



ADMINISTRATIVE RULES OF MONTANA



37.106.1935 MENTAL HEALTH CENTER: YOUTH AND ADOLESCENT AND ADULT TARGETED CASE MANAGEMENT

- (1) In addition to the requirements established in this subchapter, each mental health center providing youth and adolescent and adult targeted case management services shall comply with the requirements established in this rule.
- (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.
 - (e) maintain progress notes for each client. The progress notes must be entered into the client's clinical record at least every 30 days and upon the occurrence of any significant change in the client's condition;

- (f) ensure caseload sizes are sufficiently small to permit case managers to respond flexibly to differing service needs of youth and families, including frequency of contact;
- (g) develop written policies and procedures addressing the independence of the targeted case manager and targeted case management program. At a minimum, the policies and procedures must address:
 - (i) the targeted case manager acting as a client's advocate in involuntary commitment proceedings;
 - (ii) the targeted case manager's role in conflicts between the client and the mental health center or other agencies;
 - (iii) the ability of the targeted case manager to freely advocate for services from or outside of the mental health center on behalf of the client;
 - (iv) the relationship between the primary therapist, if the client has one, and the case manager;
 - (v) the obligation to report information to the mental health center staff that the client has requested to be kept confidential; and
 - (vi) the ability of the targeted case manager to contact an advocacy organization if the case manager believes the mental health center is unresponsive to the needs of the client.
- (3) The availability of targeted case management services may not be made contingent upon a client's willingness to receive other services. A client suspended or excluded from other programs or services provided by the mental health center may not be restricted or suspended from targeted case management services solely due to the action involving the other program or services.
- (4) Targeted case management services are largely provided throughout the community rather than in an office or a facility. All contacts with clients must occur in a place that is convenient for the client. More than 50% of a case manager's in person contacts with clients must be outside of the mental health center's facility. Restrictions may not be placed on a case manager's ability to meet with a client in any reasonable location.

Authorizing statute(s): 50-5-103, MCA

Implementing statute(s): 50-5-103, 50-5-204, MCA

History: NEW, 1998 MAR p. 539, Eff. 2/27/98; TRANS & AMD, 2002 MAR p. 916, Eff. 3/29/02; AMD, 2020 MAR p. 691, Eff. 11/1/20.