CMS Billing Location Intake Add-On (PDF)

(January 2025 OPPS Update)

Purpose: This intake add-on ensures billing location, program type, and OPPS applicability are captured correctly under CMS January 2025 OPPS wage index and Pricer logic updates. **Use this form in addition to your standard intake.** This is **not** a replacement intake form.

SECTION 1 — PATIENT & INTAKE INFORMATION

Patient Name: _____

DOB: _____

Medical Record # (if applicable): _____

Intake Date: _____

Completed By (Staff Name): _____

SECTION 2 — BILLING FACILITY & LOCATION (REQUIRED)

Billing Facility Name: _____

Facility Type (check one):

☐ Hospital Outpatient Department (OPPS)
☐ Community Mental Health Center (CMHC)
☐ Partial Hospitalization Program (PHP)
☐ Intensive Outpatient Program (IOP)
☐ Outpatient Clinic (Non-OPPS)

Hospital-Based Facility?

☐ Yes   ☐ No   ☐ Unsure (billing to confirm)

SECTION 3 — SERVICE LOCATION (WAGE INDEX TRIGGER)

State: _____

County: _____

CMS uses county-level location data to apply wage index and OPPS payment logic.

SECTION 4 — PROGRAM / LEVEL OF CARE

Program Level (check one):
☐ PHP
☐ IOP
☐ Standard Outpatient
☐ Preventive Service
☐ Other: _____

Expected Start Date of Program/Services: _____

SECTION 5 — BILLING REVIEW FLAG

☐ Location verified for OPPS billing
☐ Program level confirmed
☐ Routed to billing team for setup (if required)

Billing / Intake Notes:

SECTION 6 — STAFF ATTESTATION

I confirm the information above reflects the **billing location and program type** for services to be rendered and is required for correct CMS OPPS reimbursement.

Staff Signature: _____
 Date: _____

✅ HOW THIS SHOULD BE USED IN PRACTICE

- Attach to **new patient intake packets**
- Use for **PHP / IOP enrollment**
- Use when **billing facility or program level changes**
- Store with administrative documents (not clinical notes)