Updated policies, Non-Medical Transportation, Med Escort, and Medical Transportation within the SDMI Waiver…

September 25, 2025, Noon

DEPARTMENT OF
PUBLIC HEALTH &
HUMAN SERVICES

Rate and Claim Reminders

- SDMI Proposed Fee Schedule rates
- NPIs required on provider enrollment files

SDMI Proposed Fee Schedule rates (email sent July 17th)

The Department has incorporated the proposed fee schedule rate updates into the claims processing system and will use these proposed rates to reimburse providers starting July 1, 2025.

While the final fee schedule has not yet been posted to the Medicaid Provider website, you can use the below link for the proposed rates for reimbursement with claims starting July 1, 2025.

SDMI Proposed Fee Schedule effective July 1, 2025

Medicaid Provider Proposed Fee Schedule page

July 1, 2025, Fee Schedule Updates Provider Notice

NPIs required on provider enrollment files (email sent August 21st)

Who this effort affects:
Presentation for the team number rollout (see: February 2025 Team Number Rollout), Providers were to procure NPIs on the NPPES website, https://nppes.cms.hhs.gov/#/, if they did not already have one.

File will be uploaded with all providers indicating those where we are missing their NPI. Column E on the spreadsheet on the file will be yellow for those who are missing an NPI. The spreadsheet on file is available on the Medicaid Provider Website, https://medicaidprovider.mt.gov/, on the announcements (main page). Going forward, DPHHS will update at least once a week as we get the information back from Providers.

NPIs required on Provider enrollment files cont...

What to do:
If you see that there is information missing for your tax ID, then please send an email to HHSMPathTraining@mt.gov with your Provider ID, Name and the NPI number you would like associated. When all provider IDs under a single tax ID have the NPIs provided, the provider IDs will be added to a batch to have the NPI added to the record(s).

When to do this by:
Please respond by September 15, 2025. Once the NPI is in Optum for all records, the provider is requested to add the additional locations or settings not already enrolled (ex. Self-Direct or Agency Based if one is on file and the other is not and both are relevant). Thank you for your consideration. Reach out to HHSMPathTraining@mt.gov should you have any questions.

Provider Communications

Remember to report
your most current contact information with both Conduent and with the program.

Jennifer Bergmann (jbergmann@mt.gov) is your contact for the SDMI email provider contact list.

Policy Updates

Public Institutions Policy SDMI 160

DEPARTMENT OF PUBLIC HEALTH & HUMAN SERVICES	**Title: SDMI 160** **Section: GENERAL REQUIREMENTS** **Subject: PUBLIC INSTITUTIONS** **Reference: 42 CFR § 435.1009, 435.1010, ARM 37.82.1321** **SDMI Application: (01/28/2024)** **Effective Date: (9/1/2025)** **Supersedes: n/a**

PUBLIC INSTITUTIONS

Medicaid coverage is not available to inmates in public institutions. An inmate is someone who is involuntarily confined to a public institution, including individuals who are awaiting criminal proceedings, penal dispositions or other involuntary detainment determinations. An individual, who is voluntarily residing in a public institution, pending other arrangements, may be eligible for Medicaid. Individuals who are committed to Montana State Hospital or Montana Mental Health Nursing Center are not considered inmates but are also not eligible for Medicaid coverage if over age 21 but not yet age 65.

DEPARTMENT OF PUBLIC HEALTH & HUMAN SERVICES	**Title: SDMI 375** **Section: SERVICE REQUIREMENTS** **Subject: RESIDENTIAL HABILITATION, ADULT GROUP HOME** **Reference: 42 CFR § 441.301, ARM 39.90.454** **SDMI Application: (01/28/2024)** **Effective Date: (09/1/2025)** **Supersedes: SDMI 375 (07/01/2020)**

(2) Adult Group Home must provide these service components:

(a) personal assistance supports or habilitation to meet the specific needs of the member;

(b) homemaker services;

(c) medication management and oversight;

(d) social activities;

(e) personal care;

(f) recreational activities;

(g) medical escort;

(g) non-medical transportation; and

(h) 24-hour on-site awake staff to meet the needs of the member and provide supervision for safety and security.

DEPARTMENT OF PUBLIC HEALTH & HUMAN SERVICES	**Title: SDMI 376** **Section: SERVICE REQUIREMENTS** **Subject: RESIDENTIAL HABILITATION, ASSISTED LIVING** **Reference: 42 CFR § 441.301, ARM 37.90.451** **SDMI Application: (01/28/2024)** **Effective Date: (09/1/2025)** **Supersedes: SDMI 376 (07/01/2020)**

(3) Assisted Living is a bundled service that must include:

(a) personal assistance supports or habilitation to meet the specific needs of the member;

(b) homemaker services;

(c) medication management and oversight;

(d) social activities;

(e) personal care;

(f) recreational activities;

(g) medical escort;

(g) non-medical transportation; and

(h) 24-hour on-site awake staff to meet the needs of the member and provide supervision for safety and security.

DEPARTMENT OF PUBLIC HEALTH & HUMAN SERVICES	**Title: SDMI 377** **Section: SERVICE REQUIREMENTS** **Subject: RESIDENTIAL HABILITATION, ADULT FOSTER CARE** **Reference: 42 CFR § 441.301, ARM 37.90.455** **SDMI Application: (01/28/2024)** **Effective Date: (09/1/2025)** **Supersedes: SDMI 377 (07/01/2020)**

(2) Adult Foster Care must provide these service components:

(a) personal assistance supports or habilitation to meet the specific needs of the member;

(b) homemaker services;

(c) medication management and oversight;

(d) social activities;

(e) personal care;

(f) recreational activities;

(g) medical escort;

(g) non-medical transportation; and

(h) 24-hour on-site awake staff to meet the needs of the member and provide supervision for safety and security.

Transportation and the SDMI Waiver

What is non-medical transportation?

Policy Number:	Subject:
SDMI HCBS 350	Non-Medical Transportation

Definition

Non-Medical Transportation means travel for access to waiver and other community services, activities, and resources as defined in the member's Person-Centered Recovery Plan (PCRP). Medical transportation is available under the State Plan Medicaid Program.

Determination of Need

(1) Member may need Non-Medical Transportation when the member:

(a) does not have a valid driver's license;

(b) does not have a working vehicle available in the household;

(c) is unable to travel or wait for services alone; or

(d) has a physical, cognitive, mental, or developmental limitation.

What is non-medical transportation con't.:

Service Requirements

(1) Non-Medical Transportation may be provided only after volunteer transportation services, Medicaid state plan, or other publicly funded transportation programs have been exhausted or determined in appropriate.

(2) Non-Medical Transportation must be provided in the most cost-effective mode.

(3) Non-Medical Transportation may not be billed separately when included in the bundled rate of the provision of another service.

(4) Non-Medical Transportation is not allowed for transportation to a medical appointment or service except when it is an integral part of the provision of the service.

Additional considerations when authorizing non-medical transportation:

- ARM 37.90.450 HOME AND COMMUNITY-BASED SERVICES FOR ADULTS WITH SEVERE AND DISABLING MENTAL ILLNESS: NONMEDICAL TRANSPORTATION
  - (5) Nonmedical transportation services are available only for the transport of members to and from activities identified in the member's Person-Centered Recovery Plan.

What is Medical Escort?

- Medical escort service provides a member who demonstrates a medical and functional need for assistance from an attendant en route to or at the medical appointment. Medical escort is available when a family member or informal caregiver is unable to accompany the member.

  - Note: Medical escort is not authorized to provide a member with cognitive deficits the use of an attendant to communicate and relay medical information at the medical appointment.

What is Medical Escort Con’t.?:

- Coverage of medical escort is limited to appointments to obtain necessary medical services covered by the Medicaid program. The authorized time is approved to the nearest provider. Nearest providers include providers closest to the member that provide the necessary services or a trip that is prior authorized by Medicaid Transportation (refer to ARM 37.86.2402).

What is third-party liability?

- It is possible for Medicaid beneficiaries to have one or more additional sources of coverage for health care services. Third Party Liability (TPL) refers to the legal obligation of third parties (for example, certain individuals, entities, insurers, or programs) to pay part or all of the expenditures for medical assistance furnished under a Medicaid state plan. By law, all other available third-party resources must meet their legal obligation to pay claims before the Medicaid program pays for the care of an individual eligible for Medicaid. States are required to take all reasonable measures to ascertain the legal liability of third parties to pay for care and services that are available under the Medicaid state plan.

How does CFC/PAS authorize Medical Escort?

- MP will authorize medical escort on the member's CFC/PAS Service Profile by indicating an "A" for authorization of the task "medical escort".
    - Note: If a member does not have medical escort authorized on their Service Profile, they cannot receive the service unless the provider agency approves a temporary authorization for medical escort based on a member's change in condition or circumstance.

How does CFC/PAS authorize Medical Escort Con't.?

DPHHS-SLTC-155
Revised 07/02

PERSONAL ASSISTANCE SERVICES PROFILE

Agency Based CFC

Profile Type: ANNUAL **Span:** 08/02/2021 **To** 08/31/2022

Nurse Reviewer:

Review Date: 08/02/2021 **Plan Facilitator:**

Medicaid ID Num	Consumer Name (Last, First, MI)	Companion Case Name	Relationship

* Level of Impairment 0 Independent 1 Standby 2 Limited Assist 3 Ext. Assist 4 Total Dependence 5 N/A Age App. 6 Unknown

Imp.	Tasks		Days	Comments
3	Bathing	Shower	3	assist with washing body and hair
2	Dress (orthotics, etc.)		5	assist as needed
2	Hygiene	Skin Shave	5	hair care and skin care
2	Transfer		5	assist in/out of shower, on/off furniture
2	Mobility	Cane	5	assist with mobility in home
3	Meal	Reg	5	assist with meal prep, encouraging her to eat
	68 Bi-weekly units ADL			
3	House Cleaning		A	light house cleaning
3	Laundry		A	carry laundry, load machines
3	Shopping		A	assist her with groceries
2	Community Integration		A	She would like to get out and needs assistance due to her TBI and PTSD
	32 Bi-weekly units IADL			
2	Medical Escort		A	
2	Personal Emergency Response System (PERS)		A	
	GRAND TOTAL	**100 Bi-weekly units**		**25 Hours**

How and when can medical escort with waiver transportation mileage be authorized under the SDMI waiver program?

Medical Escort with Waiver Transportation Mileage:

(1) Medicaid Transportation Services must be utilized first. Information pertaining to Medicaid Transportation can be found at: https://dphhs.mt.gov/MontanaHealthcarePrograms/Medicaid/Transportation

(2) Medical transportation mileage through the SDMI program is reimbursement for personal vehicle mileage using non-Medical Transportation, when a behavioral intervention assistant (BIA) or a personal care attendant (PCA) drives a member to obtain a Medicaid reimbursable service. It is only available to reimburse mileage expenditures for local travel that Medicaid Transportation will not cover (15 miles or less roundtrip).

(3) In addition to billing mileage, the BIA or PCA may bill for the time to the appoint, at the appointment, and time from the appointment.

(4) Medical transportation mileage must be tracked on a Mileage and Medical Escort form. Tracking must include odometer readings at the beginning and end of the trip (last three digits of the odometer are acceptable) and the specific destination of the medical appointment with the name of medical provider and location (i.e. address and town).

How and when can medical escort with waiver transportation mileage be authorized under the SDMI waiver program con't.?

- Medical transportation is available for reimbursement through State Plan Medicaid transportation if the mileage cost accumulated during the month exceeds the amount of $5.00 total (which equals 15 miles or more per month).
- SDMI non-medical transportation is available for reimbursement of the medical transportation mileage cost, if the accumulation from the month is less than $5.00 (which equals less than 15 miles) total. As well as delivered by an enrolled SDMI non-medical transportation provider.
- We are evaluating the use of the medical transportation within the SDMI waiver at this time. However, BIA may be able to provide for med escort in certain circumstances and would be decided on a case-by-case basis by program staff at this time.

Scenario #1:

Tracey was previously receiving CFC/PAS, however she is now authorized for BIA due to her behavioral health needs. Tracey requires functional assistance outside of her home and at her medical appointments due to her physical diagnoses. Tracey has an appointment with her primary doctor in two weeks, and the doctor's office is five miles from her home, making it 10 miles round trip. Tracey only has one medical appointment scheduled for the month of September, which will therefore total less than $5.00 (less than 15 miles total) accumulative mileage for the month. Tracey's BIA will provide for her medical escort with waiver transportation to and from her medical appointment and bill the SDMI waiver for the mileage as well as time spent at the appointment, utilizing non-medical transportation.

Scenario #2:

Mark has CFC/PAS and is also authorized for Life Coach service through the SDMI waiver. Mark does not have medical escort authorized through CFC/PAS, as he does not have a medical or functional need for assistance with medical appointments. Mark would like his Life Coach to transport and attend his medical appointment with him, as he gets very overwhelmed and anxious at the doctor.

Life Coaches are not authorized to provide medical escort with waiver transportation through the SDMI waiver program.

Scenario #2 Con't.

However, Mark's Life Coach could assist him in locating the State Plan Medicaid transportation phone number, understanding how much notice he needs to provide to them in order for them to be able to provide him assistance, as well as assisting him in calling to make arrangements for the transportation to his appointment. The Life Coach could also assist to ensure the appointment is marked on his calendar for him to attend, as well as making a list of questions he might like to ask the doctor at his visit etc. Life Coaches are not authorized to provide medical escort with waiver transportation (med escort = attend and/or transport members to medical appts).

Take Aways:

01

MP is the entity responsible for the authorization of medical escort with transportation for CFC/PAS members. State Plan Medicaid transportation is a third-party liability and it should always be utilized first when looking to authorize medical transportation.

02

If a member does not have CFC/PAS and requires assistance with medical escort, if authorized for BIA it can be reviewed on a case-by-case basis by program staff for approval.

03

Life coach cannot provide medical escort with waiver transportation to SDMI members. Life Coaches assist with developing independent living skills to include assisting the member to access community resources, to include State Plan medical transportation for their medical transportation needs.

Questions?