



# Montana Healthcare Programs Provider Notice

## January 2, 2025

**Reminder**

### **Mental Health Center and Targeted Case Management (Mental Health) Providers**

### **Documentation Requirements for Targeted Case Managers**

Documentation of Targeted Case Managers' education, other qualifying experience, and ongoing training must be kept in the employee's file both during and post-employment as Mental Health Centers may be required to produce the documentation in future audits.

The minimum qualifications for Targeted Case Managers are outlined in [Administrative Rules of Montana \(ARM\) 37.106.1935 Mental Health Center: Youth and Adolescent and Adult Targeted Case Management](#), which states:

- (2) Each mental health center providing targeted case management program services shall:
  - (a) ensure each targeted case manager is meeting with a supervisor at least once per month, as necessary based on the case manager's documented skills and skill sets such as developing treatment plans, facilitating family or caregivers treatment team meetings, and educating the youth and the youth's family or caregivers about the mental health system. In addition, targeted case managers must have access to clinical consultation through the treatment team meeting;
  - (b) employ or contract with case managers who have the knowledge and skills needed to effectively perform targeted case management duties. Minimum qualifications for a case manager are a bachelor's degree in a human services field with at least one year of full-time experience serving people with mental illnesses. Individuals with other educational backgrounds who, as providers, consumers, or advocates of mental health services have developed the necessary skills, may also be employed as targeted case managers. The mental health center's targeted case management position description must contain equivalency provisions;
  - (c) train the supervisor and program staff in the therapeutic de-escalation of crisis situations to ensure the protection and safety of the clients and staff. The training must include the use of physical and non-physical methods of managing clients and must be updated, at least annually, to ensure the maintenance of necessary skills;
  - (d) develop a written protocol for case managers and supervisors that includes a minimum of 20 hours of initial training, and 20 hours of annual continuing education. Areas of focus should include:
    - (i) competencies in key skill sets such as developing treatment plans, facilitating treatment team meetings, and educating the youth and the youth's family or caregivers about the mental health system; and
    - (ii) training on suicide prevention, including crisis and safety planning.

Documentation of Targeted Case Managers' qualifications for serving persons with developmental disabilities must be maintained by the employer of the case manager in accordance with [ARM 37.86.3606 Case Management Services for Persons with Developmental Disabilities, Provider Requirements](#):

- (4) A case manager must be employed by the Developmental Disabilities program of the department or by a case management provider contracting with the program.
- (5) A case manager must meet the following criteria:

- (a) A case manager, except as otherwise provided for in (5)(b), must:
- (i) have a bachelor's degree in social work or a related field from an accredited college; and
  - (ii) one year experience in developmental disabilities or other human services:
    - (A) if the experience is in a human service other than developmental disabilities, the case manager must have completed at least 40 hours of training in the delivery of services to persons with developmental disabilities under a training curriculum reviewed by the developmental disabilities program of the department within no more than three months of hire or designation as a case manager. ...
- (8) A case manager must participate in a minimum of 20 hours of advanced training in services to persons with developmental disabilities each year under a training curriculum reviewed by the Developmental Disabilities program of the department. On-going documentation of the qualifications of case managers and completions of mandated training must be maintained by the employer of the case manager.

For more information, please access the full rules for [ARM 37.106.1935](#) and [ARM 37.86.3606](#).

## Contact and Website Information

If you have questions, please contact:

- Liz LeLacheur, Medicaid Program Supervisor, Children's Mental Health Bureau (406) 444-7652, email [ELeLacheur@mt.gov](mailto:ELeLacheur@mt.gov)
- Cathy Murphy, Program Support Supervisor, Developmental Disabilities Program, (406) 444-1716, email [CatMurphy@mt.gov](mailto:CatMurphy@mt.gov)
- Ashley Bair, Behavioral Health Supervisor, Treatment Bureau (Adult Behavioral Health/ Substance Use Disorders), (406) 202-9451, email [Ashley.Bair@mt.gov](mailto:Ashley.Bair@mt.gov)

For claims questions or additional information, contact Montana Provider Relations at (800) 624-3958 or (406) 442-1837 or email [Montana Provider Relations Helpdesk](#).

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Visit the [Contact Us page](#) on the Provider Information website for additional DPHHS contact numbers.