MONTANA DPHHS
Healthy People. Healthy Communities.
Department of Public Health & Human Services

Surveillance and Utilization Review Section (SURS)

Xerox Provider Training

Spring 2015

Jennifer Tucker, CPC
SURS Supervisor

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What is SURS?

Surveillance/Utilization Review Section is a federally mandated program [42 CFR, Part 456.3]

The program maintains a strong commitment to assure that the right provider is receiving the right payment for the right services at the right time. We identify potential fraud, waste and abuse to ensure that State and Federal monies are spent appropriately.

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We accomplish this by:

- performing retrospective reviews
- educating medical providers
- recovering overpayments if indicated

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The Medicaid Processing System

- Claims processing system includes numerous edits
- To identify most billing errors
- It doesn’t detect all errors

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The Medicaid Processing System

- Some claims are paid in error
  - due to incorrect billing
  - system complications
- ALL paid claims are subject to retrospective review
  - this includes prior authorized claims

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Overpayment Recovery

SURS can recover whether the error is caused by the provider or the Medicaid claims processing system. [ARM 37.85.406 (9) & (10)]

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Referrals

Referrals may come from:

- Program Officers
- Other agencies
- Fraud detection system
- Anywhere!

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Montana Medicaid Website

http://medicaidprovider.mt.gov/

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http://medicaidprovider.mt.gov/

Home | DPHHS Home

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Page Safety Tools

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SERVICES AGENCIES LOGIN SEARCH

MONTANA DPHHS

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About Us | Meetings & Events | Health Data & Statistics | Contact Us | A - Z Index

Children Families Seniors Health Medical Assistance

Montana Healthcare Programs Provider Information » Home

Montana Healthcare Programs

Provider Enrollment
New or Existing Providers

MATH Web Portal
Log in to
Montana Access to Health

Member Information

Provider Information

Claim Instructions

Montana Healthcare Programs Provider Information

Welcome to the Montana Healthcare Programs Provider Information website. While there is a new look to the website, accessing the information remains the same. See the table below for a list of links you may find useful.

If you are unable to locate a resource you need, please contact Provider Relations at 1.800.624.3958 or 406.442.1837.

Quick Access

Quick Links

Information Source	Description
Announcements	See the Announcements for All Providers and the Drug and Pharmacy News panes below for announcements. New announcements will be added at the top of these panes.
What's New on the Website	A list of the documents posted to the website for the current month. The list is posted each Friday afternoon.
Contacts and Websites	See the Contact Us link in the menu on the left for address, telephone, fax, and website information.
Current RBRVS	The current RBRVS is accessible on this webpage in this pane. Updates will be posted here.

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FAQs

Forms

Health Improvement Program

ICD-10 Information

Local Offices of Public Assistance

Medicaid Fraud and Abuse

Nurse First

Passport to Health

Plan First

Preferred Drug List

Presumptive Eligibility

Prior Authorization Information

Provider Locator Search

Resources by Provider Type

Team Care

Terminated/Excluded Medicaid Providers

Training

Web Portal Tutorials

Web Portal Registration

Medicaid Statistics	Statistics on Medicaid providers, members, and claims from FY2001 to FY2014 in PDF format.
Newsletters	The monthly Montana Healthcare Programs newsletter, the *Claim Jumper*, is published online only. The newsletter can be accessed at *Claim Jumper* Newsletters (also in the left menu).
Provider Type	Most of the information on this website is organized by provider type. Each provider type has a page containing resources (fee schedules, provider manuals, provider notices, and other resources) applicable to that provider type. See the Resources by Provider Type link in the menu on the left.
Rebateable Manufacturers	Montana Medicaid reimburses only for drugs that are manufactured by companies that have a signed rebate agreement with CMS. To determine if a manufacturer has signed a rebate agreement, check the first 5 digits of the National Drug Code (NDC) against the list. If there is no match, the drug is not reimbursable.
Vaccines for Children	In addition to the link on the DPHHS website (Vaccines for Children), refer to provider notices on your provider type page and articles in *Claim Jumper* newsletters for information.

Announcements

Announcements for All Providers

Mass Adjustment

A mass adjustment for Method II crossover claims for Critical Access Hospitals has been processed. Please call Xerox Provider Relations at 1.800.624.3958 if you have questions.

Upcoming Spring 2015 Training

Planning for the Spring 2015 Provider Training is now underway! DPHHS programs and Xerox will present on-site sessions in Helena, Great Falls, and Kalispell during May. Watch the Training page for updates.

Electronic Funds Transfer (EFT) and Electronic Remittance Advice (ERA) Changes Final Update

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SERVICES AGENCIES LOGIN SEARCH

About Us | Meetings & Events | Health Data & Statistics | Contact Us | A - Z Index

Children Families Seniors Health Medical Assistance

Montana Healthcare Programs Provider Information » Select Your Provider Type

Montana Healthcare Programs

Provider Enrollment
New or Existing Providers

MATH Web Portal
Log in to
Montana Access to Health

Member Information

Provider Information

Claim Instructions

Claim Jumper Newsletters

Contact Us

Definitions and Acronyms

Select Your Provider Type

Providers are listed in alphabetical order.

A – C | D – F | G – K | L – O | P – Q | R – Z

Providers A – C

02.11.2015 Ambulance
02.11.2015 Ambulatory Surgical Center
02.11.2015 Audiologist
02.11.2015 Chemical Dependency
02.11.2015 Chiropractor
02.11.2015 Clinic (Freestanding Dialysis)
02.11.2015 Clinic (Public Health)

Here you can select the provider type you are looking for.

TOP

Providers D – F

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OFFICIAL STATE WEBSITE

SERVICES AGENCIES LOGIN SEARCH

Montana Healthcare Programs Provider Information » Physician

Physician

Multiple resources are available on this page

Montana Healthcare Programs

Provider Enrollment
New or Existing Providers

MATH Web Portal
Log in to
Montana Access to Health

Member Information

Provider Information

Claim Instructions

Claim Jumper Newsletters

Contact Us

Definitions and Acronyms

Enhanced Payment

Electronic Billing

EPSDT

Provider Manuals

General Information for Providers *11.2014*

Medicaid manual with general information for all provider types.

Physician-Related Services *07.2014*

This manual has information specific to your provider type.

Mental Health Services – Adult *01.2014*

This manual has information specific to your provider type.

Mental Health Services – Children *09.2014*

See the CMHB section of the Plans and Publications page on the DPHHS website.

Passport to Health Provider Guide *09.2013*

Everything a provider needs to know to become a successful Passport provider.

Prescription Drug Program *09.2013*

This manual has information specific to your provider type.

Provider Manuals – Replacement Pages

Medicaid Rules and Regulations

Fee Schedules – Physician

Fee Schedules – 72-Hour Presumptive

Fee Schedules – ATP Tests and Fees

Fee Schedules – Medicaid Mental Health

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Claim Instructions
Claim Jumper Newsletter
Contact Us
Definitions and Acronyms
Enhanced Payment
Electronic Billing
EPSDT
FAQs
Forms
Health Improvement Program
ICD-10 Information
Local Offices of Public Assistance
Medicaid Fraud and Abuse
Nurse First
Passport to Health
Plan First
Preferred Drug List
Presumptive Eligibility
Prior Authorization Information

This manual has information specific to your provider type.

Provider Manuals – Replacement Pages
Medicaid Rules and Regulations
Fee Schedules – Physician
Fee Schedules – 72-Hour Presumptive
Fee Schedules – ATP Tests and Fees
Fee Schedules – Medicaid Mental Health
Fee Schedules – Mental Health Services Plan (MHSP)
Provider Notices 2010–2015
Provider Notices 2000–2009
Other Resources

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Provider Information

Claim Instructions

Claim Jumper Newsletters

Contact Us

Definitions and Acronyms

Enhanced Payment

Electronic Billing

EPSDT

FAQs

Forms

Health Improvement Program

ICD-10 Information

Local Offices of Public Assistance

Medicaid Fraud and Abuse

Nurse First

Passport to Health

Fee Schedules – Medicaid Mental Health

Fee Schedules – Mental Health Services Plan (MHSP)

Provider Notices 2010–2015

For prescription medication notices, see the Pharmacy page.

2015

03.27.2015 Initial Prescription Fill Requirements for Attention Deficit Hyperactive Disorder Stimulant Drugs

03.25.2015 EFT for Passport Providers

03.11.2015 Criteria for Breast Reconstruction

03.11.2015 Criteria for Prophylactic Mastectomy

02.23.2015 New Restrictions Added to Hydrocodone-Chlorpheniramine Suspension (Tussionex®)

02.11.2015 New HCPCS Modifiers – XE, XP, XS, and XU

2014

12.18.2014 Electronic Funds Transfer (EFT) and Electronic Remittance Advice (ERA) Changes Final Notice

12.10.2014 Primary Care Enhanced Payment Extended

12.01.2014 Billing and Code Clarification for Individual and Family Therapy on the Same Day

11.24.2014 DME Order and Prescription Requirements

10.08.2014 Vaccine Administration Code Update

09.16.2014 Adoption of the New Children's Mental Health Bureau's Medicaid Provider Manual into Administrative Rules of Montana

08.22.2014 Tobacco Cessation Products

08.05.2014 Montana Prescription Drug Registry

06.25.2014 Elective Deliveries – Mid-Level Practitioners and Physicians

06.12.2014 ICD-10 Delay

06.06.2014 Changes to Prior Approval Requirement for Makena (Code J1725)

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Rule/Regulation Materials

- Code of Federal Regulations (CFR)
- Montana Code Annotated (MCA)
- Administrative Rules of Montana (ARM)

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File Edit View Favorites Tools Help

Page Safety Tools

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Home | Customers | Vendors | Libraries

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GPO's Federal Digital System
About FDsys
Search Government Publications
Browse Government Publications

- Browse
- Simple Search
- Advanced Search
  - * Boolean
  - * Proximity
- Search History
- Search Tips
- Corrections
- Latest Updates
- User Info
- FAQs
- Agency List
- Incorporation by Reference
- e-CFR Main Page

Related Resources

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Table of Contents, T...
Department of Public ...
File Edit View Favorites Tools Help
Page Safety Tools

Montana Code Annotated 2013

Table of Contents

TITLE 53. SOCIAL SERVICES AND INSTITUTIONS
CHAPTER 6. HEALTH CARE SERVICES

Part 1. Medical Assistance -- Medicaid

Back Up One Level in Table of Contents

53-6-101. Montana medicaid program -- authorization of services.
53-6-102. Repealed.
53-6-103. Repealed.
53-6-104. Freedom of doctors to treat recipients of medical assistance -- freedom to select doctor.
53-6-105. Discrimination prohibited.
53-6-106. Health care facility standards -- definitions.
53-6-107. Sanctions -- penalties.
53-6-108. Rules governing sanctions or remedies.
53-6-109. Consistent regulation of long-term care facilities -- rulemaking authority -- timeframes.
53-6-110. Report and recommendations on medicaid funding.
53-6-111. Department charged with administration and supervision of medical assistance program -- overpayment recovery -- sanctions for fraudulent and abusive activities -- adoption of rules.
53-6-112. Department to print and distribute copies of part and certain forms.
53-6-113. Department to adopt rules.
53-6-114. Rules of department binding.
53-6-115. Contracts with other agencies.
53-6-116. Medicaid managed care -- capitated health care.
53-6-117. Participation requirements.
53-6-118. through reserved

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SERVICES AGENCIES LOGIN SEARCH

Montana Healthcare Programs

Provider Enrollment
New or Existing Providers

MATH Web Portal
Log in to
Montana Access to Health

Member Information

Provider Information

Claim Instructions

Claim Jumper Newsletters

Contact Us

Definitions and Acronyms

Enhanced Payment

Electronic Billing

EPSDT

FAQs

- Provider Manuals
- Provider Manuals – Replacement Pages
- Medicaid Rules and Regulations
  - Code of Federal Regulations (Title 42)
  - Montana Code Annotated (Title 53, Chapter 6)
  - Administrative Rules of Montana (Title 37)
    - Chapter 79 Healthy Montana Kids
    - Chapter 82 Medicaid Eligibility
    - Chapter 83 Medicaid for Certain Medicare Beneficiaries and Others
    - Chapter 85 General Medicaid Services
    - Chapter 86 Medicaid Primary Care Services
- Fee Schedules – Physician
- Fee Schedules – 72-Hour Presumptive
- Fee Schedules – ATP Tests and Fees
- Fee Schedules – Medicaid Mental Health
- Fee Schedules – Mental Health Services Plan (MHSP)
- Provider Notices 2010–2015
- Provider Notices 2000–2009
- Other Resources

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Department of He... | Department of He... | Dept. 37--PUB...

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Page Safety Tools

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Department: PUBLIC HEALTH AND HUMAN SERVICES

37 : PUBLIC HEALTH AND HUMAN SERVICES

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Chapter No.	Chapter Title
37.1	ORGANIZATIONAL RULE
37.2	DEPARTMENT PROCEDURES
37.3	RESERVED
37.4	RESERVED
37.5	FAIR HEARINGS AND CONTESTED CASE PROCEEDINGS
37.6	RESERVED
37.7	RESERVED
37.8	RECORDS AND STATISTICS
37.9	RESERVED
37.10	EMERGENCY HEALTH SERVICES
37.11	RESERVED
37.12	LABORATORIES
37.13	RESERVED
37.14	RADIATION CONTROL
37.15	RESERVED
37.16	RESERVED

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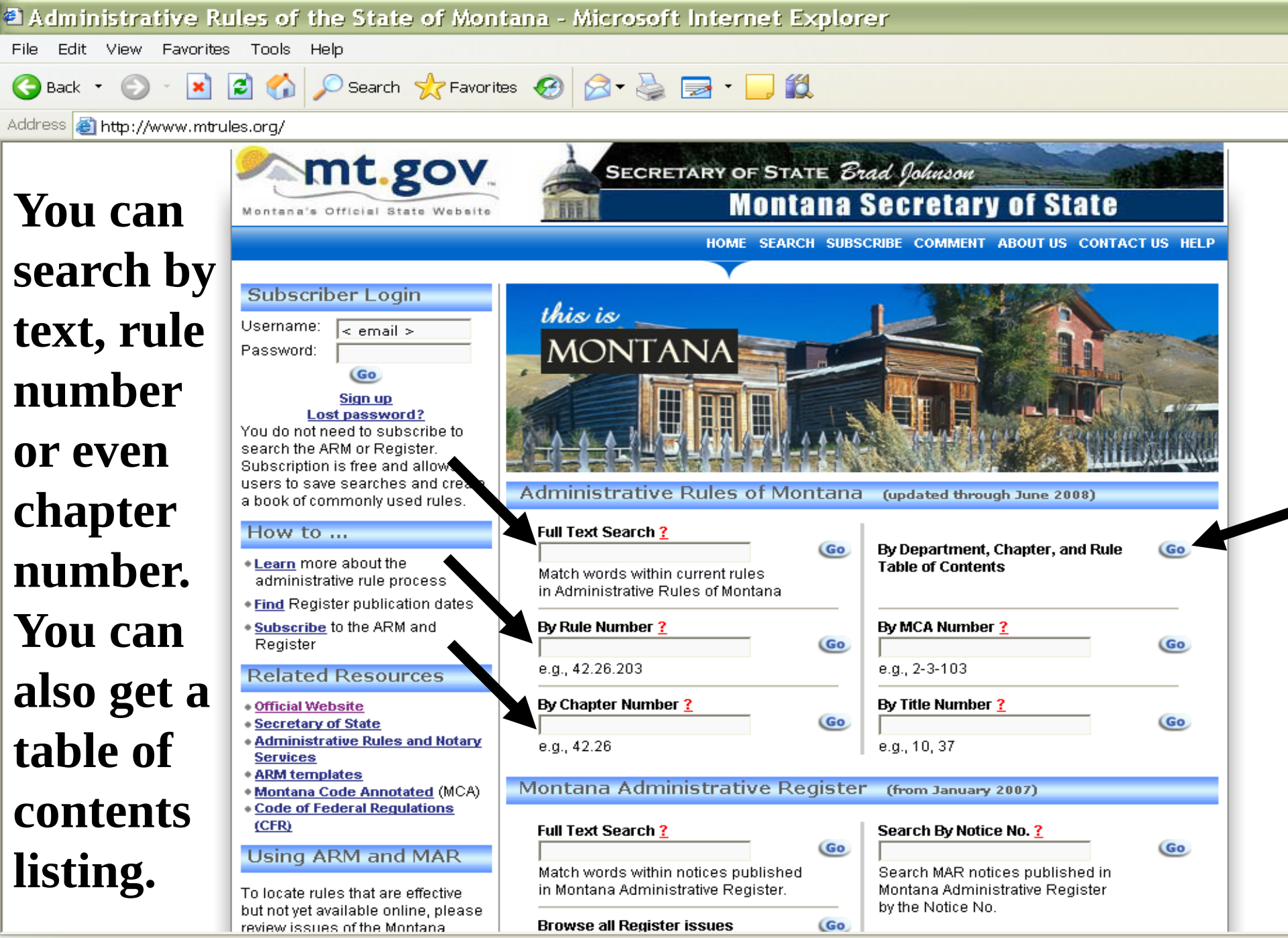

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Montana SECRETARY OF STATE

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Department List

Click on the Department name to search by Chapters.
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Press **Ctrl-F** to search by text.

Dept. No.	Department Name
1	GENERAL PROVISIONS
2	ADMINISTRATION
4	AGRICULTURE
6	STATE AUDITOR
8	COMMERCE
10	EDUCATION
12	FISH, WILDLIFE, AND PARKS
14	GOVERNOR
17	ENVIRONMENTAL QUALITY
18	TRANSPORTATION
20	CORRECTIONS
23	JUSTICE
24	LABOR AND INDUSTRY
30	LIEUTENANT GOVERNOR
32	LIVESTOCK
34	MILITARY AFFAIRS
36	NATURAL RESOURCES AND CONSERVATION
37	PUBLIC HEALTH AND HUMAN SERVICES

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Department: PUBLIC HEALTH AND HUMAN SERVICES

37 : PUBLIC HEALTH AND HUMAN SERVICES

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Click on the table header to re-sort the results.
Press **Ctrl-F** to search by text.

Chapter No.	Chapter Title
37.1	ORGANIZATIONAL RULE
37.2	DEPARTMENT PROCEDURES
37.3	RESERVED
37.4	RESERVED
37.5	FAIR HEARINGS AND CONTESTED CASE PROCEEDINGS
37.6	RESERVED
37.7	RESERVED
37.8	RECORDS AND STATISTICS
37.9	RESERVED
37.10	EMERGENCY HEALTH SERVICES
37.11	RESERVED
37.12	LABORATORIES
37.13	RESERVED
37.14	RADIATION CONTROL
37.15	RESERVED

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37.74	REFUGEE ASSISTANCE
37.75	CHILD AND ADULT CARE FOOD PROGRAM
37.76	FOOD AND NUTRITION SERVICES
37.77	RESERVED
37.78	TEMPORARY ASSISTANCE FOR NEEDY FAMILIES (TANF)
37.79	HEALTHY MONTANA KIDS (HMK)
37.80	CHILD CARE ASSISTANCE
37.81	PHARMACY ACCESS PRESCRIPTION DRUG BENEFIT PROGRAM
37.82	MEDICAID ELIGIBILITY
37.83	MEDICAID FOR CERTAIN MEDICARE BENEFICIARIES AND OTHERS
37.84	RESERVED
37.85	GENERAL MEDICAID SERVICES
37.86	MEDICAID PRIMARY CARE SERVICES
37.87	CHILDREN'S MENTAL HEALTH SERVICES
37.88	MEDICAID MENTAL HEALTH SERVICES
37.89	MENTAL HEALTH SERVICES
37.90	MENTAL HEALTH MEDICAID FUNDED 1115 AND 1915 WAIVERS
37.91	CERTIFICATION OF MENTAL HEALTH PROFESSIONAL PERSONS
37.92	RESERVED
37.93	LICENSURE OF CHILD PLACING AGENCIES
37.94	RESERVED
37.95	LICENSURE OF DAY CARE FACILITIES
37.96	RESERVED
37.97	LICENSURE OF YOUTH CARE FACILITIES
37.98	OUTDOOR BEHAVIORAL PROGRAM
37.99	RESERVED
37.100	LICENSURE OF COMMUNITY RESIDENCES
37.101	RESERVED
37.102	RESERVED

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Administrative Rules of the State of Montana

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Rule Chapter: 37.85

Chapter Title: GENERAL MEDICAID SERVICES

PUBLIC HEALTH AND HUMAN SERVICES

37.85 : GENERAL MEDICAID SERVICES

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Rule No.	Rule Title	Latest Version	Effective Date
	Subchapter 1 reserved		
	Subchapter 2 Miscellaneous		
37.85.201	SELECTION OF PROVIDER		7/1/1999
	Rules 37.85.202 and 37.85.203 reserved		
37.85.204	RECIPIENT REQUIREMENTS, COST SHARING		11/15/2002
37.85.205	RECIPIENT RESTRICTION OF ACCESS TO MEDICAL SERVICES	REP	7/23/2004
37.85.206	SERVICES PROVIDED		1/1/2010
37.85.207	SERVICES NOT PROVIDED BY THE MEDICAID PROGRAM		10/26/2007
	Rules 37.85.208 through 37.85.211 reserved		
37.85.212	RESOURCE BASED RELATIVE VALUE SCALE (RBRVS) REIMBURSEMENT FOR SPECIFIED PROVIDER TYPES		7/1/2009
	Rules 37.85.213 through 37.85.219 reserved		
37.85.220	INDEPENDENT DIAGNOSTIC TESTING FACILITIES		3/15/2002

Done

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Internet

http://www.mtrules.org/gateway/RuleNo.asp?RN=37%2E85%2E212

File Edit View Favorites Tools Help

37.85.212 : RESOURCE BASED RELATIVE VA...

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Montana's Official State Website

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HOME SEARCH COMMENT ABOUT US CONTACT US HELP

Rule: 37.85.212

Prev Up Next

Rule Title: RESOURCE BASED RELATIVE VALUE SCALE (RBRVS) REIMBURSEMENT FOR SPECIFIED PROVIDER TYPES

Department: PUBLIC HEALTH AND HUMAN SERVICES
Chapter: GENERAL MEDICAID SERVICES
Subchapter: Miscellaneous

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Latest version of the adopted rule presented in Administrative Rules of Montana (ARM):

Printer Friendly Version

37.85.212 RESOURCE BASED RELATIVE VALUE SCALE (RBRVS) REIMBURSEMENT FOR SPECIFIED PROVIDER TYPES

(1) For purposes of this rule, the following definitions apply:

(a) "Anesthesia units" means time and base units used to compute reimbursement under RBRVS for anesthesia services. Base units are those units as defined by the Medicare program. Time units are 15 minute intervals during which anesthesia is provided.

(b) "Conversion factor" means a dollar amount by which the relative value units, or the base and time units for anesthesia services, are multiplied in order to establish the RBRVS fee for a service. Effective July 1, 2008 there are four conversion factor categories. They are:

(i) physician services, which applies to the following health care professionals listed in (2): physicians, mid-levels, podiatrists, public health clinics, independent diagnostic testing facilities, nutrition providers, QMB and EPSDT chiropractors, and dentists rendering medical procedures. The conversion factor for physician services for state fiscal year 2010 is $40.09;

(ii) allied services, which applies to the following health care professionals listed in (2): physical therapists, occupational therapists, speech therapists, optometrists, opticians, audiologists, and school-based services. The conversion factor for allied services for state fiscal year 2010 is $30.39;

(iii) mental health services, which applies to the following health care professionals listed in (2): psychologists, licensed clinical social workers, and licensed professional counselors. The conversion factor for mental health services for state fiscal year 2010 is $24.26; and

(iv) anesthesia services, which applies to anesthesia services. The conversion factor for

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Coding Reference Materials

Some coding reference materials

- CPT and CPT Assistant
- HCPCS
- ICD-9-CM
- CDT
- DSM
- Publications or training specific to your specialty.

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"If it isn't documented, it didn't happen."

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Maintain records which demonstrate the extent, nature and medical necessity of services provided [ARM 37.85.414]

DOCUMENT!

DOCUMENT!

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Record Keeping Tips

- Retain medical records for six years and three months from the date of service

- Documentation must specify treatment start and end times when the service is time based. [37.85.414(1)(b)]

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Record Keeping Tips

- Records cannot be altered and must reflect the services provided. If a record needs to be corrected, a provider should…
    - Cross out with a single line
    - Write correct information
    - Date and initial the correction

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Record Keeping Tips

- Providers must have a contingency plan to ensure the availability of documentation in the event of a loss of medical records.

  [ARM 37.85.414]

- Providers must obtain **written** authorization from the Department for any variation from the usual billing practice.

  [ARM 37.85.412 and 37.85.413]

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Provider Responsibility

It is the ***<u>responsibility of the provider</u>*** to be knowledgeable about sections of the Administrative Rules that relate to their provider type, provider policies and covered services.

In addition, providers are encouraged to ensure their employees are not listed on the federal exclusion databases.

Special Advisory http://oig.hhs.gov/exclusions/advisories.asp

- **DOLI (**http://app.mt.gov/lookup/index.html)
- **LEIE (**http://exclusions.oig.hhs.gov/)
- **SAM** (https://www.sam.gov)

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Department of Labor and Industry (DOLI)

https://ebiz.mt.gov/pol/

File Edit View Favorites Tools Help

Page Safety Tools

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SERVICES AGE

Montana Department of LABOR & INDUSTRY

Search this site

Professional Licensing

Montana Department of Labor & Industry eServices

Record Keeping Tips

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Application for Licensure - please register for an account
Licensee Lookup - registration is not required, see link below

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Register for an Account | Reports (2) | Login

Search...

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Home | Professional & Occupational Licensing | Health Care Licensing

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Licensee Lookup
SEARCH FOR A LICENSEE

Professional & Occupational Licensing
RENEW / PRINT LICENSE

Health Care Licensing
RENEW / PRINT LICENSE

Login Here

User Name:

Password:

Login »

Remember me on this computer

I've forgotten my password.
New Users: Register for an Account

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For instructions to register for a new account, renew your license, or print your license click here.

Home | Professional & Occupational Licensing | Health Care Licensing

Search for Licensee

Enter information below to search for Licensees in the State's database. Licensee information can be searched by entering any of the following information:

- Name
- Business Name
- License Number
- City/State

Instructions Search Tips

ATTENTION:
As of August 1, 2013, the Plumber and Electrical Apprentice license look-up information is being managed by the Montana Registered Apprenticeship and Training Program.
To access apprentice license look-up information please go to:
https://jobs.mt.gov/jobs/apprenticeshipSearch.seek .

Search for Licensee — Search for Licensee

Licensing Board: --Select--
License Type: --Select--
State License Number: XXX-XXX-XXX-####
First Name:
Middle Initial:
Last Name:
Business Name:
City:
State: --Select--
Zip:

Search Clear

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List of Excluded Individuals/Entities (LEIE)

http://exclusions.oig.hhs.gov/

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U.S. Department of Health & Human Services

Office of Inspector General
U.S. Department of Health & Human Services

Report #, Topic, Keyword.. Search

Advanced

About OIG | Reports & Publications | Fraud | Compliance | Recovery Act Oversight | Exclusions | Newsroom

Home > Exclusions

Search the Exclusions Database

Search For An Individual

Search For Multiple Individuals | Search For A Single Entity | Search For Multiple Entities

Last Name (and/or) First Name

Search Clear

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125%

System for Award Management (SAM)

USER NAME PASSWORD

Create an Account

SAM
SYSTEM FOR AWARD MANAGEMENT

HOME | SEARCH RECORDS | DATA ACCESS | GENERAL INFO | HELP

CREATE USER ACCOUNT

Your CCR username will not work in SAM. You will need a new SAM User Account to register or update your entity records. You will also need to create a SAM User Account if you are a government official and need to create Exclusions or search for FOUO information.

Create User Account

REGISTER/UPDATE ENTITY

You can register your Entity (business, individual, or government agency) to do business with the Federal Government. If you are interested in registering or updating your Entity, you must first create a user account.

Register/Update Entity

SEARCH RECORDS

All entity records from CCR/FedReg and ORCA and exclusion records from EPLS, active or expired, were moved to SAM. You can search these records and new ones created in SAM. If you are a government user logged in with your SAM user account, you will automatically have access to FOUO information.

Search Records

Need Help?

WHAT IS SAM?

The **System for Award Management** (SAM) is **a Federal Government owned and operated** free web site that consolidates the capabilities in CCR/FedReg, ORCA, and EPLS. Future phases of SAM will add the capabilities of other systems used in Federal procurement and awards processes.

NEWS AND ANNOUNCEMENTS

SAM Management Moves to GSA FAS and CIO

Click on General Info and go to the News and Announcements section for the full story.

Can I use my CCR username in SAM?

Click HERE to find answers to this and other top questions

USER GUIDES/HELPFUL HINTS

Additional information, such as a full User Guide, Quick Start Guides, Helpful Hints, and Webinars are available on the HELP tab.

Service Desk

URL: http://www.FSD.gov

FORMER CCR REGISTRANTS

If you had an active record in CCR, you have an active record in SAM. You do not need to do anything in SAM at this time, unless a change in your business circumstances requires updates to your Entity record(s) in order for you to be paid or to receive an award or you need to renew your Entity(s) prior to its expiration. SAM will send notifications to the registered user via email 60, 30, and 15 days prior to expiration of the Entity. To update or renew your Entity records(s) in SAM you will need to create a SAM User Account and link it to your migrated Entity records. You do not need a user account to search for registered entities in SAM by typing

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SAM
SYSTEM FOR AWARD MANAGEMENT

USER NAME | PASSWORD | LOG IN

Forgot Username? | Forgot Password?

Create an Account

HOME | SEARCH RECORDS | DATA ACCESS | GENERAL INFO | HELP

Search Records

You can enter a DUNS number, CAGE code or Business Name to search for the entities that you are interested in reviewing.The top search bar allows you to enter any search term. You can also enter exclusion search terms to search for exclusion records. If you want to search for only a CAGE code or a DUNS number you can use the bottom two search bars. Once a search has returned results, use the filters provided to narrow results.

Government employees must create a SAM user account with their government email address. Log in before searching in order to see FOUO information and those registrants who selected to opt out of the public search.

You can only use one search bar at a time

Enter your specific search term

(Example of search term includes the entity's name, etc.)

DUNS Number Search: Enter DUNS number ONLY

CAGE Code Search: Enter CAGE code ONLY

SEARCH | Need Help?

SAM | System for Award Management 1.0

IBM v1.837.20130402-1804
WWW1

Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.

GSA | Integrated Acquisition Environment | USA.gov Government Made Easy

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Healthy People. Healthy Communities.
Department of Public Health & Human Services

Health Care Fraud Prevention and Enforcement Action Team (HEAT) Provider Compliance Training

http://oig.hhs.gov/newsroom/video/2011/heat_modules.asp

- Understanding Program Exclusions
- Importance of Documentation

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http://oig.hhs.gov/newsroom/video/2011/heat_modules.asp

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Home > Compliance > HEAT Provider Compliance Training

HEAT Provider Compliance Training Videos

Videos and Audio Podcasts

This page contains videos and audio podcasts that are part of the award-winning Health Care Fraud Prevention and Enforcement Action Team (HEAT) Provider Compliance Training initiative. We hope you'll take a look at these educational presentations designed to help prevent fraud, waste, and abuse.

These videos are available in audio-only format.

A Toolkit for Health Care Boards

Lewis Morris, Chief Counsel to the Inspector General, provides tips for health care boards to promote quality of care and embrace compliance with the law.

- Handout: A Toolkit for Heath Care Boards

I'm looking for

Let's start by choosing a topic

Select One

- What's New
- News Releases
- New Media
- Spotlight Articles
- Testimony & Speeches
- Video

EXCLUSIONS

Done

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http://oig.hhs.gov/newsroom/video/2011/heat_modules.asp

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Handout: A Toolkit for Heath Care Boards

Inspector General Introduces Compliance Training Videos and Audio Podcasts

How to Use the Exclusions Database

How to Report Fraud to the OIG

OIG's Self Disclosure Protocol

Importance of Documentation

Tips for Implementing an Effective Compliance Program

Compliance Program Basics

OIG Guidance

Physician Self-Referral Law

EXCLUSIONS DATABASE

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http://oig.hhs.gov/newsroom/video/2011/heat_modules.asp

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The videos are hosted on YouTube.com and embedded on OIG's web pages. If YouTube.com is blocked on your computer, any content embedded on our site will not be accessible. Please contact your IT department to remove the YouTube restriction and view these videos.

Webcast Modules

On this page you will find 16 modules from the HEAT Provider Compliance Training Webcast.

For more information and downloadble presentation material, visit the Webcast page.

- Welcome Remarks 4:37
- Overview of OIG 9:56
- Navigating the Fraud and Abuse Laws 26:26
- Compliance Program Basics 17:01
- Operating an Effective Compliance Program 15:59
- Understanding Program Exclusions 10:26
- Navigating the Government 5:10
- Overview of Centers for Medicare and Medicaid Services 34:24
- Importance of Documentation 17:06
- OIG Subpoenas Audits Surveys and Self Disclosure Protocol 17:42
- Health Care Fraud Enforcement Panel 6:08
- Health Care Fraud Enforcement Panel with CMS Deputy Admin 13:43
- Health Care Fraud Enforcement Panel with Special Agent 15:10
- Health Care Fraud Enforcement Panel with Asst. US Attorney 17:08
- Health Care Fraud Enforcement Panel - Fraud Control Unit 11:15
- Adjournment 0:59

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HIPAA

- American Recovery & Reinvestment Act has many changes for HIPAA [45 CFR, Part 160-164]
  - http://frwebgate.access.gpo.gov/cgi-bin/getdoc.cgi?dbname=111_cong_bills&docid=f:h1enr.pdf
- CMS Website for HIPAA info
  - http://www.cms.gov/HIPAAGenInfo/
- Office for Civil Rights Website
  - http://www.hhs.gov/ocr/privacy/index.html

James Oster
HIPAA Program Officer
DPHHS Quality Assurance Division

1-800-645-8408 **Hotline**

PO Box 202960
Helena, MT 59620-2960

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RAC

Recovery Audit Contract (RAC):

- Instituted by the Affordable Care Act (ACA) to help identify and recover overpayments and to identify underpayment. Montana contracted with Health Management Systems (HMS) as of December 15, 2012.
  - Audit request information will be sent from HMS on behalf of the State of Montana Medicaid.
  - Mike Murry, MMurry2@mt.gov or (406) 444-4168

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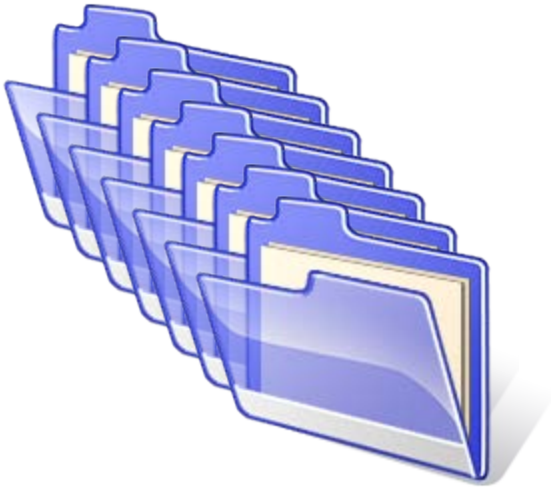
What are we doing?

Our unit is consistently working on several projects:

- Team Audits
- Self Audits
- Individual Audits
- New Provider Audits
- Data Audits



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The progression of an audit…

1. Audit idea
2. Collection of data
3. Initial contact with provider
4. Records request letter
5. Records review
6. Overpayment letter
7. Administrative Review
8. Additional records or information review
9. Administrative Review determination
10. Fair Hearing
11. Fair Hearing determination
12. Overpayment
13. Closure

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SURS Staff

Jennifer Tucker, CPC; SURS Supervisor

- 9 Program Integrity Auditors
  - Licensed Health Care Professionals
  - Certified Professional Coders
  - Certified Program Integrity Professionals
  - Licensed Practical Nurse

assigned to multiple provider types and specialties

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Contact Information

SURS Supervisor

» **Jennifer Tucker, CPC**

- DPHHS Quality Assurance Division
  SURS Unit
  2401 Colonial Drive
  PO Box 202953
  Helena, MT 59620

jtucker2@mt.gov

406-444-4586

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Questions?

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