

CMS-1500 Claim Form Completion for PROMISe™ Mental Health & Substance Abuse Providers

Purpose of the document The purpose of this document is to provide a block-by-block reference guide to assist the following provider types in successfully completing the CMS-1500 claim form for Provider Type 11 (Mental Health/Substance Abuse), which includes:

- **Mental Health Rehabilitative Services (Family Based Mental Health Services)**
- **Mental Health Rehabilitative Services (Mental Health Crisis Intervention)**
- **Outpatient Psychiatric Partial Hospitalization Facility**
- **Licensed Social Worker**
- **Licensed Clinical Social Worker**
- **Peer Specialist**

Document format This document contains a table with four columns. Each column provides a specific piece of information as explained below:

- **Block Number** – Provides the block number as it appears on the claim.
 - **Block Name** – Provides the block name as it appears on the claim.
 - **Block Code** – Lists a code that denotes how the claim block should be treated. They are:
 - **M** – Indicates that the claim block must be completed.
 - **A** – Indicates that the claim block must be completed, if applicable.
 - **O** – Indicates that the claim block is optional.
 - **LB** – Indicates that the claim block should be left blank.
 - * – Indicates special instruction for block completion.
 - **Notes** – Provides important information specific to completing the claim block. In some instances, the Notes section will indicate provider specific block completion instructions.
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Ordering and Prescribing

The Patient Protection and Affordable Care Act (ACA) added requirements for provider screening and enrollment, including a requirement that states require physicians and other practitioners who order or refer items or services for MA beneficiaries to enroll as MA providers. The Department of Health and Human Services regulation implementing this requirement can be found at 42 CFR § 455.410.

Claims submitted by the following provider types and specialties must include the NPI of the MA enrolled ordering or prescribing provider:

NPI only included on the following specialties:

11-113 Partial Psych Hospitalization Children
11-114 Partial Psych Hospitalization Adult
11-442 Part Psych Hospital Child Therapeutic Staff Support
11-443 Part Psych Hospital Child Mobile Therapy
11-444 Part Psych Hospital Child Behavioral Specialist Consultant
11-446 Part Psych Hospital Adult Therapeutic Staff Support
11-447 Part Psych Hospital Adult Mobile Therapy
11-448 Part Psych Hospital Adult Behavioral Specialist Consultant
11-450 Family Based Mental Health Therapeutic Staff Support
11-451 Family Based Mental Health Mobile Therapy
11-452 Family Based Mental Health Behavioral Specialist Consultant
11-548 Therapeutic Staff Support
11-549 Mobile Therapy
11-558 Behavioral Specialist for Children with Autism
11-559 Behavioral Specialist Consultant

Providers should check block 17, 17a, and 17b for further direction.

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IMPORTANT INFORMATION FOR CMS-1500 CLAIM FORM COMPLETION

Note #1: If you are submitting handwritten claim forms you must use **blue** or **black** ink.

Note #2: **Font Sizes** — Because of limited field size, either of the following type faces and sizes are recommended for form completion:

- **Times New Roman, 10 point**
- **Arial, 10 Point**

Other fonts may be used, but ensure that all data will fit into the fields, or the claim may not process correctly.

Note #3 When completing the following blocks of the CMS-1500, **do not use decimal points and be sure to enter dollars and cents:**

1. Block 24F (\$Charges)
2. Block 29 (Amount Paid)

If you fail to enter both dollars and cents, your claim may process incorrectly. For example, if your usual charge is sixty-five dollars and you enter 65, your usual charge may be read as .65 cents.

Example #1: When completing Block 24F, enter your usual charge to the general public or approved rate, without a decimal point. You must include the dollars and cents. If your usual charge or approved rate is thirty-five dollars, enter:

24F	
\$CHARGES	
35	00

Example #2: When completing Block 29, you are reporting patient pay assigned by the County Assistance Office (CAO). Enter patient pay as follows, including dollars and cents:

29	
Amount Paid	
50	00

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You must follow these instructions to complete the CMS-1500 claim when billing the Department of Human Services. **Do not imprint, type, or write any information on the upper right hand portion of the form.** This area is used to stamp the Internal Control Number (ICN), which is vital to the processing of your claim. Do not submit a photocopy of your claim to Medical Assistance.

BlockNo.	Block Name	Block Code	Notes
1	Type of Claim	M	Place an X in the Medicaid box.
1a	Insured's ID Number	M	Enter the 10-digit beneficiary number found on the ACCESS card. If the beneficiary number is not available, access the Eligibility Verification System (EVS) by using the beneficiary's Social Security Number (SSN) and date of birth (DOB). The EVS response will then provide the 10-digit beneficiary number to use for this block.
2	Patient's Name	O	It is recommended that this field be completed to enable Medical Assistance (MA) to research questions regarding a claim.
3	Patient's Birthdate and Sex	O	Enter the patient's date of birth using an eight-digit MMDDCCYY (month, day, century, and year) format (e.g., 02151978) and indicate the patient's gender by placing an X in the appropriate box.
4	Insured's Name	A	If the patient has health insurance other than MA, list the name of the insured here. Enter the name of the insured except when the insured and the patient are the same - then the word SAME may be entered. If there is no other insurance other than MA, leave this block blank.
5	Patient's Address	O	Enter the patient's address.
6	Patient's Relationship to Insured	A	Check the appropriate box for the patient's relationship to the insured listed in Block 4.
7	Insured's Address	A	Enter the insured's address and telephone number except when the address is the same as the patient's, then enter the word SAME . Complete this block only when Block 4 is completed.
8	Reserved for	LB	Do not complete this block.

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BlockNo.	Block Name	Block Code	Notes
	NUCCC Use		
9	Other Insured's Name	A	If the patient has another health insurance secondary to the insurance named in Block 11, enter the last name, first name, and middle initial of the insured if it is different from the patient named in Block 2. If the patient and the insured are the same, enter the word SAME . If the patient has MA coverage only, leave the block blank.
9a	Other Insured's Policy or Group Number	A	This block identifies a secondary insurance other than MA, and the primary insurance listed in 11a–d. Enter the policy number <u>and</u> the group number of any secondary insurance that is available. Only use Blocks 9, 9a and 9d, if you have completed Blocks 11a, 11c and 11d, and a secondary policy is available. (For example, the patient may have both Blue Cross and Aetna benefits available.)
9b	Reserved for NUCC Use	LB	Do not complete block.
9c	Reserved for NUCC Use	LB	Do not complete block.
9d	Insurance Plan Name or Program Name	A	Enter the other insured's insurance plan name or program name.
10a–10c	Is Patient's Condition Related To:	A	Complete the block by placing an X in the appropriate YES or NO box to indicate whether the patient's condition is related to employment, auto accident, or other accident (e.g., liability suit) as it applies to one or more of the services described in Block 24d. For auto accidents, enter the state's 2-digit postal code for the state in which the accident occurred in the PLACE block (e.g., PA for Pennsylvania).
10d	Claim Codes (Designated by NUCC)	A	Enter the 9-digit social security number of the policyholder if the policyholder is not the beneficiary.
11	Insured's Policy Group or FECA	A/A	Enter the policy number and group number of the primary insurance other than MA.

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BlockNo.	Block Name	Block Code	Notes
	Number		
11a	Insured's Date of Birth and Sex	A/A	Enter the insured's date of birth in an eight-digit MMDDCCYY (month, day, century, and year) format (e.g., 03011978) and insured's gender if it is different than Block 3.
11b	Other Claim ID (Designated by NUCC)	LB	Do not complete block.
11c	Insurance Plan Name or Program Name	A	List the name and address of the primary insurance listed in Block 11.
11d	Is There Another Health Benefit Plan?	A	If the patient has another resource available to pay for the service, bill the other resource before billing MA. If the YES box is checked, Blocks 9, 9a and 9d must be completed with the information on the additional resource.
12	Patient's or Authorized Person's Signature and Date	M/M	The beneficiary's signature or the words Signature Exception must appear in this field. Also, enter the date of claim submission in an 8-digit MMDDCCYY format (e.g., 03012004) with no slashes, hyphens, or dashes). Note: Please refer to Section 6 of the PA PROMISe™ Provider Handbook for the 837 Professional/CMS-1500 Claim Form for additional information on obtaining patients signatures.
13	Insured's or Authorized Person's Signature	O	If completed, this block should contain the signature of the insured, if the insured is not the patient.
14	Date of Current Illness, Injury or Pregnancy (LMP)	O	If completed, enter the date of the current illness (first symptom), injury (accident date), or pregnancy in an eight-digit MMDDCCYY (month, day, century, and year) format (e.g., 03012004).
15	Other Date	O	If the patient has had the same or similar illness, list the date of the first onset of the illness in an eight-digit MMDDCCYY (month, day, century, and year) format

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BlockNo.	Block Name	Block Code	Notes
		LB	<p>11-549 Mobile Therapy: 11-558 Behavioral Specialist for Children with Autism: 11-559 Behavioral Specialist Consultant:</p> <p>Family Based Mental Health Services, Mental Health Crisis Intervention, and Peer Specialists:</p> <p>This block is not required to be completed by Family Based Mental Health Services, Mental Health Crisis Intervention, and Peer Specialists.</p>
17b	NPI #	A	Enter the 10-digit National Provider Identifier number of the attending and/or supervising physician or ordering or prescribing provider named in block 17.
18	Hospitalization Dates Related to Current Services	M/A	<p>Family Based Mental Health Services, and Peer Specialists</p> <p>Complete only if the patient was hospitalized in an inpatient setting. Enter the date in an eight-digit MMDDCCYY (month, day, century, and year) format (e.g., 03012004).</p> <p>Note#1: When billing for beneficiaries who receive Family Based Mental Health Services or peer support services during an inpatient admission, you must enter the admit and discharge date. Please reference OMHSAS Policy Clarifications ICM-04 and RC-01 for program specific guidelines.</p> <p>Note #2: Family Based Mental Health Service and Peer Specialist providers must wait until the beneficiary is discharged into the community prior to submitting the claim for services rendered in an inpatient setting or a long term care facility.</p>
19	Additional Claim Information (Designated by NUCC)	A	<p>This field must be completed with attachment type codes, when applicable. Attachment type codes begin with the letters “AT”, followed by a two-digit number (i.e., AT05).</p> <p>Enter up to four, 4-character alphanumeric attachment type codes. When entering more than one attachment</p>

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BlockNo.	Block Name	Block Code	Notes
			<p>type code, separate the codes with a comma (,).</p> <p>When using “AT05”, indicating a Medicare payment, please remember to properly complete and attach the "Supplemental Medicare Attachment for Providers" form MA 539.</p> <p>When using “AT10”, indicating a payment from a Commercial Insurance, please remember to properly complete and attach the "Supplemental Attachment for Commercial Insurance for Providers" form MA 538.</p> <p>Attachment Type Code “AT99” indicates that remarks are attached. Remarks must be placed on an 8-1/2" x 11" sheet of white paper clipped to your claim. Remember, when you have a remarks sheet attached, include your provider number and the beneficiary’s number on the top left-hand corner of the page (i.e., Enter AT26, AT99 if billing for newborns that have temporary eligibility under the mother’s beneficiary number. On the remarks sheet, include the mother’s full name, date of birth, and social security number.).</p> <p>If submitting an adjustment to a previously paid CMS-1500 claim (as referenced in Block 22), you must paper clip an 8-1/2" by 11" sheet of paper to the paper claim form containing an explanation as to why you are submitting the claim adjustment.</p> <p>For a complete listing and description of Attachment Type Codes, refer to the CMS-1500 Claim Form Desk Reference, located in Appendix A of the handbook.</p> <p><i>For additional information on completing CMS-1500 claim form adjustments, please refer to Section 2.10 – Claim Adjustments of the 837 Professional/CMS-1500 Claim Form Handbook.</i></p>
		A	<p>Qualified Small Businesses</p> <p>Qualified small businesses must <u>always</u> enter the following message in Block 19 (Additional Claim Information (Designated by NUCC)) of the CMS-1500, in addition to any applicable attachment type codes:</p> <p>“(Name of Vendor) is a qualified small business concern as defined in 4 Pa Code §2.32.”</p>

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BlockNo.	Block Name	Block Code	Notes
			<p>Health Crisis Intervention, and Peer Specialists: Do not complete this block.</p>
24a	Date(s) of Service	M/M	<p>Enter the applicable date(s) of service.</p> <p>If billing for a service that was provided on one day only, complete either the From or the To column (but not both.).</p> <p>If the same service was provided on consecutive days, enter the first day of the service in the From column and the last day of service in the To column. Use an eight-digit (MMDDCCYY) format to record the From and To dates, (e.g. 03012004). If the dates are not consecutive, separate claim lines must be used.</p> <p>Note: Peer Specialists must bill each date of service on a separate claim line.</p>
24b	Place of Service	M	<p>Enter the two-digit place of service code that indicates where the service was performed.</p> <p>Outpatient Psychiatric Partial Hospitalization Facility: 52 – Psychiatric Facility Partial Hospitalization</p>
		M	<p>Family Based Mental Health Services: 12 – Home 21 – Inpatient Hospital 32 – Nursing Facility 99 – Other (Community)</p>
		M	<p>Mental Health Crisis Intervention: 11 – Office 12 – Home 99 – Other (Community)</p>

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BlockNo.	Block Name	Block Code	Notes
		M	<p>Peer Specialists:</p> <p>11 – Office 12 – Home 21 – Inpatient Hospital 52 – Psychiatric Facility Partial Hospitalization 99 – Other (Community)</p>
24c	EMG	A	<p>Outpatient Psychiatric Partial Hospitalization:</p> <p>Enter 1 if the service provided was in response to an emergency, 2 if urgent. Otherwise, leave this item blank.</p>
		LB	<p>Mental Health Rehabilitative Services (Family Based Mental Health Services, Mental Health Crisis Intervention, and Peer Specialists):</p> <p>Do not complete this block.</p>
24d	Procedures, Services, or Supplies (CPT/HCPCS & Modifier)	M/AAAA	<p>List the procedure code(s) for the service(s) being rendered and any applicable modifier(s).</p> <p>In the first section of the block, enter the procedure code that describes the service provided.</p> <p>In the second portion of this block, enter the pricing modifier first if required to pay the claim. Use the third portion of this block to indicate up to three additional informational modifiers, when applicable. If no pricing modifier is required, enter up to four additional / informational modifier(s) using the second and third portions of this block. Failure to use the appropriate modifier(s) will result in inappropriate claims payment or denial.</p>

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BlockNo.	Block Name	Block Code	Notes
24e	Diagnosis Pointer	M	<p>This block may contain up to four letters.</p> <p>Enter the corresponding letter(s) (A – L) that identify the diagnosis code(s) in Block 21.</p> <p>If the service provided was for the primary diagnosis (in Block 21A), enter A. If provided for the secondary diagnosis, enter B. If provided for the third through twelfth diagnosis, enter the letter that corresponds to the applicable diagnosis.</p> <p>Note: The primary diagnosis pointer must be entered first.</p>
24f	\$Charges	M M	<p>Outpatient Psychiatric Partial Hospitalization and Peer Specialists:</p> <p>Enter your usual charge to the general public for the service(s) provided. For example, if your usual charge is thirty-five dollars, enter 3500.</p> <p>If billing for multiple units of service, multiply your usual charge by the number of units billed and enter that amount.</p> <p>Family Based Mental Health Services & Mental Health Crisis Intervention:</p> <p>Enter your approved rate for the service(s) provided. For example, if your approved rate is thirty-five dollars, enter 3500.</p> <p>If billing for multiple units of service, multiply your approved rate by the number of units billed and enter that amount.</p> <p>Note: Although usual charge is reflective of the whole rate, only the federal portion is received through Medical Assistance. The state portion of the rate is required to be billed and paid by the County prior to billing Medical Assistance.</p>
24g	Days or Units	M	Enter the number of units, services, or items provided.

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BlockNo.	Block Name	Block Code	Notes
24h	EPSDT/Family Planning	LB	Do not complete this block.
24i	ID Qualifier	A	Enter the two-digit ID Qualifier: G2 = 13-digit Provider ID Number (legacy #)
24j (a)	Rendering Provider ID #	A	Complete with the Rendering Provider's Provider ID number (nine-digit provider number and the applicable four-digit service location – 13-digits total). Note: Only one rendering provider per claim form.
24j (b)	NPI	A	Enter the 10-digit NPI number of the rendering provider.
25	Federal Tax I.D. Number	M	Enter the provider's Federal Tax Employer Identification Number (EIN) or SSN and place an X in the appropriate block.
26	Patient's Account Number	O	Use of this block is strongly recommended. It can contain up to 10 alpha, numeric, or alpha-numeric characters and can be used to enter the patient's account number or name. Information in this block will appear in the first column of the Detail Page in the RA Statement and will help identify claims if an incorrect beneficiary number is listed.
27	Accept Assignment?	LB	Do not complete this block.
28	Total Charge	LB	Do not complete this block.
29	Amount Paid	A	If a patient is to pay a portion of their medical bills as determined by the local County Assistance Office (CAO), enter the amount to be paid by the patient. Patient pay is only applicable if notification is received from the local CAO on a PA 162RM form. Do not enter copay in this block.
30	Reserved for NUCC Use	LB	Do not complete this block.

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BlockNo.	Block Name	Block Code	Notes
31	Signature of Physician or Supplier Including Degree or Credentials	M/M	This block must contain the signature of the provider rendering the service. A signature stamp is acceptable, if the provider authorizes its use and assumes responsibility for the information on the claim. If submitting by computer-generated claims, this block can be left blank; however, a Signature Transmittal Form (MA 307) must be sent with the claim(s). Enter the date the claim was submitted in this block in an 8-digit (MMDDCCYY) format (e.g. 03012004).
32	Service Facility Location Information	LB	Do not complete this block.
32a		LB	Do not complete this block.
32b		LB	Do not complete this block.
33	Billing Provider Info & Ph.#	A/A&M/M	Enter the billing provider's name, address, and telephone number Do not use slashes, hyphens, or spaces. Note: If services are rendered in the patient's home or facility, enter the service location of the provider's main office.
33a	NPI#	M	Enter the 10-digit NPI number of the billing provider.
33b		M/A	Enter the 13-digit Group/Billing Provider ID number (Legacy #)