

# Severe Disabling Mental Illness (SDMI) Waiver

Program updates

Monday, Noon, October 27, 2025



DEPARTMENT OF  
**PUBLIC HEALTH &  
HUMAN SERVICES**

# Agenda

Surveillance Utilization Review Section (SURS) Reviews

Provider Education Document

Update on required NPI's on provider enrollments

General provider responsibilities

1. Medicaid policies
2. waiver policies
3. Timely filing requirements
4. Timely audits/reviews
5. Rate updates



# Surveillance Utilization Review Section (SURS)

## Overview for the SDMI Monthly meeting

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Surveillance Utilization Review Section Supervisor  
Office of Inspector General



DEPARTMENT OF  
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October 27, 2025

# What is SURS?

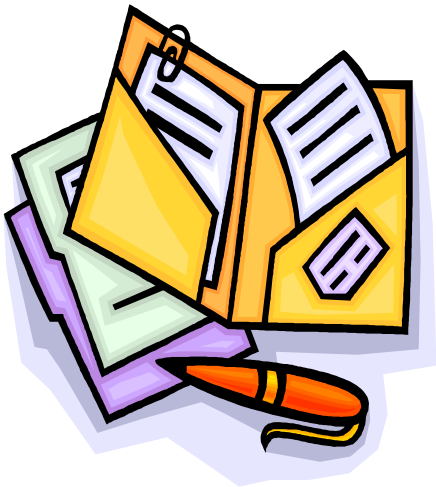
**Surveillance Utilization Review Section (SURS) is a federally mandated program. [42 CFR, Part 456.3]**

The program maintains a strong commitment to assure that the right provider is receiving the right payment for the right services at the right time. We identify potential fraud, waste and abuse to ensure that State and Federal monies are spent appropriately.



# The SURS unit accomplishes this by:

- Performing retrospective reviews
  - Educating Providers
  - Recovering identified overpayments



# The Medicaid Processing System

- Claims processing System
  - Includes edits to help identify billing errors
- Some claims are paid in error
  - Due to incorrect billing
  - System complications/errors
- ALL paid claims are subject to retrospective review
  - Including claims that are prior authorized

**REJECTED  
INSURANCE  
CLAIM**



- Overpayment Recovery



SURS can recover if it discovers that the provider was not entitled to payment for any reason.

[ARM 37.85.406 (9) and (10)]

# What does SURS do?

- Claims review
  - Our team reviews the billed claims to Montana Medicaid. This is to ensure compliance with all applicable state and federal rules and regulations.
  - Fraud, Waste and Abuse
    - Our team is looking to make sure everything matches, and that the extent and nature of the service is documented based on the rules and regulations for that service.
- Records review
  - Our team reads the documentation supplied by the providers to substantiate the services they have billed.



# Resources

- Documentation for Medical Record Training
  - <https://www.youtube.com/watch?v=dgcXVb3LQFM>
- Administrative Rules of Montana (ARMs)
  - <http://mtrules.org>
- General Information for Providers Manual
  - <http://medicaidprovider.mt.gov/providertype>
- Federal Register
  - Vol. 65, No. 194 / Thursday, October 5, 2000 / Notices pg. 59440
    - <https://www.gpo.gov/fdsys/pkg/FR-2000-10-05/pdf/FR-2000-10-05.pdf>
- Documentation Matters Toolkit
  - <https://www.cms.gov/medicare/medicaid-coordination/states/documentation-matters-toolkit>
- HEAT Provider Compliance Training
  - <https://oig.hhs.gov/compliance/provider-compliance-training/>
- Program Officer





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The more information  
the better!

# Future Information:

- Upcoming FREE Trainings
  - Documentation from a Reviewer Perspective – November 6, 2025 2pm
  - Surveillance Utilization Review Section Nuts and Bolts – November 13, 2025 at 2pm
- <https://medicaidprovider.mt.gov/Training>
  - Click on the REGISTER FOR TRAINING button, complete the form and select the training you wish to attend.



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# Provider Education Documents

## Updated/current education documents

- ❖ Enrolling provider/info – shared with prospective and newly enrolled providers
  1. Res Hab Providers
  2. Non-Res Hab Providers



# Provider Education Documents

## Resources related to SDMI waiver program

### **SDMI Medicaid Waiver Website:**

#### **[Severe Disabling Mental Illness SDMI Home and Community Based HCBS Waiver Program \(mt.gov\)](#)**

This is our program specific webpage, which provides important links, updates, letters and memos, mental health training links, as well as our approved waiver application. If you access the above link, you can find additional program information such as:

- ❖ **SDMI HCBS Waiver Manual (mt.gov):** SDMI Medicaid Waiver Policy Manual
- ❖ **Residential Habilitation Provider List:** up-to-date list of residential habilitation providers
- ❖ **AWARE SDMI Mobile Directory Contact List:** up-to-date list of AWARE case management staff phone numbers and email addresses

### **Montana HCBS Website:**

#### **[Home and Community Based Service \(mt.gov\)](#)**

This webpage is the central hub for information on the transition to fully compliant HCBS settings. It includes stakeholder communications, changes to the transition plan as it is revised, finalized results of onsite assessments and remediation status.



# Provider Education Documents cont...

## Resources related to SDMI waiver program

- ❖ **Montana Medicaid Provider Website:**

In addition to the Waiver provider requirements listed above, you are also required to comply with the General Montana Medicaid provider rules/policies below:

- ❖ **[Medicaid Provider Website - SDMI](#)**: This site includes links to the provider manuals, Medicaid Rules and Regulations (CFR, MCA and ARM), fee schedules (SDMI), provider notices, as well as other resources)

- ❖ **Electronic Visit Verification (EVV) Website: [Electronic Visit Verification \(mt.gov\)](#)**

This webpage is dedicated to electronic visit verification information. EVV is a technology that automates the gathering of service information by capturing time, attendance and care plan information entered by a home care worker at the point of care. EVV is limited to specific personal care services found here: [EVV Services \(mt.gov\)](#).

- ❖ **Office of Public Assistance Website: [Montana DPHHS - SNAP, TANF, LIHEAP and Health Coverage Assistance Application \(mt.gov\)](#)**

**Montana Public Assistance Helpline 1-888-706-1535**



# Res Hab Provider Education Documents

- ❖ SDMI services must not be provided and cannot be billed when an individual is on the SDMI waiting list.
- ❖ As it is with all SDMI services, residential habilitation services are able to be billed once case management has completed the individual's enrollment into the SDMI program, SDMI waiver Medicaid eligibility is confirmed in the Medicaid billing system (MMIS), and the contracted case management team has provided a prior authorization to the provider.



# Res Hab Provider Education Documents cont...

- ❖ Any proposed changes to residential service settings including adding new settings, expanding existing ones, or constructing new facilities must be submitted to the program's central office for prior review and approval.
- ❖ In addition to SDMI program and the HCBS Settings rules and regulations, your settings are subject to the licensing rules specific to the residential habilitation type you are approved to provide. If there are any changes (e.g. license renewal, license termination, etc.), you are required to report those changes to the SDMI waiver program office. For more information on licensing, please visit [Health Care and Residential Facility Licensure](#)



# Res Hab Provider Education Documents cont...

- ❖ The residential agreement approved at enrollment and any modification to the agreement or addendums must be submitted to the SDMI waiver program office for approval.
- ❖ Room and Board for SDMI waiver members is \$545. Federal rules prohibit the SDMI waiver program from paying Room and Board. The rate for Room and Board is not set by the SDMI program, it is established by The Department of Public Health and Human Services.



# Additional Services

If you are interested in providing additional services, you must make a request through the program by contacting Jennifer Bergmann. The program will review the request and then provide you with confirmation if you are authorized to provide the additional requested service(s).



# Contacts regarding claims/services

## Questions about billing/claim:

- ❖ Please contact your AWARE Inc. case management team first to verify all information on your prior authorization as entered for billing purposes, is correct.
- ❖ If it appears all billing information is entered correctly from the prior authorization and you continue to have questions, please contact Conduent at the following:  
Provider Relations for general claims questions, questions about enrollment, eligibility, Passport, Medicaid, MHSP, HMK pharmacy, eyeglass and dental payments and denials:

### Telephone:

(800) 624-3958 In/Out of state

(406) 442-1837 Helena

IVR (24/7 verify member eligibility, payments, enrollment status etc.) (800) 714-0060

### Email:

MTEnrollment@conduent.com

MTPRHelpdesk@conduent.com



# Contacts regarding claims/services cont...

## **Questions regarding how to provide SDMI services:**

Please refer to and review the SDMI policy manual, and if further clarification is needed, contact the AWARE Inc. case management team.

## **Questions about EVV:**

Please email questions to: [EVVQuestions@mt.gov](mailto:EVVQuestions@mt.gov)



# How to stay informed

- ✓ Sign up for the Claim Jumper\_communications
- ✓ Attend the SDMI Monthly Provider Calls
- ✓ Keep your eyes on the websites for updated information



# Update - required NPI's on provider enrollments

- ❖ Letters went out to providers that had not responded by September 15, 2025 with their NPI. The letter due date with the NPI was October 15, 2025. If you have not responded with your NPI to [HHSMPathTraining@mt.gov](mailto:HHSMPathTraining@mt.gov) please do so immediately.
- ❖ Failure to respond and submit your NPI could potentially result in payment being suspended until compliance is completed.
- ❖ If you have not already obtained a NPI, please go to <https://nppes.cms.hhs.gov/login> website to obtain one.
- ❖ The spreadsheet listing if a NPI is still required for each provider is listed at : <https://medicaidprovider.mt.gov/>
- ❖ Emails were sent to providers who had not responded with their NPI on October 22, 2025.



# General provider responsibilities

- ❖ Medicaid policies
- ❖ Waiver policies
  - be aware and understand applicable general and program specific rules/policies
- ❖ Timely filing requirements – 365 days from date of service
  - Please ensure your claims are submitted timely. If you have any issues with getting the claims processed timely, please reach out to Conduent for assistance.



# General provider responsibilities cont...

## Timely audits/reviews

Mountain Pacific annual review.

- ❖ Providers are required to respond and send documentation.
- ❖ Possible referral to SURS for non-responsive providers

Update contact information with Conduent as soon as possible

### *General Manual, "Changes in Enrollment"*

Changes in address, telephone/fax, name, ownership, legal status, tax ID, or licensure must be submitted in writing to Provider Relations. Faxes are not accepted because the provider's original signature and NPI (healthcare providers) or API (atypical providers) are required. For change of address, providers can use the form on the website; for a physical address change, providers must include a completed W-9 form."

**To avoid payment delays, notify Provider Relations of an address change in advance**



# General provider responsibilities cont...

## Rate updates

- ❖ Completed annually in July.
- ❖ Emails and provider notices are sent.
- ❖ Please ensure you are updating any online templates for claims submission to the new rates as soon as possible.
- ❖ Providers responsibility to submit claim adjustments for any rate increases.



# SDMI Contacts

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# Questions?



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