

## Table 5: Mental Health and Substance Use Disorder Selected Service Detail Addendum Guidance

### PURPOSE

The purpose of the addendum of Table 5 – *Selected Service Detail* – is to fully capture integrated primary care and behavioral health treatment services provided in health centers. Reporting on an expanded group of health care providers who address mental health and substance use disorders better reflects the comprehensive, integrated model of care provided in health centers.

#### Specifically, the addendum captures information on:

- Mental health (MH) services provided by medical providers during medical visits.
- Substance use disorder (SUD) services provided by medical providers during medical visits.
- SUD services provided by MH providers during MH visits.

The patients and visits reported in the Selected Service Detail addendum involve a subset of activity already reported in the medical and/or mental health lines of the main part of Table 5.

- MH services provided in medical visits by medical providers (reported in the addendum, Lines 20a01 through 20a04) are a **subset of medical visits and patients** (main part of Table 5, Lines 1 through 10a and Line 15). They are **not** a subset of MH visits and patients (main part of Table 5, Lines 20a through 20).
- SUD services provided in medical visits by medical providers (reported in the addendum, Lines 21a through 21d) are a **subset of medical visits and patients** (main part of Table 5, Lines 1 through 10a and Line 15). They are **not** a subset of SUD visits and patients (main part of Table 5, Line 21).
- SUD services provided in mental health visits by mental health providers (reported in the addendum, Lines 21e through 21h) are a **subset of mental health visits and patients** (main part of Table 5, Lines 20a through 20b and Line 20). They are **not** a subset of SUD visits and patients (main part of Table 5, Line 21).

Some medical visits (in-person clinic or virtual) may involve both MH and SUD treatment and will be reported in both addendum sections in those instances.

Data in the addendum are reported only on the Universal table, not the Grant UDS Report tables.

### ADDENDUM INSTRUCTIONS

The Addendum to Table 5 – *Selected Service Detail* – is divided into two service categories: mental health and substance use disorder. For each service category, report the number of:

- **Providers** (counts, not full-time equivalents [FTE]) by type who provided MH and/or SUD treatment in Column a1. Medical providers can be counted once in each service category if they provide both types of services.
  - **For MH Detail**, count MH treatment provided by:
    - **Medical providers**, specifically Physicians (other than Psychiatrists), Nurse Practitioners, Physician Assistants, and Certified Nurse Midwives.

- **For SUD Detail**, count SUD treatment provided by:
  - **Medical providers**, specifically Physicians (other than Psychiatrists), Nurse Practitioners, Physician Assistants, and Clinical Nurse Midwives.
  - **Mental health providers**, specifically Psychiatrists, Licensed Clinical Psychologists, Licensed Clinical Social Workers, and Other Licensed Mental Health Providers (such as Psychiatric Nurse Practitioners, Psychiatric Social Workers, Family Therapists, and other licensed master's degree-prepared mental health providers).
- Contract providers paid by the visit are not reported in the FTE columns in the main portion of Table 5, but they are reported in the Selected Service Detail addendum since the count of providers is reported here rather than the FTE. It is possible to report, for example, zero providers on a line in the main section of Table 5, but one or more in the corresponding line of the Selected Service Detail.
- **Visits** that patients had for these services by provider type. Report in-person clinic visits in Column b and virtual visits in Column b2.
  - Use ICD-10 diagnostic codes associated with the visit to document/count the delivery of MH services by medical providers, and SUD services by medical and mental health providers.
  - **For MH Detail:**
    - Report visits that include treatment for MH on the addendum Lines 20a01 through 20a04.
    - Include *at minimum* all medical visits in which medical providers provided the coded ICD-10 codes specified on Table 6A, Lines 20a through 20d for MH treatment.
  - **For SUD Detail:**
    - Report visits that include treatment for SUD services on the addendum Lines 21a through 21h.
    - Include *at minimum*:
      - On Lines 21a through 21d, all medical visits in which medical providers provided the coded ICD-10 codes specified on Table 6A, Lines 18 through 19a for SUD treatment.
      - On Lines 21e through 21h, all MH visits in which MH providers provided the coded ICD-10 codes specified on Table 6A, Lines 18 through 19a for SUD treatment.
  - Exclude encounters that do not constitute a UDS countable visit or which do not have a counseling, evaluation, or treatment component associated, such as those that *only* provide the following MH or SUD services:
    - Screening
    - Medication delivery or refill
    - Patient education
    - Referral
    - Case management
  - MH and SUD treatment services should be reported even if there is no associated billing or reimbursement for the provision of these services.

- **Patients** seen for these services by provider type in Column c.
  - **For MH Detail:** Report patients who had countable visits that included treatment for MH on the addendum Lines 20a01 through 20a04.
  - **For SUD Detail:** Report patients who had countable visits that included treatment for SUD on the addendum Lines 21a through 21h.
  - Report the number of patients seen for a clinic (in-person) or virtual MH or SUD visit by provider type in the given line. The same patient may appear on more than one line in the addendum if seen by multiple provider types and/or had both MH and SUD treatment services.

## EXAMPLE SCENARIOS

### Integrated Visits

When a medical provider delivers MH treatment (in whole or in part) as part of a medical visit, count the visit on the appropriate line by provider type in the main part of Table 5 (on Lines 1-10a) and on the appropriate line in the Selected Service Detail addendum (20a01-20a04).

When a medical or MH provider provides SUD treatment, count the visit on the appropriate line by provider type in the main part of Table 5 (on Lines 1-10a or 20a-20b) and the appropriate line in the Selected Service Detail addendum (21a-21h).

Example Scenario	How to Report on Table 5
<p><b>A family physician who sees a patient for an annual check-up, and during that visit the provider also treats the patient for depression and opioid use disorder (OUD).</b></p>	<p>The visit is reported in three different places on Table 5:</p> <ul style="list-style-type: none"> <li>✓ Report the visit provided by the family physician and the physician’s FTE in the main part of Table 5 on Line 1, and include the patient in the medical total on Line 15.</li> <li>✓ Report the depression treatment provided by the physician (personnel, visit, and patient) in the MH Selected Service Detail addendum, Line 20a01.</li> <li>✓ Report the treatment provided for OUD (personnel, visit, and patient) in the SUD Selected Service Detail addendum, Line 21a.</li> </ul>
<p><b>A licensed clinical psychologist sees a patient for depression complicated by an alcohol-related disorder.</b></p>	<p>The visit is reported in two different places on Table 5:</p> <ul style="list-style-type: none"> <li>✓ Report the treatment services visit and the clinical psychologist FTE in the main part of Table 5 on Line 20a1, and the patient in the MH total on Line 20.</li> <li>✓ Report the alcohol-related treatment provided by the clinical psychologist (personnel, visit, and patient) in the SUD Selected Service Detail addendum, Line 21f.</li> </ul>

## Visits Related to Medication

Count services as visits only when they meet all the UDS visit criteria (refer to the [UDS Manual](#)). Never count medication administration, dispensing, prescription refills, or referrals as a visit.

Example Scenario	How to Report on Table 5
<b>A nurse practitioner (NP) evaluates and discusses an anti-depressant regimen by phone with the patient.</b>	<p>This phone visit is a virtual visit and is reported in two different places on Table 5:</p> <ul style="list-style-type: none"> <li>✓ Report the evaluation visit and the NP FTE in the main part of Table 5 on Line 9a (Column b2), and the patient in the medical total on Line 15.</li> <li>✓ Report the MH treatment services provided by the NP (personnel, virtual visit, and patient) in the MH Selected Service Detail addendum, Line 20a02.</li> </ul>
<b>An internist discusses a refill of antidepressant medication with a patient.</b>	DO NOT count the encounter as a visit on the main part of Table 5 or the addendum. It does not meet the criteria for a countable visit in the UDS Report.

## REFERENCES TO UDS TABLE 5 AND 6A

This section includes visual references/excerpts to the UDS Table 5 and Table 6A sections that are applicable to this reporting.

**Main part of Table 5, Medical** – Describes the activity reported in the Total Medical Care Services section, Table 5, Lines 1–10a and Line 15.

Line	Personnel by Major Service Category	FTEs (a)	Clinic Visits (b)	Virtual Visits (b2)	Patients (c)
1	Family Physicians				
2	General Practitioners				
3	Internists				
4	Obstetrician/Gynecologists				
5	Pediatricians				
7	Other Specialty Physicians				
8	<b>Total Physicians (Lines 1–7)</b>				
9a	Nurse Practitioners				
9b	Physician Assistants				
10	Certified Nurse Midwives				
10a	<b>Total NPs, PAs, and CNMs (Lines 9a–10)</b>				
15	<b>Total Medical Care Services (Lines 8 + 10a–14)</b>				

**Main part of Table 5, Mental Health** – Describes the activity reported in the Total Mental Health Services section, Table 5, Lines 20a–20b and Line 20.

Line	Personnel by Major Service Category	FTEs (a)	Clinic Visits (b)	Virtual Visits (b2)	Patients (c)
20a	Psychiatrists				
20a1	Licensed Clinical Psychologists				
20a2	Licensed Clinical Social Workers				
20b	Other Licensed Mental Health Providers				
20	<b>Total Mental Health Services (Lines 20a–c)</b>				

**Main part of Table 5, Substance Use Disorder** – Describes the activity reported in the Substance Use Disorder Services section, Table 5, Line 21.

Line	Personnel by Major Service Category	FTEs (a)	Clinic Visits (b)	Virtual Visits (b2)	Patients (c)
21	<b>Substance Use Disorder Services</b>				

**Addendum, Mental Health** – Describes the activity reported in the Mental Health Service Detail section, Table 5 Selected Service Detail Addendum, Lines 20a01-20a04.

Line	Personnel by Major Service Category: Mental Health Service Detail	Personnel (a1)	Clinic Visits (b)	Virtual Visits (b2)	Patients (c)
20a01	Physicians (other than Psychiatrists)				
20a02	Nurse Practitioners				
20a03	Physician Assistants				
20a04	Certified Nurse Midwives				

**Addendum, Substance Use Disorder** – Describes the activity reported in the Substance Use Disorder Detail section, Table 5 Selected Service Detail Addendum, Lines 21a-21h.

Line	Personnel by Major Service Category: Substance Use Disorder Detail	Personnel (a1)	Clinic Visits (b)	Virtual Visits (b2)	Patients (c)
21a	Physicians (other than Psychiatrists)				
21b	Nurse Practitioners (Medical)				
21c	Physician Assistants				
21b	Certified Nurse Midwives				
21e	Psychiatrists				
21f	Licensed Clinical Psychologists				
21g	Licensed Clinical Social Workers				
21h	Other Licensed Mental Health Providers				

**Table 6A, Selected Mental Health Diagnosis** – Describes the activity reported in the Selected Mental Health Conditions, Substance Use Disorders, and Exploitations section, Table 6A Selected Diagnoses and Services Rendered, Lines 20a-20d.

Line	Diagnostic Category	Applicable ICD-10 Code	Number of Visits by Diagnosis Regardless of Primacy (a)	Number of Patients with Diagnosis (b)
<b>Selected Mental Health Conditions, Substance Use Disorders, and Exploitations</b>				
20a	Depression and other mood disorders	F30- through F39-		
20b	Anxiety disorders, including post-traumatic stress disorder (PTSD)	F06.4, F40- through F42-, F43.0, F43.1-, F43.8-, F93.0		
20c	Attention deficit and disruptive behavior disorders	F90- through F91-		
20d	Other mental disorders, excluding drug or alcohol dependence	F01- through F09- (exclude F06.4), F20- through F29-, F43- through F48- (exclude F43.0- and F43.1-), F50- through F99- (exclude F55-, F64-, F84.2, F90-, F91-, F93.0,		

		F98-), O99.34-, R45.1, R45.2, R45.5, R45.6, R45.7, R45.81, R45.82, R48.0	
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**Table 6A, Selected Substance Use Diagnosis** – Describes the activity reported in the Selected Mental Health Conditions, Substance Use Disorders, and Exploitations section, Table 6A Selected Diagnoses and Services Rendered, Lines 18-19a.

Line	Diagnostic Category	Applicable ICD-10 Code	Number of Visits by Diagnosis Regardless of Primacy (a)	Number of Patients with Diagnosis (b)
<b>Selected Mental Health Conditions, Substance Use Disorders, and Exploitations</b>				
18	Alcohol-related disorders	F10-, G62.1, K70-, O99.31-		
19	Other substance-related disorders (excluding tobacco use disorders)	F11- through F19- (exclude F17-), G62.0, O99.32-		
19a	Tobacco use disorder	F17-, O99.33-, Z72.0		