

# Severe and Disabling Mental Illness (SDMI) Waiver

Monthly Provider Meeting  
September 23, 2024, Noon



DEPARTMENT OF  
**PUBLIC HEALTH &  
HUMAN SERVICES**

# SDMI Provider Revalidations

- Check your status by logging into the MPATH portal. Click the radio button on the current enrolled line. Hover over the revalidation tile on the left menu. If you are due for revalidation this will highlight.
  - If you are due for a revalidation, click the revalidation tile, a new pencil icon will appear at the bottom of the workbench. Please complete all information in full and submit.



# HCBS Settings Portal Update

This summer, DPHHS has been implementing a new technology system for Home and Community Based Service (HCBS) providers. The new system is a HCBS settings portal and will be used by DPHHS and HCBS providers to ensure ongoing compliance with the HCBS Settings Rule. The HCBS settings portal will improve the efficiency of HCBS compliance activities by giving providers one portal in which they will complete their self-assessments and communicate with DPHHS on all related settings activities.



# HCBS Settings Portal Update Con't.:

- In Montana, the Settings Rule applies to specific 0208 DD Waiver, Severe Disabling Mental Illness (SDMI) Waiver, Big Sky Waiver (BSW) services to include: Adult Foster Care, Assisted Living Facility, Group Homes, Supported Employment, and Adult Day Care.
- The Community First Choice (CFC) program will have its own distinct method for ensuring compliance with the Settings Rule. Guidance and training specific to CFC provider requirements will be forthcoming.
- For more information on the HCBS settings requirements, please visit the [HCBS Settings website](#)

# HCBS Settings Portal Update Con't.:

## Provider Experience Testing

- The testing with a small group of providers across programs was successfully completed. Thank you to these providers who took the time to test and give constructive feedback on the portal. DPHHS staff continued to work with the vendor on the portal with fine-tuning and testing throughout the summer.



# HCBS Settings Portal Update Con't.:

## Provider Training and Ongoing Support

- We are now moving into this next phase of implementation this month. Provider trainings will consist of the HCBS Settings Rule Statewide Policy training for all HCBS providers and a separate Portal Onboarding Training for a select number of Round 1 providers. These onboarding trainings and ongoing support will also be available to those providers in subsequent rounds. Please keep an eye out for more information and meeting invites.



# HCBS Settings Portal Update Con't.:

## Phased In Roll Out Approach

- DPHHS will roll out the use of the HCBS settings portal using a phased approach throughout FY25. DPHHS has identified providers and specific settings across programs for the Round 1 Roll Out. After completion of the Portal Onboarding Training in September, we anticipate the portal to go-live for these selected settings in October. Round 1 providers will be contacted with more details to follow. Please note, any *new* settings will also be added to the portal after go-live.



# Non-Medical transportation and Medical Escort within the SDMI Waiver:





# What is non-medical transportation?

<b>Policy Number:</b> <i>SDMI HCBS 350</i>	<b>Subject:</b> Non-Medical Transportation
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## 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?

- MPQH 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
<b>68 Bi-weekly units ADL</b>			
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
<b>32 Bi-weekly units IADL</b>			
2	Medical Escort	A	
2	Personal Emergency Response System (PERS)	A	
<b>GRAND TOTAL</b>		<b>100 Bi-weekly units</b>	<b>25 Hours</b>





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>

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- (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 appointment, 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 SDMI 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

MPQH 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 SDMI 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?