

# MT ABLE Committee Meeting

## Agenda

Date: September 10<sup>th</sup>, 2025

Call to Order: Chair, Theresa Baldry

Roll Call:

Public Comment:

Old Business:

- Action item: Review and Approve Agenda
- Action item: Review and Approval of Previous Meeting Notes (July\_25)
- Update on need for new committee members:
  - Active members\*- see Note Kathleen previous meeting minutes
  - News on appointment of Person with a Disability to ABLE Committee
- Discussion ABLE program alternatives other than MT ABLE used by Montanans:
  - Follow up from Michael as to if National program can provide information on accounts held by Montana residents but open in other states.
- Discussion of existing contract - when renewed and length of agreement:
  - Follow up from Michael or legal to clarify who Montana has a contract with and the length of that contract. Is the Montana contract with the National ABLE Alliance Consortium and if so, do we as a state, have input on the financial institution providing services as part of the consortium?
- Discussion of Medicaid Clawback and current practice of DPHHS
  - Sarah Sparks, the third-party liability supervisor with the Quality Assurance update as to change in practice, current process, and why?
  - What the balance is of the state special revenue fund and how those funds are being used
  - Clarification on the language for MCA 53-25-111 (Has DPHHS established procedures for the family of the former designated beneficiary?
  - Michael clarified who Cathy Murphy emails when she becomes aware that an ABLE account holder has passed away and determine how she is made aware of the death.
- Follow up Questions for the state on MCAs:
  - **53-25-109:** "Application fees provided for in subsection (1)(c) must be deposited in the state special revenue fund to the credit of the department for the administration of the Achieving a Better Life Experience program."
  - Where is this account held?
  - How much is available for administration of the Montana ABLE program?
  - How are those funds being used

- **53-25-111:** Provide clarification on the language for this one. Has DPHHS established procedures for the family of the former designated beneficiary?
- Report Kathleen- Ask Lieutenant Governor Juras if she has someone who could look at both 53-25-117 and 53-25-118 to determine whether the wording is appropriate and consistent with federal code.

#### New Business:

Report as to current Montana ABLE account- Michael DPHHS Designee

Sharing ABLE activities attended: webinars, trainings viewed or provided

Discussion requests for assistance or concerns Montana ABLE accounts: New items?

Discuss Montana ABLE program manager, who is the designee?

Discuss future meeting platform

Review MCA 53-25-119 & 53-25-120

Next Meeting Date and Agenda Items: Standing bimonthly meetings on the 2<sup>nd</sup> Wednesday @ 10am November 12<sup>th</sup>, 2025.

\*Lt. Governor Juras explained to Kathleen that even though a committee member's term may have technically expired, the member remains on the committee until resignation.