

SDMI Monthly Provider Call

July 27 2026, noon



DEPARTMENT OF
**PUBLIC HEALTH &
HUMAN SERVICES**

Provider documentation



Life Coach Service Provider Qualifications

Provider Requirements

(1) Life Coaches may be provided by:

- (a) independent living centers;
- (b) personal care entities;
- (c) fiscal management agencies; or
- (d) other entities approved by the department.

(2) Each Life Coach must be individually approved by the department, whether employed by an agency or as an independent provider.

(3) Life Coaches must have at least 8 hours of specialized behavioral health training annually, approved by the department.

Life Coach Service Provider Qualifications

Provider Requirements Continued

(4) The provider may use the following options for specialty mental health training:

(a) use the state approved mental health training
or

(b) submit quality trainings that feature best practices or evidence-based practices to the state for approval.

Recommended Training:

[Free Online Mental Health Courses | Alison](#)

- **Mental Health Support Worker Essentials**
- **Understanding Mental Health and Psychiatric Disorders**
- **Mental Health & Psychosocial Support**

To obtain a certificate from Alison, you must achieve a score of 80% or more in each assessment. We do not expect you to pay for the certificate, a screenshot of the certificate is acceptable.

Provider Requirements

The following requirements are what are outlined in our current waiver application with CMS.

- (1) Be at least 18 years of age;
- (2) Within 30 days of hire receive training in: * abuse reporting, * incident reporting, * client confidentiality, and * any specialty training relating to the need of the member served, as outlined in the plan of care.
- (3) Possess the ability to complete documentation requirements of the program;
- (4) Agree to a state criminal background check;
- (5) Possess a valid driver's license and proof of automobile liability insurance if transporting the member;
- (6) Advocate for the member to assure that the member's rights are protected, and the member's needs and preferences are honored; and
- (7) Complete 8 hours of Mental Health Training

SDMI Life Coach Attestation

The SDMI Life Coach Provider and Service Requirements Attestation is required to be reviewed and signed by all prospective Life Coaches.

SDMI Life Coach Provider and Service Requirements Attestation

Please provide your contact information and check each box for your attestation that you can or will be able to meet the provider and service requirement.



SDMI LIFE COACH PROVIDER AND SERVICE REQUIREMENTS ATTESTATION

Name:

Date:

Phone Number:

Mailing Address:

E-mail Address:

Are you enrolling as an:

City/County in which you would like to provide Life Coach services:

The goal of the SDMI HCBS waiver program is to keep members independent in the community for as long as possible and to promote the health and independence of Medicaid members who have a severe disabling mental illness and require long term care. The waiver is centered on recovery for members living within their community utilizing the supports offered by waiver. Members on the waiver strive to reach their fullest potential with help of service supports offered by the waiver, with an emphasis on social participation, attention to the rights of people with mental illness, and equality. The goal is to integrate members into the community in which they live, wherein they become a valued member of their community. The waiver assists with access to opportunities that exist that allow individuals to contribute at the level which they are capable.

I understand as an applicant to provide for the Life Coach service with the SDMI Medicaid Waiver program, I must meet the provider and service requirements as outlined in the HCBS SDMI Policy 340 located here: [SDMI HCBS 340 Life Coach](#). Please note: per policy, each Life Coach must be individually approved by the department, whether employed by an agency or as an independent provider.

Please check each box below to provide for your attestation that you can or will be able to meet the following provider and service requirements:

- ☐ I am at least 18 years of age.
- ☐ I am able to complete 8 hours of Mental Health Training annually.
- ☐ I understand I must submit a quarterly report to the Case Management Team (CMT) which includes the progress on the member's identified SMART goals and the methodologies/activities used by the Life Coach to assist the member in achieving the goals.

SDMI Life Coach Attestation/Training

Sign here



- ☐ I agree to sign an affidavit regarding confidentiality and HIPPA.
- ☐ I attest I am able to communicate effectively with the Member/Personal Representative.
- ☐ I agree to a state criminal background check.
- ☐ I will demonstrate to the member specific competencies necessary to complete paid tasks.
- ☐ I will complete a self-declaration regarding infections and contagious disease.
- ☐ I will demonstrate knowledge of how to report abuse, neglect, or exploitation.
- ☐ I attest that I have read and understand the SDMI HCBS 340 Life Coach policy.

Applicant Signature: [Click or tap here to enter text.](#)

Training requirement:

[Free Online Mental Health Courses Alison](#)

- Mental Health Support Worker Essentials
- Understanding Mental Health and Psychiatric Disorders
- Mental Health & Psychosocial Support

To obtain a certificate from Alison, you must achieve a score of **80% or more** in each assessment. We do not expect you to pay for the certificate, a screenshot of the certificate is acceptable.

Please submit all required documentation and training certificate within 30 days to:

SDMI Waiver

Department of Health and Human Services/Behavioral Health and Developmental Disabilities
2121 Rosebud Dr. Ste. H
Billings, MT 59106

Or

Fax: (406) 652.1895 Attn: SDMI Waiver

Email: Lori.Laubach-Duncan@mt.gov

Subject: Life Coach Enrollment

Your enrollment request will be processed once the attestation and supplemental information is received. If you have any questions regarding the required documentation for enrollment, please contact Lori Laubach-Duncan, Compliance Specialist, by calling (406) 655-7631 or sending an email to Lori.Laubach-Duncan@mt.gov.



Severe Disabling Mental Illness (SDMI) Life Coach Provider Enrollment Checklist

The SDMI Waiver Program has received your enrollment request. In addition to Conduent Enrollment and Licensing Requirements, SDMI has additional steps to address. The following information must be **read, signed, and dated as applicable**. **To avoid delays in the enrollment process, please use this checklist to ensure all required documents and supporting documentation are submitted:**

Phase 1: Policy & Compliance Resources

- **[] 1. SDMI Medicaid Waiver Policy Manual**
 - *Action:* Locate and review the manual on the [SDMI HCBS Waiver Manual site](#).
 - *Focus:* Pay specific attention to **Life Coach** [SDMI HCBS 340 Life Coach](#) policy section.
- **[] 2. Montana SDMI HCBS Waiver Website**
 - *Action:* Locate the Severe Disabling Mental Illness (SDMI) Home and Community Based (HCBS) Waiver Program website. [Severe Disabling Mental Illness SDMI Home and Community Based HCBS Waiver Program](#).
 - *Focus:* 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.
- **[] 3. Administrative Rules of Montana**
 - *Action:* Locate the Administrative Rules of Montana Website: [Home And Community-Based Services for Adults with Severe and Disabling Mental Illness: Respite Care | Montana SOS](#).
- **[] 4. Montana Medicaid Provider Site (SDMI Specific)**
 - *Action:* Locate the [SDMI Specific Provider Site](#).
 - *Focus:* Access fee schedules (SDMI), provider notices, and Medicaid Rules/Regulations (CFR, MCA, and ARM).

Please review the SDMI
Life Coach Provider
Enrollment Checklist for
additional resources and
information.

- [] **5. Mental Health Training**
 - *Action:* Complete **8 hours of Mental Health Training** and submit certificates.
- [] **6. Life Coach quarterly report**
 - *Action:* Review the SDMI Life Coach quarterly report. [SDMI LifeCoach-BIA quarterly report.pdf](#)
 - The provider must submit a quarterly report to the CMT which includes the progress on the member's identified goals and the methodologies/activities used by the Life Coach to assist the member in achieving the goals.

Phase 2: Administrative & Contact Information

- [] **7. AWARE SDMI Mobile Directory**
 - *Action:* Locate the [AWARE SDMI Mobile Directory Contact List](#) and save the contact list for AWARE case management staff phone numbers and email addresses.
- [] **8. Office of Public Assistance (OPA)**
 - *Action:* Locate the [DPHHS Assistance Application site](#).
 - *Note:* Keep the Helpline number (1-888-706-1535) accessible for SNAP, TANF, and Health Coverage inquiries.

Phase 3: Enrollment & Reporting Tools

- [] **9. Montana Healthcare Programs Enrollment Website**
 - *Action:* Visit the [Provider Enrollment site](#).
 - *Note:* This webpage is the primary provider enrollment site and includes online services, resources by provider type, provider enrollment, training and user guides.
 - *Recommended:* Register for The **Claim Jumper**. The Claim Jumper is published monthly and provides important announcements to providers.
- [] **10. Adult Protective Services (APS)**
 - *Action:* Locate the [Adult Protective Services](#) site.
 - *Note:* Save the reporting number (**1-844-277-9300**) for reporting abuse, neglect, or exploitation of vulnerable adults. If the concern is not life threatening, you can [contact APS online](#).



Questions?



Life Coach Documentation Requirements Policy SDMI #340

1. Service Must Address an Identified Social Determinant of Health as outlined in policy: [SDMI HCBS 340 Life Coach](#)

- Life Coach services must include at least one of the following social determinants of health:
 - o Economic stability;
 - o Education;
 - o Social and Community Context;
 - o Health and Healthcare; or
 - o Neighborhood and Built Environment.

Life Coach Documentation Requirements

Policy SDMI #340

Compliance is supported when:

The member's PCRP, Quarterly PCRP Review, Service Plan Addendum, or Life Coach documentation clearly identifies at least one applicable social determinant of health and shows that Life Coach services are being used to address that area.

Non-compliance may be indicated when:

Documentation does not identify an applicable social determinant of health, or the Life Coach services provided do not appear connected to an identified SDoH-related need.

Life Coach Documentation Requirements Policy SDMI #340

2. Goals Must Be Established by the Case Management Team

- o Life Coach services must be based on the member's goals. The case management team is responsible for setting goals for the member based upon the current SDoH assessment.
- o For purposes of review, the member's goals may be found in case management's PCRP, Quarterly PCRP Reviews, and/or Service Plan Addendums.
- o The reviewer should verify that Life Coach services are tied to a goal established by the case management team and that the goal is connected to at least one identified SDoH.

Life Coach Documentation Requirements Policy SDMI #340

Compliance is supported when:

The PCRPP, Quarterly PCRPP Review, or Service Plan Addendum contains a Life Coach goal, and the Life Coach documentation reflects service delivery toward that goal.

Non-compliance may be indicated when:

There is no Life Coach goal identified in the PCRPP or related planning document, the goal was not established by the case management team, the goal is not connected to a SDoH, or the service documentation does not align with the identified goal.

**Life Coach
Documentation
Requirements
Policy SDMI #340**

3. Life Coach Services Must Educate, Guide, Inspire, and Support the Member

- o Life Coach services are intended to educate, guide, inspire, and support the member in developing independent living skills and reaching the member's full potential based upon the member's goals.
- o The reviewer should determine whether the service documentation reflects active Life Coach service delivery and skill-building support related to the member's goals.

Life Coach Documentation Requirements

Policy SDMI #340

Compliance is supported when:

Progress notes or service documentation describe how the Life Coach educated, guided, inspired, or supported the member in developing independent living skills or working toward the member's identified goal.

Non-compliance may be indicated when:

Documentation only lists activities, transportation, observation, companionship, or general contact without showing how the Life Coach service supported skill development or progress toward the member's identified goal.

Life Coach Documentation Requirements Policy SDMI #340

4. Quarterly Life Coach Reports Must Be Submitted to the Case Management Team

- o Life Coach providers are required to submit quarterly Life Coach reports to the case management team. The SDMI Quarterly Report form is available online at: [SDMI Life Coach/BIA Quarterly Report](#).
- o For the review period, the reviewer should request the quarterly Life Coach reports from the case management entity and verify that the reports were submitted to the case management entity as required.
- o Because the Life Coach provider is required to submit the quarterly reports to the case management team, compliance should be verified through case management documentation or confirmation.



Life Coach Documentation Requirements Policy SDMI #340

- **Compliance is supported when:**
Quarterly Life Coach reports are present for the applicable review period and documentation supports that the reports were submitted to the case management team.
- **Non-compliance may be indicated when:**
Quarterly Life Coach reports are missing, incomplete, not submitted timely, or cannot be verified by the case management entity.

Life Coach Documentation Requirements Policy SDMI #340

5. Life Coach Service Coordination and Non-Duplication Requirements

- o Life Coach Services may not duplicate services provided under Behavioral Intervention Assistant.
- o Life Coach may be provided concurrently with Supported Employment but cannot be billed during the same time of the day a member is working with Supported Employment.

Life Coach Service Documentation Review Summary

1. The Life Coach service addresses at least one required social determinant of health;
2. The service is tied to a case management team-established goal;
3. Life Coach documentation reflects active education, guidance, inspiration, support, or independent living skill development;
4. Quarterly Life Coach reports were submitted to the case management team; and
5. The Life Coach service complies with applicable non-duplication and non-overlapping billing requirements.

SDMI Life Coach Quarterly Report Example

SDMI LIFE COACH/BIA QUARTERLY REPORT

PER POLICIES SDMI HCBS 305 & 340 THE PROVIDER MUST SUBMIT A QUARTERLY REPORT TO THE CMT WHICH INCLUDES THE PROGRESS ON MEMBER'S IDENTIFIED GOALS AND THE METHODOLOGIES/ACTIVITIES USED BY THE LIFE COACH/BIA TO ASSIST THE MEMBER IN ACHIEVING THE GOALS.

REPORT DATE	MEMBER NAME	PREPARED BY (LIFE COACH/BIA)
07/10/2026	TRAINING EXAMPLE - Sample Member	Jordan Lee, Life Coach

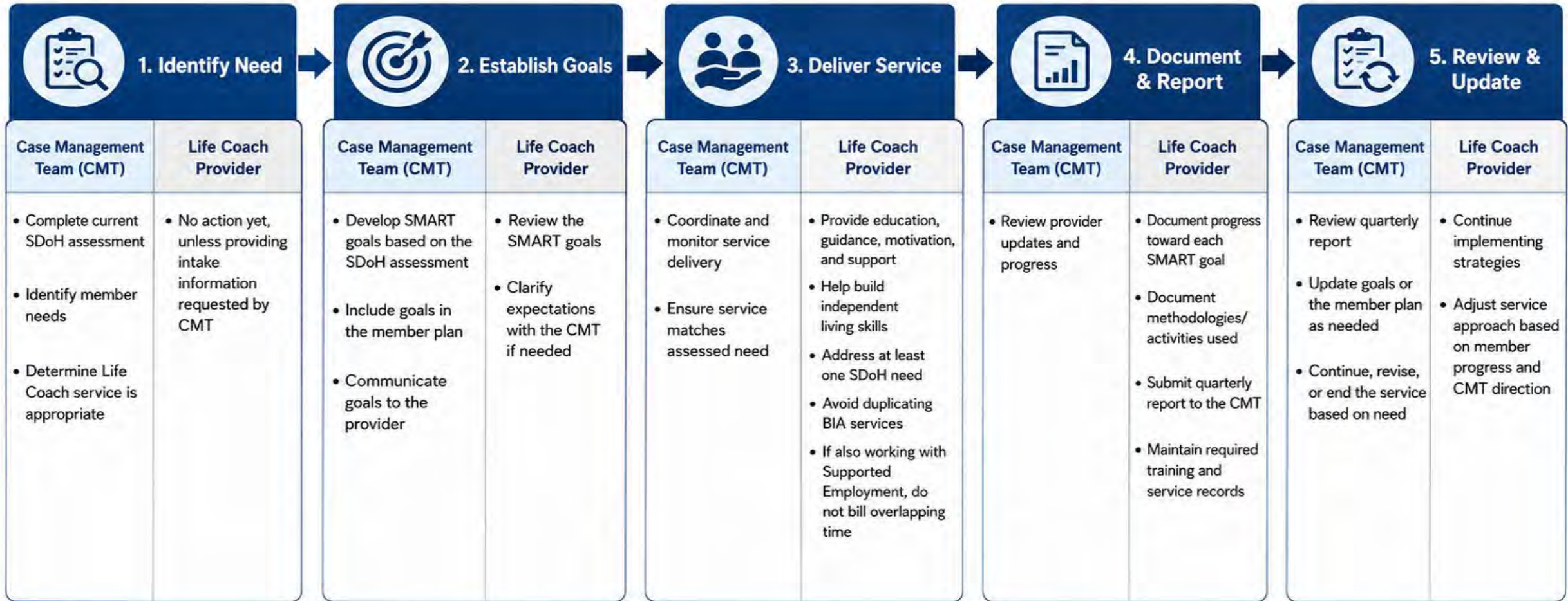
GOAL PROGRESS

SMART GOAL AS ESTABLISHED BY THE AWARE CMT	PROGRESS	METHODOLOGIES/ACTIVITIES
Economic Stability/Food Security: By 09/30/2026, the member will independently create a weekly grocery list and purchase ingredients for at least 3 low-cost, balanced meals per week while staying within a \$60 weekly food budget in 3 of 4 consecutive weeks.	Partially achieved. During this quarter, the member completed a grocery list in 8 of 12 weeks and stayed within the \$60 budget in 7 of those weeks. The member prepared 3 planned meals in 6 weeks and 2 planned meals in 4 weeks. The member now identifies unit prices with occasional verbal prompting but continues to need support planning meals before shopping.	Reviewed weekly grocery ads and available food resources; taught comparison of unit prices and lower-cost substitutions; used a simple meal-planning worksheet; modeled creating a grocery list from planned meals; practiced estimating total cost before checkout; used motivational interviewing and strengths-based feedback; gradually reduced prompts as the member demonstrated skill.

SDMI Life Coach Quarterly Report Example Con't.

SMART GOAL AS ESTABLISHED BY THE AWARE CMT	PROGRESS	METHODOLOGIES/ACTIVITIES
Health and Health Care/Health Literacy: By 09/30/2026, the member will use a calendar or phone reminder to track appointments and prepare at least 2 questions before 3 of 4 scheduled medical appointments, with no more than one reminder from the Life Coach.	Making progress. The member entered 4 of 5 appointments into the phone calendar and attended 4 appointments. The member prepared 2 questions before 3 appointments and independently used the reminder system for the two most recent appointments. One appointment was missed after the reminder was entered incorrectly. The member reports increased confidence asking providers for clarification.	Provided education on using the phone calendar and alerts; practiced entering sample appointments and checking reminder settings; developed a short appointment-preparation checklist; role-played asking questions and requesting plain-language explanations; reviewed after each appointment what worked and what should change; reinforced independent use rather than completing tasks for the member.
SMART GOAL AS ESTABLISHED BY THE AWARE CMT	PROGRESS	METHODOLOGIES/ACTIVITIES
Social and Community Context/Social Cohesion: By 09/30/2026, the member will identify 2 preferred community activities and attend at least 1 activity twice per month for 3 consecutive months, including independently contacting the organization for schedule information at least once.	Partially achieved. The member identified a library craft group and a community walking group. The member attended 5 activities during the quarter: 2 in April, 1 in May, and 2 in June. The member independently called the library once to confirm the schedule. Attendance was below goal in May due to reported anxiety and transportation difficulty. The member continues to benefit from advance planning and encouragement.	Used interest exploration to identify preferred activities; reviewed community calendars and eligibility/cost information with the member; broke participation into smaller steps; practiced making an information call through role-play; developed a written plan for date, time, transportation, and coping strategies; used encouragement and problem-solving after missed opportunities; did not provide therapy or duplicate transportation services.

Life Coach Service Process: Case Management vs. Provider Responsibilities



Key Compliance Points

- ✓ Service must address at least one Social Determinant of Health (SDoH)
- ✓ Goals must be established by the Case Management Team
- ✓ Provider must submit quarterly progress reports
- ✓ Life Coach must not duplicate Behavioral Intervention Assistant (BIA) services
- ✓ Life Coach and Supported Employment cannot be billed for the same or overlapping time



One Last Note:

- Participation as an SDMI Life Coach provider does not replace or supersede other requirements that apply to the provider.
 - Providers must comply with all applicable requirements, including:
 - SDMI waiver policy and provider requirements;
 - Applicable Administrative Rules of Montana (ARM);
 - Medicaid enrollment, billing, documentation, and record-retention requirements; and
 - Any additional licensing, certification, or regulatory requirements that apply to the provider's organization or provider type.
 - **Example:** A licensed mental health center that also provides Life Coach services must comply with both the requirements applicable to licensed mental health centers and the SDMI Life Coach service requirements.
 - Providers are responsible for understanding and complying with all requirements applicable to their organization and the services they deliver.
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Questions?

SDMI Provider Education

The SDMI Team

Isaac Coy, Treatment Bureau Chief

ICoy@mt.gov (406) 444-7922

Jean Perrotta, SDMI Section Supervisor

jperrotta@mt.gov (406) 497-6609

Jennifer Bergmann QA Program Manager

JBergmann@mt.gov (406) 444-3704

Cindy Shay Program Manager

Cynthia.Shay@mt.gov (406) 444-3743

Lori Laubach-Duncan Compliance Specialist

Lori.Laubach-Duncan@mt.gov (406) 655-7631

Jessica Effenberger, Community Program Officer

Jessica.Effenberger@mt.gov (406) 329-1520