Resolution reviewers.'

# Errors - DP DR Results

- To review the result of a completed DR, choose Results from the Errors/Data Processing/Difference Resolution menu.

The screenshot shows a web application interface with a navigation menu at the top. The menu items are: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' menu is expanded, showing a sub-menu with the following items: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. The 'DIFFERENCE RESOLUTION' sub-menu is further expanded, showing a list of options: AVAILABLE, PENDING, and RESULTS. The 'RESULTS' option is highlighted with a red box. Below the navigation menu, there is a section titled 'DP Reviews Pending Difference Resolution' with a description: 'The grid below shows all reviews, for which d...'. Below this section, there is a table with columns: Year, Quarter, Program, and Category. The table contains the following data: Year: 2026, Quarter: ALL, Program: ALL, Category: ALL. There is a 'Find' button next to the table.

Year	Quarter	Program	Cate
2026	ALL	ALL	ALL

# Errors - DP Appeal Available

- To view all PERM IDs available for appeal, choose Available from the Errors/Data Processing/Appeal menu.

The screenshot shows a web application interface with a navigation bar at the top containing the following items: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' menu is expanded, showing a sub-menu with the following options: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. The 'APPEAL' option is further expanded, showing a sub-menu with the following options: AVAILABLE, PENDING, and RESULTS. The 'AVAILABLE' option is highlighted with a red border. Below the navigation bar, there is a section titled 'DP Reviews Available for Ap' with a sub-header 'The grid below shows all reviews for which A'. Below this, there is a search filter table with columns: Year, Quarter, Program, and Cate. The values are: Year: 2026, Quarter: ALL, Program: ALL, Cate: ALL. There is a 'Find' button. Below the search filter, there is a table with columns: PERM ID, State Claim ID, Source Location, Category, Findings, and RC Completed. At the bottom, there is a 'Columns' button, an 'Excel' button, and a pagination control showing 'Page 1 of 0' and a dropdown menu with '5'.



# Requesting an Appeal

- The Code of Federal Regulation, [42 CFR § 431.998](#), provides specific requirements for appeals including:
  - The State may appeal to CMS for final resolution by filing an appeal in SMERF within 15 business days from the date the review contractor's (RC or ERC) finding as a result of DR is shared with the State;
  - There is no minimum dollar threshold required to appeal a difference in findings;
  - **The State must be able to demonstrate all of the following:**
    - **Have a factual basis for filing the request, and**
    - **Provide valid evidence directly related to the finding(s) to support the State's position.\***

\*Refer to Fast Facts: RC Secure File Transfer Via Kiteworks on documentation naming convention and submission.

# Requesting an Appeal, continued

- Request Appeal tab in SMERF shows appeal status.

RC Review Details | DR Request Summary | DR Result Details | **Request Appeal**

Enter reasons why you're requesting the Appeal. Insert specific reasons in the text box below for the error you are disputing. **(Do not include PHI)**. If you need to submit documentation containing PHI please refer to the RC's State Instructions for Submitting Records. Please be advised that text from Word documents or other sources can be copied (CTRL+C) and pasted (CTRL+V) into the sections below. The Comments field will not accept images or imbedded/uploaded files.

<b>Request Appeal:</b>	Yes
<b>Finding Code:</b>	DP2 - Non-Covered Service/Beneficiary Eligibility/MMIS System Error
<b>Qualifier:</b>	Eligibility in source system and MMIS match, but claim should not have paid under CHIP
<b>Comments (Do not include PHI/PII):</b>	

1/2000

Save Cancel Submit

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# Errors - DP Appeals Pending

- Review current status of pending appeals by choosing Pending from the Errors/Data Processing/Appeal menu.

The screenshot shows a web application interface with a navigation bar at the top. The navigation bar includes links for HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' link is selected, and a sub-menu is open. The sub-menu contains the following items: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. The 'APPEAL' item is selected, and a second sub-menu is open. This second sub-menu contains the following items: AVAILABLE, PENDING, and RESULTS. The 'PENDING' item is highlighted with a red border. Below the navigation bar, there is a section titled 'DP Reviews Pending Difference' with a description: 'The grid below shows all reviews, for which d...'. Below this description is a table with columns for Year, Quarter, Program, and Category. The table has dropdown menus for each column, with values 2026, ALL, ALL, and ALL respectively. A 'Find' button is located to the right of the table. To the right of the table, there is a text label: '... RC Difference Resolution reviewers.'

# Errors - DP Appeals Results

- Review the results of appeals submitted by choosing Results from the Errors/Data Processing/Appeal menu.

The screenshot shows a web application interface with a navigation menu at the top. The 'ERRORS' menu is open, displaying a list of options. The 'RESULTS' option is highlighted with a red box. Below the navigation menu, there is a section titled 'DP Reviews Appeal Complet' and a search filter table.

Year	Quarter	Program	Cate
2026	ALL	ALL	ALL

**Find**

**RESULTS**

# Errors - DP YTD Errors

- To review Year-To-Date (YTD) DP errors, choose YTD Errors under the Errors/Data Processing menu.

The screenshot displays a web application interface with a navigation menu at the top. The 'ERRORS' menu is open, showing a list of options: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. The 'YTD ERRORS' option is highlighted with a red box. Below the menu, there is a section titled 'DP Reviews Year-To-Date Er' with a description: 'Shows claims where the highest completed le listed)'. Below this is a search filter section with dropdown menus for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), and a 'Find' button. At the bottom, there is a table header with columns: PERM ID, State Claim ID, Source Location, Category, Findings, Error Amount, Over/Under, State Report Date, and Review Status. The table content is empty, showing 'Page 1 of 0' and 'No records to view'.

Year	Quarter	Program	Cate
2026	ALL	ALL	ALL

PERM ID	State Claim ID	Source Location	Category	Findings	Error Amount	Over/Under	State Report Date	Review Status
No records to view								

# Errors - MR Advance Error Notice

- Check all reviews completed by the RC or ERC that have an error finding and will be reported on an upcoming SUD Report by choosing Advance Error Notice under the Errors/Review Type menu. In the image, the user has selected Errors then Medical Review to see menu options for the Medical Review review type.
- **Note:** Findings do not post to the Advance Error Notice immediately but will be available for review within 24 hours.

The screenshot shows a web application interface with a navigation bar at the top containing the following items: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, TOOLS. The 'ERRORS' menu is expanded, showing a list of options: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE (highlighted with a red box), DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. Below the navigation bar, there is a section titled 'MR Reviews Advance Notifi' with a description: 'The grid below shows all reviews completed by the RC on or before the 15th/15th/30th day of the month will be posted o'. Below this text is a search filter table with columns: Year, Quarter, Program, Category, and Action. The values are: Year: 2026, Quarter: ALL, Program: ALL, Category: ALL, and a 'Find' button. At the bottom of the page, there is a table header with columns: PERM ID, State Claim ID, Source Location, Category, Findings, and RC Completed Date. Below the header, there are controls for 'Columns', 'Excel', and pagination: 'Page 1 of 0' and '5' items. The status at the bottom right is 'No records to view'.

# Errors - MR DR Available

- Review MR errors eligible for DR by choosing Available under the Errors/Medical Review/Difference Resolution menu.

The screenshot shows a web application interface with a navigation menu at the top. The 'ERRORS' menu is expanded, showing a sub-menu with the following items: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. The 'DIFFERENCE RESOLUTION' sub-menu is further expanded, showing 'AVAILABLE', 'PENDING', and 'RESULTS'. The 'AVAILABLE' option is highlighted with a red box. Below the menu, there is a section titled 'MR Reviews Available for Di' with a description: 'The grid below shows all reviews available for... report. The day when the finding was posted...'. There are filters for Year (2026), Quarter (ALL), Program (ALL), and Ca (ALL), along with a 'Find' button. At the bottom, there is a table header with columns: PERM ID, State Claim ID, Source Location, Category, Findings, RC Completed Date, State Notice Date, and DR Request Deadline. The table footer shows 'Page 1 of 0' and 'No records to view'.

Year	Quarter	Program	Ca	Find
2026	ALL	ALL	ALL	Find

PERM ID	State Claim ID	Source Location	Category	Findings	RC Completed Date	State Notice Date	DR Request Deadline
No records to view							

# Requesting an MR DR

- Click on the Request Difference Resolution tab.

The screenshot shows a web interface with a tab labeled "Request Difference Resolution" highlighted in red. Below the tab, there are several sections: "RC Review Details" with "RC Completed Date: 12/20/2024" and "Date of Error Notification: 12/30/2024"; "MEDICAL REVIEW" with "Review Status" showing "START DATE: 05/31/2024" and "REVIEW STATUS: IN PROCESS"; "Review History" with "LEVEL: RECONCILED" and "STATUS: COMPLETED"; "Summary" with "Completed Date: 12/20/2024" and "Result Notification Date: 12/21/2024"; "Payment Information" with a table of financial data; and "Findings" with "Finding Code: MR2 - Document(s) Absent from Record Error" and "Qualifier: One or more documents are missing from the record that are required to support payment".

RC Review Details   Request Difference Resolution

RC Completed Date: 12/20/2024   Date of Error Notification: 12/30/2024

### MEDICAL REVIEW

**Review Status**

START DATE: 05/31/2024   REVIEW STATUS: IN PROCESS

**Review History**

LEVEL: RECONCILED   STATUS: COMPLETED

#### Summary

Completed Date	12/20/2024
Result Notification Date	12/21/2024

#### Payment Information

Paid FMAP Rate:	73.51
Total Medical Review Claim Payment in Error:	\$13.60
Incorrect Payment Type:	Overpayment
Federal Error Amount:	\$10.00
State Error Amount:	\$3.60

#### Findings

**Finding Code:** MR2 - Document(s) Absent from Record Error

**Qualifier:** One or more documents are missing from the record that are required to support payment

**Subqualifiers:**

- Provider did not submit the school-based services service note (behavioral, medication sampled DOS)



# Errors - MR DR Pending

- Review MR pending DR by choosing Pending under the Errors/Medical Review/Difference Resolution menu.

The screenshot shows a web application interface with a navigation menu at the top. The 'ERRORS' menu is open, displaying a list of options. The 'PENDING' option is highlighted with a red box. Below the menu, there is a search filter section with dropdowns for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), and a 'Find' button. The main content area shows a table header with columns: PERM ID, State Claim ID, Source Location, Category, DR Findings, DR Requested Date, and Pending Days. The table is currently empty, displaying 'No records to view'.

HOME MEDICAL RECORDS REQUESTS ERRORS REPORTS ADMIN CLAIMS CONTACTS RECOVERIES TOOLS

DATA PROCESSING

**MR Reviews Pending Difference**

The grid below shows all reviews, for which d

ADVANCE ERROR NOTICE

MEDICAL REVIEW

DIFFERENCE RESOLUTION AVAILABLE

ELIGIBILITY

ERROR RATE

APPEAL

YTD ERRORS

RESULTS

RC Difference Resolution reviewers.

Year Quarter Program Category

2026 ALL ALL ALL Find

PERM ID State Claim ID Source Location Category DR Findings DR Requested Date Pending Days

Columns Excel Page 1 of 0 5

No records to view

# Errors - MR DR Results

- Review completed DR findings by choosing Results from the Errors/Medical Review/Difference Resolution menu.

The screenshot shows a web application interface with a navigation bar at the top containing the following items: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' menu is expanded, showing a list of options: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. A sub-menu for 'DIFFERENCE RESOLUTION' is also open, listing: AVAILABLE, PENDING, and RESULTS. The 'RESULTS' option is highlighted with a red rectangular border. Below the navigation menu, the page title is 'MR Reviews Difference Reso' and a sub-header reads 'The grid below shows all reviews completed'. Below this is a search filter table with columns for Year, Quarter, Program, and Category, each with a dropdown menu. The values are 2026, ALL, ALL, and ALL respectively. A blue 'Find' button is located to the right of the search filters.

Year	Quarter	Program	Cate
2026 ▼	ALL ▼	ALL ▼	ALL ▼

[Find](#)

# Errors - MR Appeals Available

- Review MR DRs eligible for appeal by choosing Available under the Errors/Medical Review/Appeal menu.

The screenshot shows a web application interface with a navigation menu at the top. The 'ERRORS' menu item is selected, and its sub-menu is open. The sub-menu includes options like 'DATA PROCESSING', 'MEDICAL REVIEW', 'ELIGIBILITY', 'ERROR RATE', 'ADVANCE ERROR NOTICE', 'DIFFERENCE RESOLUTION', 'APPEAL', 'YTD ERRORS', 'PENDING', and 'RESULTS'. The 'APPEAL' option is selected, and its sub-menu is open, with the 'AVAILABLE' option highlighted by a red box. Below the navigation menu, there is a section titled 'MR Reviews Available for Appeal' with a description: 'The grid below shows all reviews for which A... pending appeal.' Below this is a search filter section with dropdowns for 'Year' (2026), 'Quarter' (ALL), 'Program' (ALL), and 'Category' (ALL), and a 'Find' button. At the bottom, there is a table header with columns: 'PERM ID', 'State Claim ID', 'Source Location', 'Category', 'RC Completed Date', and 'State ID'. There are also icons for 'Columns' and 'Excel'.

# Requesting an MR Appeal

- To file an appeal on a DR resulting in a modified or upheld decision, click the Request Appeal tab.

RC Review Details	DR Request Summary	DR Result Details	<b>Request Appeal</b>
RC Completed Date: 01/02/2025    Date of Error Notification: 12/16/2024			
<b>MEDICAL REVIEW</b>			
<b>Review Status</b>			
START DATE: 10/16/2024    REVIEW STATUS: IN PROCESS			
<b>Review History</b>			
LEVEL: RECONCILED    STATUS: COMPLETED			
<b>Summary</b>			
Completed Date	12/13/2024		
Result Notification Date	12/14/2024		
<b>Payment Information</b>			
Paid FMAP Rate:	65.76		
Total Medical Review Claim Payment in Error:	\$202.04		
Incorrect Payment Type:	Underpayment		
Federal Error Amount:	\$132.86		
State Error Amount:	\$69.18		
<b>Findings</b>			
Finding Code:	MR6 - Number of Unit(s) Error		
Qualifier:	Number of units billed is less than number of units documented		

# Errors - MR Appeals Pending

- Review MR appeals pending completion by choosing Pending under the Errors/Medical Review/Appeal menu.

The screenshot displays a web application interface with a navigation menu at the top. The 'ERRORS' menu item is selected, and a dropdown menu is open. Within this dropdown, the 'MEDICAL REVIEW' option is selected, and its own dropdown menu is visible. In this second-level dropdown, the 'APPEAL' option is selected, and its dropdown menu is open. The 'PENDING' option in this final dropdown is highlighted with a red rectangular box. Below the navigation menus, there is a section titled 'MR Reviews Pending Appeals' with a search filter table and a table header. The search filter table includes columns for Year, Quarter, Program, and Category, with a 'Find' button. The table header includes columns for PERM ID, State Claim ID, Source Location, Category, Appeal Requested Date, and Pending Days. The page footer shows 'Page 1 of 0' and 'No records to view'.

Year	Quarter	Program	Category
2026	ALL	ALL	ALL

PERM ID	State Claim ID	Source Location	Category	Appeal Requested Date	Pending Days
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# Errors - MR Appeals Results

- Review completed MR appeals by choosing Results under the Errors/Medical Review/Appeal menu.

The screenshot displays a web application interface with a navigation menu at the top. The menu items are: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' menu is expanded, showing a sub-menu with the following items: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, APPEAL, and YTD ERRORS. The 'APPEAL' item is further expanded, showing a sub-sub-menu with the following items: AVAILABLE, PENDING, and RESULTS. The 'RESULTS' item is highlighted with a red rectangular box. Below the navigation menu, there is a section titled 'MR Reviews Appeal Comple' and a search filter section with dropdown menus for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), along with a 'Find' button. Below the search filter, there is a table with columns: PERM ID, State Claim ID, Source Location, RESULTS, Error Code, Completed Date, and Appeal Decision. The 'RESULTS' column header is highlighted with a red rectangular box. At the bottom right of the table, it says 'No records to view'.

# Errors - MR YTD Errors

- To review YTD MR errors, choose YTD Errors under the Errors/Medical Review menu.

The screenshot displays a web application interface with a navigation menu at the top. The 'ERRORS' menu item is selected, and a dropdown menu is open. The 'MEDICAL REVIEW' option is selected, and a sub-menu is open. The 'YTD ERRORS' option is highlighted with a red box. Below the menu, there are filters for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), along with a 'Find' button. A table header is visible at the bottom, including columns for PERM ID, State Claim ID, Source Location, Category, Findings, Error Amount, Over/Under, State Report Date, and Review Status. The page number is 1 of 0, and there are 5 items.

HOME MEDICAL RECORDS REQUESTS **ERRORS** REPORTS ADMIN CLAIMS CONTACTS RECOVERIES TOOLS

DATA PROCESSING

**MR Reviews Year-To-Date Errors**

Shows claims where the highest completed (not yet listed)

ADVANCE ERROR NOTICE

DIFFERENCE RESOLUTION

APPEAL

**YTD ERRORS**

Year: 2026 Quarter: ALL Program: ALL Category: ALL Find

PERM ID State Claim ID Source Location Category Findings Error Amount Over/Under State Report Date Review Status

Columns Excel Page 1 of 0 5

# Errors - Eligibility Advance Error Notice

- Check all reviews completed by the ERC that have an error finding and will be reported on an upcoming SUD Report.
- ERs completed by the ERC before the 15th/30th day of the month will be posted on the SUD report immediately on the 15th/30th day of the same month.

HOME MEDICAL RECORDS REQUESTS ERRORS REPORTS ADMIN CLAIMS CONTACTS RECOVERIES TOOLS

**ER Reviews Advance Notice**

The grid below shows all reviews completed by the RC on or before the 15th/30th day of the month will be posted on an upcoming Sampling Unit Disposition (SUD) Report. Medical Records Reviews a immediately on the 15th/30th day of the same month. Eligibility Reviews completed by the ER same month.

Year	Quarter	Program	Category	Action
2026	ALL	ALL	ALL	<a href="#">Find</a>

DATA PROCESSING  
MEDICAL REVIEW  
**ADVANCE ERROR NOTICE**  
DIFFERENCE RESOLUTION  
APPEAL  
YTD ERRORS



# Errors - Eligibility DR Available

- Review ER errors eligible for DR by choosing Available under the Errors/Eligibility/Difference Resolution menu.

The screenshot displays a web application interface with a top navigation bar containing the following items: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' menu is expanded, showing a sub-menu with the following options: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. The 'DIFFERENCE RESOLUTION' option is further expanded, and the 'AVAILABLE' option is highlighted with a red rectangular border. Other options in this sub-menu include PENDING and RESULTS.

Below the navigation menu, there is a section titled 'ER Reviews Available for Dif' with a description: 'The grid below shows all reviews available fo report. The day when the finding was posted'. Below this text is a search filter section with dropdown menus for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), along with a 'Find' button.

At the bottom of the interface, there is a table header with columns: PERM ID, State Claim ID, Sol, ERC Completed Date, State Notice Date, and DR Request Deadline. Below the header is a pagination bar showing 'Page 1 of 0' and a '5' dropdown. The text 'No records to view' is displayed at the bottom right.

# Requesting an Eligibility DR

- Request a DR from the Difference Resolution detail window by clicking the Request Difference Resolution tab.

Eligibility Difference Resolution Request 1 ..... 08

Claim Summary

PERM ID:		Year:	2025	Sampled Amount Paid :	\$583.66
State:	is	Quarter:	1	Sampled Date Paid:	08/25/2023
State Claim ID:		Claim Category:	50 - Managed...	Adjusted Date Paid:	
Claim Type:	Managed Care	DOS:	08/01/2023 - 08/31/2023	Billing Provider ID:	
Adjusted:	NO	Sampling Level:	Entire Claim	Service Provider ID:	
Adjusted ICN:		Age:		Referring Provider NPI:	
Crossover:	NO	Gender:		Paid FMAP Rate:	66.75%
Denied:	NO	Location:	EDW	Unmasked State Claim ID:	

Proc 1	Proc 2	Proc 3	Proc 4	Proc 5	Proc 6	Diag 1	Diag 2	Diag 3	Diag 4	Diag 5	Diag 6	Diag 7	Diag 8	Diag 9	DRG	ICD Version	EAPG Rate Code
																9	

Claim Lines

Line #	Sampled	Paid Amount	DOS From	DOS To	REV Code	Units	TOS	Src Prov ID	Src Prov	Src Prov	NDC	Procedure Cod	Procedur	Procedur	Procedur	Procedur	Prescription Num
--------	---------	-------------	----------	--------	----------	-------	-----	-------------	----------	----------	-----	---------------	----------	----------	----------	----------	------------------

ERC Review Details | **Request Difference Resolution**

ERC Completed Date: 01/13/2025    Date of Error Notification: 01/15/2025

**Review Status**

START DATE: 01/13/2025    REVIEW STATUS: IN PROCESS

**Review History**

LEVEL: APPROVED FOR SUD    STATUS: COMPLETED

**Summary**

Completed Date	1/13/2025
----------------	-----------

**Payment Information**

Paid FMAP Rate:	66.75%
Total Eligibility Claim Payment in Error:	\$583.66
Federal Error Amount:	\$389.11
State Error Amount:	\$194.55

**Findings**

Finding Code:	ER5 - Not eligible for enrolled program; non-financial issue
Qualifier:	Requirement not met
Error Amount:	\$583.66

**Action:** Click on the *Request Difference Resolution* tab to go to the page where you can enter your reason for requesting a DR.

# Errors - Eligibility DR Pending

- Review ERs pending DR by choosing Pending under the Errors/Eligibility/Difference Resolution menu.

The screenshot displays a web application interface with a navigation menu at the top containing: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' menu is open, showing a list of options: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. The 'DIFFERENCE RESOLUTION' sub-menu is also open, showing options: AVAILABLE, PENDING (highlighted with a red box), and RESULTS. Below the menu, the page title is 'ER Reviews Pending Difference Resolution'. A search filter section includes dropdowns for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), along with a 'Find' button. A table header is visible with columns: PERM ID, State Claim ID, Source Location, DR Requested Date, and Pending Days. The table content area is empty, displaying 'No records to view'.

# Errors - Eligibility DR Results

- Review eligibility findings pending DR by choosing Results under the Errors/Eligibility/Difference Resolution menu.

The screenshot displays a web application interface with a navigation menu at the top. The 'ERRORS' menu item is selected, and its sub-menu is open. The sub-menu options are: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, and YTD ERRORS. The 'ELIGIBILITY' option is highlighted, and its sub-menu is open, showing options: AVAILABLE, PENDING, and RESULTS. The 'RESULTS' option is highlighted with a red box. Below the navigation menu, there is a section titled 'ER Reviews Difference Resol' and a search filter section with dropdown menus for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), along with a 'Find' button. At the bottom, there is a table header with columns: PERM ID, State Claim ID, Source Location, Category, YTD ERRORS, R Decision, and Appeal Requ. There are also icons for 'Columns' and 'Excel'.

# Errors - Eligibility Appeal Available

- Review eligibility DRs available for appeal by choosing Available under the Errors/Eligibility/Appeal menu.

The screenshot shows a web application interface with a navigation menu at the top. The 'ERRORS' menu is selected, and a sub-menu is open. The sub-menu options are: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ERROR RATE, APPEAL, YTD ERRORS, and ADVANCE ERROR NOTICE. The 'APPEAL' option is selected, and a further sub-menu is open, showing 'AVAILABLE', 'PENDING', and 'RESULTS'. The 'AVAILABLE' option is highlighted with a red box. Below the menu, there is a search filter section with dropdowns for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), and a 'Find' button. Below the search filter, there is a table header with columns: PERM ID, State Claim ID, Sol, YTD ERRORS, ERC Completed Date, State Notice Date, and Appeal Request Deadlin. The table content is empty, and the text 'No records to view' is displayed at the bottom right.

# Requesting an Eligibility Appeal

- Request an Eligibility appeal by clicking on the Request Appeal tab.

**Eligibility Appeal Request for**

▼ Claim Summary

PERM ID:	Year:	2022	Sampled Amount Paid :	\$308.98
State:	Quarter:	1	Sampled Date Paid:	07/09/2020
State Claim ID:	Claim Category:	50 - Managed...		
Claim Type:	DOS:	07/01/2020 - 07/...		
Adjusted:	Sampling Level:	Entire Claim		
Adjusted ICN:	Age:			
Crossover:	Gender:			
Denied:	Location:	IC		

Proc 1	Proc 2	Proc 3	Proc 4	Proc 5	Proc 6	Diag 1	Diag 2	Diag 3	Diag 4	Diag 5	Diag 6	Diag 7	Diag 8	Diag 9	Diag 10

▼ Claim Lines

Line #	Sampled	Paid Amount	DOS From	DOS To	REV Code	Units	TOS	Src Prov ID	Src Prov	Src Prov	NDC	Procedure Code

▼ Claim User Fields

Line	User Field1	User Field2	User Field3	User Field4	User Field5	User Field6	User Field7	User Field8	User Field9	User Field10

ERC Review Details | DR Request Summary | DR Result Details | **Request Appeal**

ERC Completed Date: 01/31/2022    Date of Error Notification: 12/30/2021

**Review Status**

START DATE: 12/15/2021    REVIEW STATUS: IN PROCESS

**Review History**

**LEVEL: APPROVED FOR SUD    STATUS: COMPLETED**

**Summary**

Completed Date	12/15/2021
----------------	------------

**Payment Information**

Paid FMAP Rate:	89.95
Total ER Claim Payment in Error:	\$308.98
Federal Error Amount:	\$277.93
State Error Amount:	\$31.05

**Findings**

Finding Code:	ER6 - Should have been enrolled in a different program (i.e., Medicaid or CHIP)
Qualifier:	Income incorrectly included
Error Amount:	\$308.98

**Action:** Click on the **Request Appeal** tab to go to the page where you can enter your reason for requesting an appeal.

# Errors - Eligibility Appeal Pending

- Check Eligibility reviews pending appeal by choosing Pending under the Errors/Eligibility/Appeal menu.

The screenshot displays a web application interface with a navigation menu at the top. The 'ERRORS' menu is expanded, showing sub-menus: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ADVANCE ERROR NOTICE, DIFFERENCE RESOLUTION, APPEAL, AVAILABLE, PENDING (highlighted with a red box), and RESULTS. The 'APPEAL' sub-menu is also expanded, showing 'PENDING' and 'RESULTS'. The main content area features a section titled 'ER Reviews Pending Appeal' with a description: 'The grid below shows all reviews, for which a... processed by CMS Appeal Panel.' Below this is a search filter section with dropdowns for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), and a 'Find' button. A table header is visible with columns: PERM ID, State Claim ID, Source Location, YTD ERRORS, Appeal Requested Date, and Pending Days. The table currently shows 'No records to view'.

# Errors - Eligibility Appeal Results

- Review final eligibility appeals by choosing Results under the Errors/Eligibility/Appeal menu.

The screenshot displays a web application interface with a navigation menu at the top. The menu items are: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'ERRORS' menu is expanded, showing a list of options: DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, ADVANCE ERROR NOTICE, ERROR RATE, DIFFERENCE RESOLUTION, APPEAL, AVAILABLE, YTD ERRORS, PENDING, and RESULTS. The 'RESULTS' option is highlighted with a red box. Below the navigation menu, there is a section titled 'ER Reviews Appeal Completed' with a subtitle 'The grid below shows all reviews completed'. Below this, there is a search filter with dropdown menus for Year (2026), Quarter (ALL), Program (ALL), and Category (ALL), and a 'Find' button. At the bottom, there is a table header with columns for PERM ID, State Claim ID, and Error Code. The 'Columns' and 'Excel' options are visible in the bottom left corner.

Year	Quarter	Program	Category	Find
2026	ALL	ALL	ALL	Find

PERM ID	State Claim ID	Error Code









# Errors - Error Rate


- To access Error Rate Documents, click on the links to open the files you would like to review in the Download column.

The screenshot displays the 'Error Rate Documents' interface. On the left is a navigation menu with the following items: ERRORS, REPORTS, DATA PROCESSING, MEDICAL REVIEW, ELIGIBILITY, and ERROR RATE (highlighted with a red box). A red arrow points from the 'ERROR RATE' menu item to the 'Year' dropdown in the main content area. The main content area has a title 'Error Rate Documents' and a search form with a 'Year' dropdown set to '2024' and a 'Find' button. Below this is a section titled 'Error Rate Hawaii FY2024' containing a table with a 'Description' column and a download icon column. The first row, '2024 CHIP Cycle Summary Report', has its download icon highlighted with a red box. A 'Columns' settings icon is visible at the bottom left of the table area.

Year	Action
2024	<a href="#">Find</a>

### Error Rate Hawaii FY2024

Description	
2024 CHIP Cycle Summary Report	
2024 CHIP Error Notification	
2024 Medicaid Cycle Summary Report	
2024 Medicaid Error Notification	

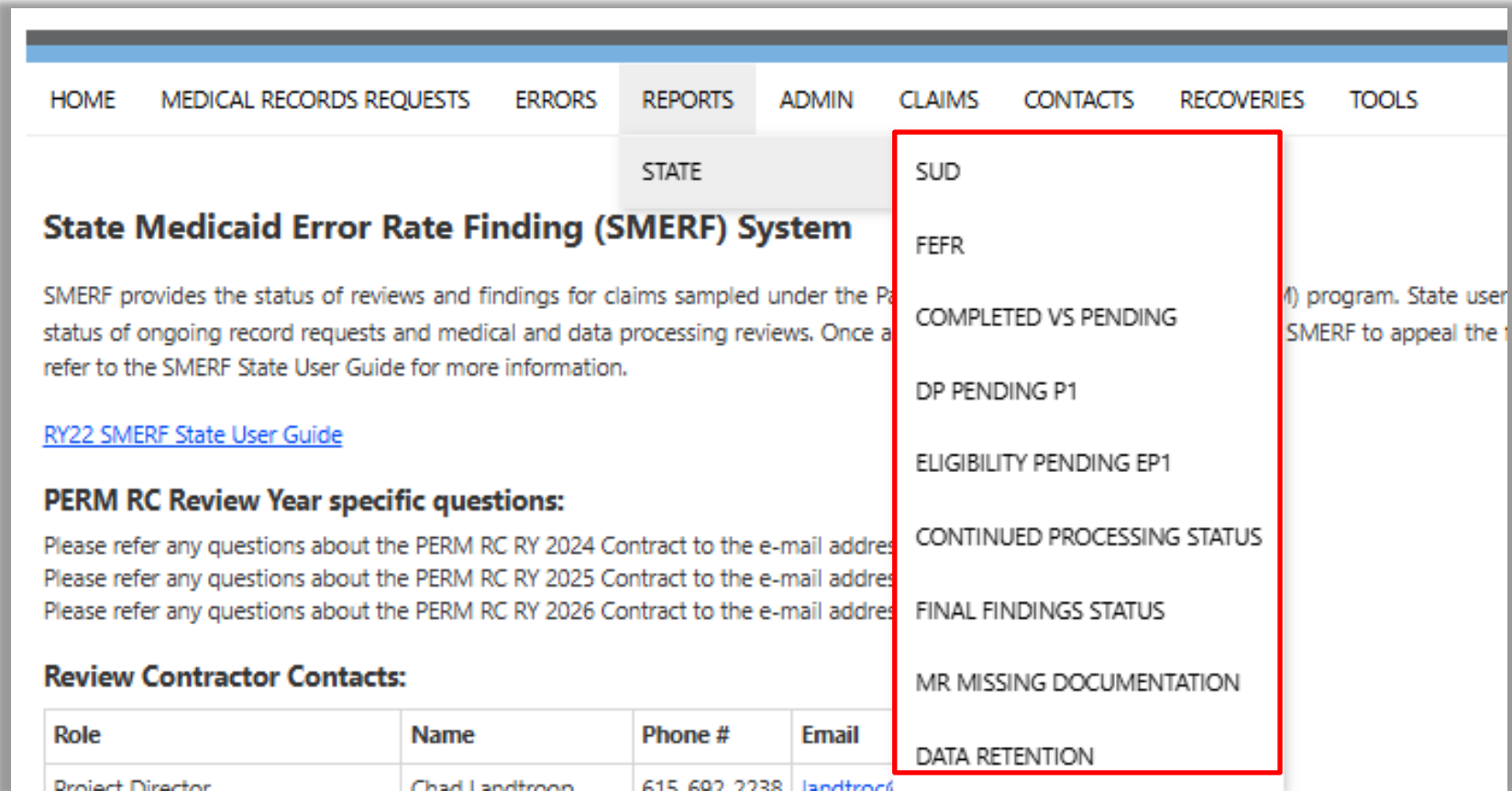
 Columns

# Reports



# Reports in SMERF

- Numerous reports are available to state users in SMERF. Most SMERF reports can be exported in Excel, Word, or PDF formats by clicking the “Save” icon.
- Users can also click “Export to Excel” to export many reports. Choosing “Export to Excel” allows you to select the columns to export to Excel.



The screenshot displays the SMERF system interface. At the top, there is a navigation bar with the following menu items: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, ADMIN, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'REPORTS' menu is currently selected, and a dropdown menu is visible, listing the following report categories: SUD, FEFR, COMPLETED VS PENDING, DP PENDING P1, ELIGIBILITY PENDING EP1, CONTINUED PROCESSING STATUS, FINAL FINDINGS STATUS, MR MISSING DOCUMENTATION, and DATA RETENTION. Below the navigation bar, the main content area is titled 'State Medicaid Error Rate Finding (SMERF) System'. It includes a brief description of the system's purpose and a link to the 'RY22 SMERF State User Guide'. Below this, there is a section for 'PERM RC Review Year specific questions:' with instructions on where to direct questions for different contract years (2024, 2025, 2026). At the bottom, there is a section for 'Review Contractor Contacts:' which includes a table with columns for Role, Name, Phone #, and Email.

Role	Name	Phone #	Email
Project Director	Chad Landtroop	615-692-2238	landtroo@...

# Reports - State DP Pending P1

- For a list of all claims with a P1 (pending information) DP finding, choose DP Pending P1 under the Reports/State menu.

The screenshot shows a navigation menu with 'REPORTS' selected. A dropdown menu is open under 'STATE', listing options: SUD, FEFR, COMPLETED VS PENDING, **DP PENDING P1** (highlighted with a red box), and ELIGIBILITY PENDING EP1. Below the menu, there is a 'Data Processing Pending by State' section with a 'Year' dropdown set to '2025' and a 'Find' button.

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### FY2025 Data Processing Pending by State

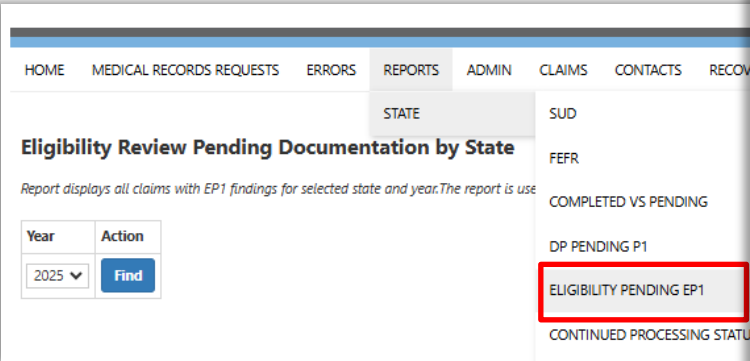
Selected Criteria: Year: 2025 - State: \_\_\_\_\_

State: \_\_\_\_\_

PERM ID	STATE CLAIM ID	SAMP LEVEL	CLM CAT.	PRGM	SOURCE	REVIEWER	DO\$ FROM	DO\$ TO	SOURCE LOCATION	DOCUMENTS STATUS	DOCUMENTS REVIEWED DATE	
			08	Medicaid			06/09/2024	06/09/2024		No Docs Received		
BILLING PROVIDER:								BILLING PROVIDER NUMBER:				
SERVICE PROVIDER:								SERVICE PROVIDER:				
REFERRING PROVIDER:								REFERRING PROVIDER NUMBER:				
QUALIFIER		COMMENTS				DUE DATE	PENDING DAYS	LAST UPDATED DATE				
Missing or discrepant recipient information		Entire Claim: Please provide information to support beneficiary's aid category and eligibility in effect for the date of service of 06/09/2024.				1/24/2025	0-14	1/6/2025				
PERM ID	STATE CLAIM ID	SAMP LEVEL	CLM CAT.	PRGM	SOURCE	REVIEWER	DO\$ FROM	DO\$ TO	SOURCE LOCATION	DOCUMENTS STATUS	DOCUMENTS REVIEWED DATE	
			08	Medicaid			06/05/2024	06/05/2024		No Docs Received		
BILLING PROVIDER:								BILLING PROVIDER NUMBER:				
SERVICE PROVIDER:								SERVICE PROVIDER:				
REFERRING PROVIDER:								REFERRING PROVIDER NUMBER:				
QUALIFIER		COMMENTS				DUE DATE	PENDING DAYS	LAST UPDATED DATE				
Provider Enrollment - Billing						1/24/2025	0-14	1/10/2025				

# Reports - State Eligibility Pending EP1

- To review all claims with an EP1 (pending information) ER finding, click on State and then Eligibility Pending EP1 under the Reports menu.



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### FY2025 Eligibility Review Pending by State

Selected Criteria: Year: 2025 - State:

State - -----

PERM ID	STATE CLAIM ID	SAMPLING LEVEL	PROGRAM	SOURCE	DO \$ FROM	DO \$ TO
<a href="#">C</a>		L	CHIP	1	11/19/2023	11/19/2023
<b>QUALIFIER</b>		<b>COMMENTS</b>			<b>DUE DATE</b>	<b>PENDING DAY\$</b>
Other Income		Please, provide the documentation used to verify the household's unearned income in the amount of \$150.00 at the 9/20/2023 determination.			2/9/2025	0-14
Health Insurance		Please, provide verification of beneficiary's health insurance used at the time of 9/9/2023 determination. The 8/8/2023 renewal used at the time of the 9/9/2023 determination reports that the beneficiary has other health insurance.			2/9/2025	0-14
PERM ID	STATE CLAIM ID	SAMPLING LEVEL	PROGRAM	SOURCE	DO \$ FROM	DO \$ TO
<a href="#">C</a>		H	CHIP	1	01/23/2024	02/14/2024
<b>QUALIFIER</b>		<b>COMMENTS</b>			<b>DUE DATE</b>	<b>PENDING DAY\$</b>
Application/Renewal Form		Please provide a copy of the wav. file for the beneficiary's application dated 1/23/2024.			2/9/2025	0-14

# Reports - State SUD

- Click on Current or Archive under the Reports/State/SUD menu to review a state SUD report.

HOME MEDICAL RECORDS REQUESTS ERRORS REPORTS ADMIN CLAIMS CONTACTS RECOVERIES TOOLS

STATE SUD

**State Medicaid Error Rate Finding (SMERF) System**

SMERF provides the status of reviews and findings for claims sampled under the Permian Basin (PERM) program. State users can obtain the status of ongoing record requests and medical and data processing reviews. Once a finding is identified, users can refer to the SMERF State User Guide for more information.

[RY22 SMERF State User Guide](#)

**PERM RC Review Year specific questions:**

Please refer any questions about the PERM RC RY 2024 Contract to the e-mail address: [permrc@perc.state.tx.us](#)  
Please refer any questions about the PERM RC RY 2025 Contract to the e-mail address: [permrc@perc.state.tx.us](#)  
Please refer any questions about the PERM RC RY 2026 Contract to the e-mail address: [permrc@perc.state.tx.us](#)

**Review Contractor Contacts:**

FEFR  
COMPLETED VS PENDING  
DP PENDING P1  
ELIGIBILITY PENDING EP1  
FINAL FINDINGS STATUS  
MR MISSING DOCUMENTATION  
DATA RETENTION

CURRENT  
ARCHIVE

# Reports - State SUD, continued

Export to Excel

1 of 2 ? Find | Next

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## PERM Year-to-Date Data Processing Sampling Unit Disposition Report

Results/Outcome for the state of

Program: CHIP

Perm ID	State Claim ID	Claim Category	State Name	Quarter	Sampling Level	Amount Paid	Source Location
		02		1	Entire Claim	\$7,008.98	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		08		1	Line #1	\$4,418.87	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		01		1	Entire Claim	\$104,664.96	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		08		1	Line #1	\$47,603.96	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		08		1	Line #1	\$25,658.40	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		08		1	Line #1	\$20,921.63	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		08		1	Line #1	\$19,925.48	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		08		1	Line #1	\$18,607.78	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		08		1	Line #1	\$14,557.41	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	
		08		1	Line #1	\$13,268.90	EDW
Finding Code: C1			Overpayment:	\$0.00	Underpayment:	\$0.00	



# Reports - State SUD Current/Archived

- Choose the report(s) to download - DP, MR, or ER.
- For the current SUD, click View to download the report (left image).
- For an archived SUD, click the paper icon to download the report (right image).

### Sampling Unit Disposition Reports

Year: 2024 Find

Description	Action
There is no current DP Sampling Unit Disposition Report	
Year-to-Date DP Sampling Unit Disposition Report	<a href="#">View</a>

### Medical Review Current Sampling Unit Disposition Reports

Description	Action
Current Medical Review Sampling Unit Disposition Report	
Year-to-Date Medical Review Sampling Unit Disposition Report File Type	

### Eligibility Review Current Sampling Unit Disposition Reports

Description	Action
Current Eligibility Review Sampling Unit Disposition Report	
Year-to-Date Eligibility Review Sampling Unit Disposition Report File Type	<a href="#">View</a>

#### Data Processing Archived Sampling Unit Disposition Reports

Report Date	Description	Claim Count	Action
4/28/2020	DP Sampling Unit Disposition Report	52	
3/14/2020	DP Sampling Unit Disposition Report	68	
2/28/2020	DP Sampling Unit Disposition Report	3	
2/14/2020	DP Sampling Unit Disposition Report	420	
1/29/2020	DP Sampling Unit Disposition Report	702	
1/14/2020	DP Sampling Unit Disposition Report	165	
12/29/2019	DP Sampling Unit Disposition Report	260	
12/15/2019	DP Sampling Unit Disposition Report	24	
11/29/2019	DP Sampling Unit Disposition Report	16	
11/14/2019	DP Sampling Unit Disposition Report	101	

Columns | Page 1 of 2

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#### Medical Review Archived Sampling Unit Disposition Reports

Report Date	Description	Claim Count	Action
7/28/2020	Medical Review Sampling Unit Disposition Report	1	
7/14/2020	Medical Review Sampling Unit Disposition Report	1	
4/23/2020	Medical Review Sampling Unit Disposition Report	46	
4/23/2020	Medical Review Sampling Unit Disposition Report	22	
3/14/2020	Medical Review Sampling Unit Disposition Report	59	
2/28/2020	Medical Review Sampling Unit Disposition Report	61	
2/14/2020	Medical Review Sampling Unit Disposition Report	116	
1/29/2020	Medical Review Sampling Unit Disposition Report	147	
1/14/2020	Medical Review Sampling Unit Disposition Report	50	
12/29/2019	Medical Review Sampling Unit Disposition Report	130	

Columns | Page 1 of 3

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#### Eligibility Review Archived Sampling Unit Disposition Reports

Report Date	Description	Claim Count	Action
4/28/2020	Eligibility Review Sampling Unit Disposition Report	93	
3/14/2020	Eligibility Review Sampling Unit Disposition Report	146	

# Reports - State Completed vs Pending

- To review all claims in SMERF as well as their current status, click on Completed VS Pending on the Reports/State menu.

Session expires in: 15 minutes

HOME MEDICAL RECORDS REQUESTS ERRORS **REPORTS** ADMIN CLAIMS CONTACTS RECOVERIES TOOLS

STATE

- SUD
- FEFR
- COMPLETED VS PENDING**
- DP PENDING P1
- ELIGIBILITY PENDING EP1
- FINAL FINDINGS STATUS
- MR MISSING DOCUMENTATION
- DATA RETENTION

### Completed vs. Pending

Shows all claims in the system and their current status. Claims that were not reported are considered pending.

Year: 2025 Action: Find

Export to Excel

Report generated on 02/05/2025

ICN	PERM ID	Qty	Claim Category	Program Name	Sampled Line	Medicare Crossover	Reporting Provider NPI	Performing Provider Number	Performing Provider Name	Performing Provider NPI	Amount Paid	Ad Inc	DP Findir Code	DP Reasc	DP Over	DP Unde
		1	01	CHIP	Entire Claim	0					\$ 20,814.89		C1		\$ 0.00	\$ 0.00
		1	08	CHIP	Entire Claim	0					\$ 0.00	Y	C1		\$ 0.00	\$ 0.00
		1	01	CHIP	Entire Claim	0					\$ 6,332.22		C1		\$ 0.00	\$ 0.00
		1	08	CHIP	Entire Claim	0					\$ 6,939.89		C1		\$ 0.00	\$ 0.00
		1	08	CHIP	Entire Claim	0					\$ 0.00	Y	C1		\$ 0.00	\$ 0.00

# Reports – MR Missing Documentation

- This new report provides the state with a tool to monitor MR missing documentation errors. This report reflects the current listing of claims cited with a MR1 and MR2 error.

**MR Missing Documentation Errors (MR1/MR2)**  
*Provides states and the review contractor a listing of current MR1/MR2 errors with key information.*

Year	Quarter	Action
2024	ALL	<b>Find</b>

**MR Missing Documentation Errors (MR1/MR2)**  
*Provides states and the review contractor a listing of current MR1/MR2 errors with key information.*

Selected Criteria: Year: 2024 - Stat

**Export to Excel**

1 of 20 | 100%

**Excel**  
PDF  
Word

**Summary**

Error Code	Number of Errors	Error Amount
MR1	57	\$194,100.55
MR2	63	\$177,698.32
<b>Total</b>	<b>120</b>	<b>\$371,798.87</b>

**Details**

Perm ID	State Claim ID	Category Identifier	Error Amount	Date Paid	SUD Date
		08	\$25,077.52	12/14/2022	10/15/2023
<b>MR1</b>	Primary Qualifier	Provider did not respond to the request for records.			
	Billing Provide				
	Phon				
	MR Point of Contac				
	Phon				

# Reports - State FEFR

- Access the FEFR report by choosing FEFR on the Reports/State menu and clicking the link to the FEFR for review.

HOME MEDICAL RECORDS REQUESTS ERRORS REPORTS ADMIN CLAIMS CONTACTS RECOVERIES TO

STATE

SUD

**FEFR**

COMPLETED VS PENDING

DP PENDING P1

ELIGIBILITY PENDING EP1

CONTINUED PROCESSING STATUS

FINAL FINDINGS STATUS

MR MISSING DOCUMENTATION

Final Errors for Recoveries

Year Action

2023 Find

End of Cycle Final Errors for Recovery Report

Report/Letter Date	Description
1/17/2024	End of Cycle Errors for Recovery Report

Monthly Final Errors for Recovery Reports

Report/Letter Date	Description
11/20/2023	Final Errors for Recovery Report

View 1 - 1 of 1

Export to Excel

1 of 6 100% Find | Next

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### End of Cycle Errors for Recovery Report

End of Cycle Errors for the State of CHIP

State Claim ID	Perm ID	Program	Qtr	Claim Cat.	Amount Paid	DP Finding Code	DP Over-payment	DP Under-payment	MR Finding Code	MR Over-payment	MR Under-payment	Should Have Been Paid	FMAP Rate	Federal Error Amount	Over-payments	Under-payments	Provider Name	FEFR Date
		C	1	05	\$24.52		\$0.00	\$0.00	MR1	\$24.52	\$0.00	\$0.00	83.78	\$20.54	\$24.52	\$0.00		11/21/2023
		C	2	14	\$6,000.00	DP10	\$6,000.00	\$0.00	N/A	\$0.00	\$0.00	\$0.00	83.87	\$5,032.20	\$6,000.00	\$0.00		11/21/2023

# Reports - State Final Findings Status

- To review your state's Final Findings Status Report, click Final Findings Status under the Reports/State menu and choose Review Type DP, MR, or ER.

The screenshot shows a web application interface with a navigation menu at the top. The menu items are: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'REPORTS' menu is expanded, showing a sub-menu with the following items: STATE, SUD, FEFR, COMPLETED VS PENDING, DP PENDING P1, ELIGIBILITY PENDING EP1, CONTINUED PROCESSING STATUS, and FINAL FINDINGS STATUS. The 'FINAL FINDINGS STATUS' item is highlighted with a red box. Below the navigation menu, the 'Final Findings Status Report' page is visible. It has a title 'Final Findings Status Report' and a description: 'Selects all claims that went through continued processing in a given cycle. Lists the findings that are the current highest finding for the review.' Below the description, there is a form with three columns: 'Year', 'Review Type', and 'Action'. The 'Year' column has a dropdown menu with '2026' selected. The 'Review Type' column has a dropdown menu with 'DP' selected. The 'Action' column has a blue 'Find' button.

Year	Review Type	Action
2026	DP	Find

# Contacts



# Searching for State Contacts

- To view state PERM contacts in SMERF, choose Search under the Contacts menu.

The screenshot shows the SMERF system interface. At the top, there is a navigation menu with options: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, CLAIMS, CONTACTS, RECOVERIES, and TOOLS. The 'CONTACTS' menu is open, and the 'SEARCH' option is highlighted with a red box. Below the menu, there is a 'PERM Contacts' section with a 'NEW' button. A descriptive paragraph states: "The purpose of the contact module is to supply the information needed by the SMERF system to notify states through emails about the status of PERM reviews. In addition, this module will allow states to independently make changes, deletions or additions to their State's contacts for those staff that they want copied on SMERF system emails". Below this is a table of contacts for Maxwell Smart.

Name	Email	Organization	Roles	Status	Edit
Maxwell Smart	baruas@nciinc.com	State of California	CHIP: Eligibility Lead, Primary ER Medicaid: Eligibility Lead, Primary ER	ACTIVE	<a href="#">Edit</a>
	baruas@nciinc.com	State of California		ACTIVE	<a href="#">Edit</a>
	baruas@nciinc.com	State of California	CHIP: Primary DP, Primary MR, Eligibility Lead, Primary ER Medicaid: Primary DP, Primary MR, Eligibility Lead, Primary ER	ACTIVE	<a href="#">Edit</a>
	baruas@nciinc.com	State of California	Medicaid: Director	ACTIVE	<a href="#">Edit</a>
	baruas@nciinc.com	State of California	CHIP: Primary DP, Primary MR, Eligibility Lead, Primary ER Medicaid: Primary DP, Primary MR, Eligibility Lead, Primary ER	ACTIVE	<a href="#">Edit</a>
	baruas@nciinc.com	State of California	CHIP: Secondary DP, Secondary MR, FEFR email Receipt, Secondary SC Perm, Secondary SC Perm	ACTIVE	<a href="#">Edit</a>
	baruas@nciinc.com	State of California	CHIP: Eligibility Lead, Primary ER Medicaid: Eligibility Lead, Primary ER	ACTIVE	<a href="#">Edit</a>

- Click the Edit link to edit or deactivate state contacts. From the contact detail screen, choose the Edit Contact or Deactivate Contact buttons to make changes.

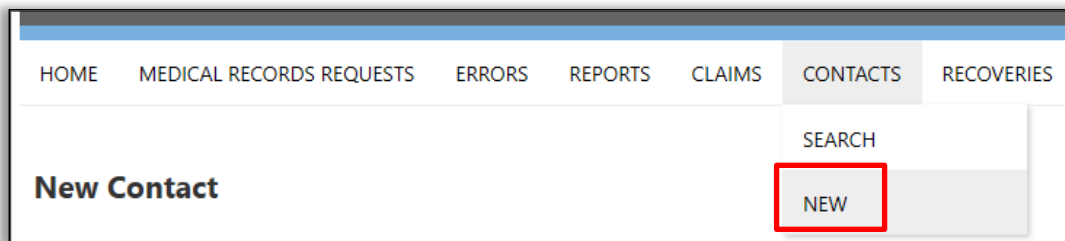
The screenshot shows the contact detail screen for Maxwell Smart. The contact information is as follows:

- Organization:** State of California
- Address 1:** 1501 Capitol Ave
- Address 2:**
- City:** Sacramento
- State:** California
- Zip:** 95814
- Phone:**
- Extension:**
- Fax:**
- Email:** [baruas@nciinc.com](mailto:baruas@nciinc.com)
- Agency:** Department of Health Care Services
- Position:** Eligibility
- Medicaid:** ER Primary, Eligibility Lead
- CHIP:** ER Primary, Eligibility Lead
- Receives Final Errors for Recoveries Emails:** No

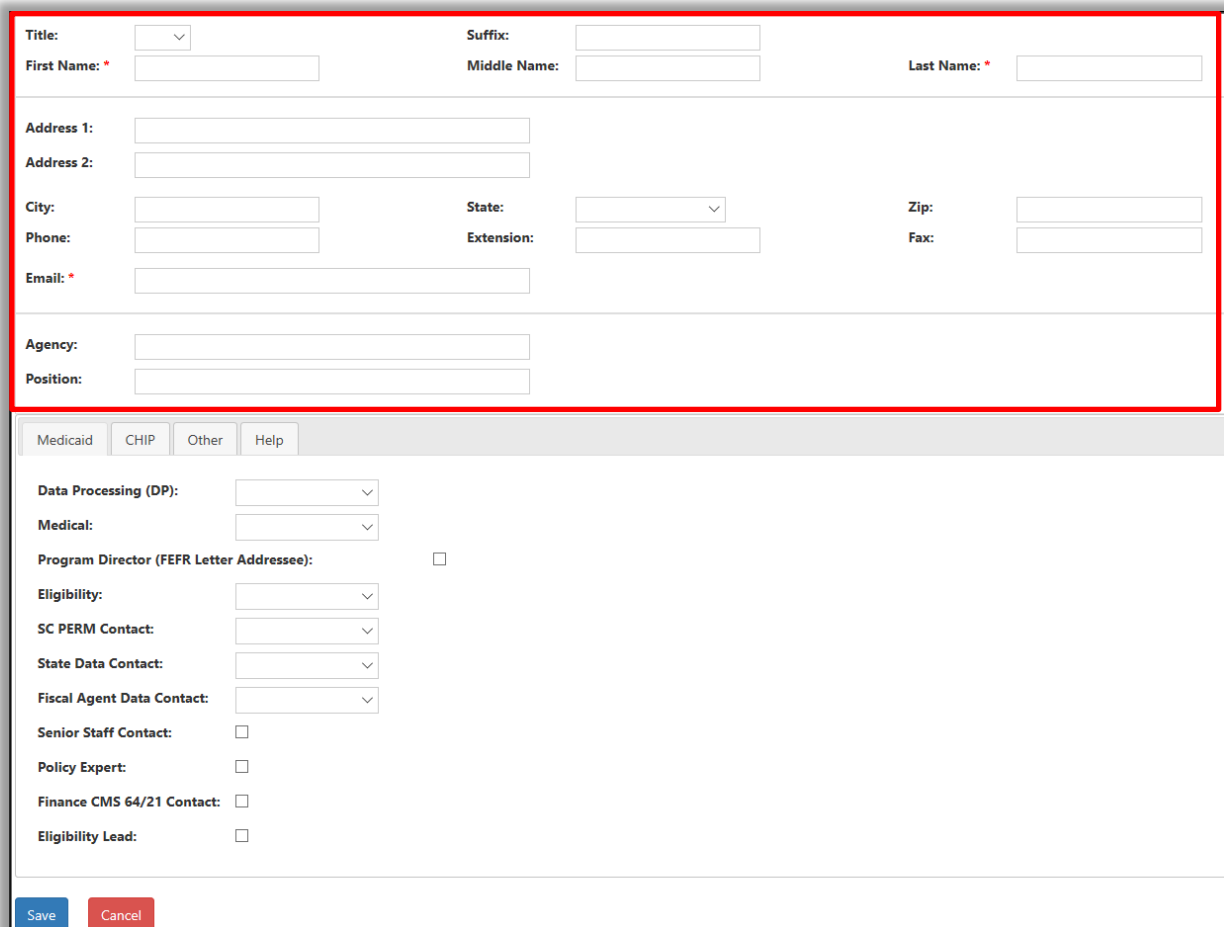
At the bottom of the screen, there are three buttons: 'Edit Contact' (highlighted with a red box), 'Deactivate Contact' (highlighted with a red box), and 'Back to Search'.

# State Contact Information

- To add a new state contact, choose New from the Contacts menu.
- Enter the state employee's information, including Name, Address, Email, etc.
- Notify your RC Regional Coordinator of any changes so email notifications can be updated as well.



A screenshot of a web application's navigation menu. The menu items are: HOME, MEDICAL RECORDS REQUESTS, ERRORS, REPORTS, CLAIMS, CONTACTS, and RECOVERIES. The 'CONTACTS' menu item is highlighted. Below it, a dropdown menu is visible with the options 'SEARCH' and 'NEW'. The 'NEW' option is highlighted with a red rectangular box.



A screenshot of a web application's 'New Contact' form. The form is enclosed in a red border. It contains the following fields and options:

- Title:
- Suffix:
- First Name: \*
- Middle Name:
- Last Name: \*
- Address 1:
- Address 2:
- City:
- State:
- Zip:
- Phone:
- Extension:
- Fax:
- Email: \*
- Agency:
- Position:

Below the form, there are tabs for 'Medicaid', 'CHIP', 'Other', and 'Help'. The 'Medicaid' tab is selected. Below the tabs, there are several dropdown menus and checkboxes:

- Data Processing (DP):
- Medical:
- Program Director (FEFR Letter Addressee):
- Eligibility:
- SC PERM Contact:
- State Data Contact:
- Fiscal Agent Data Contact:
- Senior Staff Contact:
- Policy Expert:
- Finance CMS 64/21 Contact:
- Eligibility Lead:

At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.



# State Contact Roles and Notifications

- Use the Medicaid, CHIP, and Other tabs to specify the role of the user and whether the user is a primary or secondary contact for each field. This will dictate the correspondence the user receives from the RC. The Help tab provides the list of roles in SMERF and the notifications users with these roles can expect to receive. Click Save after changes are complete.

Medicaid Tab

The screenshot shows the 'Medicaid Tab' of a user profile configuration form. The 'Medicaid' tab is selected and highlighted with a red box. The form includes a 'Position' field at the top, followed by four tabs: 'Medicaid', 'CHIP', 'Other', and 'Help'. Below the tabs are several fields with dropdown menus and checkboxes: 'Data Processing (DP):', 'Medical:', 'Program Director (FEFR Letter Addressee):' (with a checkbox), 'Eligibility:', 'SC PERM Contact:', 'State Data Contact:', 'Fiscal Agent Data Contact:', 'Senior Staff Contact:', 'Policy Expert:', 'Finance CMS 64/21 Contact:', and 'Eligibility Lead:'. At the bottom, there are 'Save' and 'Cancel' buttons.

CHIP Tab

The screenshot shows the 'CHIP Tab' of a user profile configuration form. The 'CHIP' tab is selected and highlighted with a red box. The form structure is identical to the Medicaid tab, with a 'Position' field, four tabs ('Medicaid', 'CHIP', 'Other', 'Help'), and various dropdown and checkbox fields. 'Save' and 'Cancel' buttons are at the bottom.

Other Tab

The screenshot shows the 'Other Tab' of a user profile configuration form. The 'Other' tab is selected and highlighted with a red box. This tab features a single checkbox labeled 'Receives Final Errors for Recoveries Emails:'. Below the checkbox are 'Save' and 'Cancel' buttons.

Help Tab

The screenshot shows the 'Help Tab' of a user profile configuration form. The 'Help' tab is selected and highlighted with a red dashed box. The tab displays a list of roles and their associated notifications. The roles are categorized into 'CMS Federal', 'CMS Regional', 'Director', 'DP Review Contractor', 'Eligibility Review Contractor', 'FEFR email Recipient', 'Primary DP', 'Primary ER', 'Primary MR', and 'Review Contractor'. Below these categories, there are sub-sections for 'Recipient Type: Cc' and 'Recipient Type: To', each listing specific notification types.

Role	Recipient Type: Cc	Recipient Type: To
CMS Federal	DP DR Results	DP DR Request
CMS Regional	DP Appeal Result	
Director	Data Processing Sampling Unit Disposition Report	
DP Review Contractor	DP Advance Error Notification	
Eligibility Review Contractor	DP Appeal Receipt	
FEFR email Recipient	Pending Information Notification	
Primary DP		
Primary ER		
Primary MR		
Review Contractor		

**Note: Each state must have at least one primary ER, primary DP, and primary MR contact in order to receive PERM alerts.**

# Contact Us

Name	Contact
SMERF Accounts Mailbox for SMER/Kiteworks new user access requests, password resets, assistance with SMERF troubleshooting or login issues.	<a href="mailto:SMERFaccounts@empower.ai">SMERFaccounts@empower.ai</a>
PERM Customer Service for SMERF password resets.	1-800-393-3068
PERM RC Management Mailbox.	<a href="mailto:PERMRC_2026@empower.ai">PERMRC_2026@empower.ai</a>
PERM RC Documentation Mailbox. PHI/PII should be transmitted via Kiteworks.	<a href="mailto:PERMRC_docs@empower.ai">PERMRC_docs@empower.ai</a>
PERM RC Secure File Transfer Protocol (SFTP) Kiteworks	<a href="https://securefiles.admedcorp.com">https://securefiles.admedcorp.com</a>

# SMERF System Overview

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**Thank you for participating!**