

Mental Health and Substance Use Disorder Services 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.
- Substance use disorder (SUD) services provided by mental health providers during mental health 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 visits 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.
- ✓ 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.
- ✓ 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.

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

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

Addendum Instructions

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

- **Providers** (not FTE) by type who provided mental health and/or substance use disorder treatment in Column a1. The provider can be counted once in each service category if they provide both services.
 - ✓ For MH Service Detail, count MH treatment provided by Physicians (other than psychiatrists), Nurse Practitioners, Physician Assistants, or Certified Nurse Midwives.

- ✓ For SUD Detail, count SUD treatment provided by Psychiatrists, other Physicians, Nurse Practitioners, Physician Assistants, Clinical Nurse Midwives, Licensed Clinical Psychologists, and Licensed Clinical Social Workers, or Other Licensed Mental Health Providers including Psychiatric Nurse Practitioners.
- ✓ Contract providers paid by the visit are not reported in the FTE columns in the main portion of Table 5, but they will be reported in the *Selected Service Detail* section. 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.
 - ✓ Report visits that include treatment for MH on the addendum Lines 20a01 through 20a04 and treatment for SUD services on the addendum Lines 21a through 21h.
 - ✓ 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.
 - Include *at minimum* all visits in which the reported providers coded ICD-10 codes specified on Table 6A, Lines 18 through 19a for substance use disorder treatment provided as part of a mental health or medical visit and Lines 20a through 20d for mental health treatment provided as part of a medical visit.
 - ✓ *Exclude* visits 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.
 - ✓ See the [Virtual Visit Reporting Guidance](#) for specific requirements for reporting virtual visits.
- **Patients** seen for these services by provider type in Column c.
 - ✓ Report patients who had visits that include treatment for MH on the addendum Lines 20a01 through 20a04 and patients who had visits that include treatment for SUD services on the addendum Lines 21a through 21h.
 - ✓ Report the number of patients seen for a clinic (in-person) or virtual mental health or substance use disorder service by provider(s) in the given line.
 - ✓ Report patients (and their visits) who were seen during the year for these services by each type of provider listed. This may result in the same patient appearing on more than one line in the addendum.

Example Scenarios

Scenarios are arranged below by topic area with guidance for UDS reporting of mental health and substance use disorder activity on the main part of Table 5 and the selected services addendum of Table 5.

Integrated Visits

When a medical provider delivers mental health 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 mental health provider provides substance use disorder 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).

Situation	Note
<p>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).</p>	<p>The visit will be reported in three different places on Table 5:</p> <ul style="list-style-type: none"> ✓ Report the visit provided by the family physician and the physician’s full-time equivalent (FTE) in the main part of Table 5 on Line 1, and include the patient in the total on Line 15. ✓ Report the depression treatment provided by the physician (personnel, visit, and patient) in the MH <i>Selected Service Detail</i> addendum, Line 20a01. ✓ Report the treatment provided for OUD (personnel, visit, and patient) in the SUD <i>Selected Service Detail</i> addendum, Line 21a.
<p>A licensed clinical psychologist sees a patient for depression complicated by an alcohol-related disorder.</p>	<p>The visit is reported in two different places on Table 5:</p> <ul style="list-style-type: none"> ✓ 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 total on Line 20. ✓ Report the alcohol-related treatment provided by the clinical psychologist (personnel, visit, & patient) in the SUD <i>Selected Service Detail</i> addendum, Line 21f.

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.

Situation	Note
A nurse practitioner (NP) evaluates and discusses an anti-depressant regimen by phone with the patient.	<p>This virtual visit will be reported twice on Table 5:</p> <ul style="list-style-type: none"> ✓ 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 total on Line 15. ✓ Report the mental health treatment services provided by the NP (personnel, virtual visit, & patient) in the <i>MH Selected Service Detail</i> addendum, Line 20a02.
An internist discusses a refill of antidepressant medication with a patient.	Do not count the interaction 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.

Clarifications

This section includes references for UDS Tables that are referred to in this file that will support your understanding of the Mental Health and Substance Use Disorder Services Detail Addendum. It includes table snippets mentioned throughout the file, including specific line references.

Main part of Table 5, Medical – Describes the activity reported in the Total Medical Care Services section, Table 5, 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	Total Physicians (Lines 1–7)				
9a	Nurse Practitioners				
9b	Physician Assistants				
10	Certified Nurse Midwives				
10a	Total NPs, Pas, and CNMs (Lines 9a–10)				
15	Total Medical Care Services (Lines 8 + 10a through 14)				

Main part of Table 5, Mental Health – Describes the activity reported in the Total Mental Health Services section, Table 5, 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				
20c	Other Mental Health Personnel				
20	Total Mental Health Services (Lines 20a–c)				

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	Substance Use Disorder Services				

Addendum, Mental Health Service Detail – 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 Detail – 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-CM Code	Number of Visits by Diagnosis Regardless of Primacy (a)	Number of Patients with Diagnosis (b)
Selected Mental Health Conditions, Substance Use Disorders, and Exploitations				
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		

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-CM Code	Number of Visits by Diagnosis Regardless of Primacy (a)	Number of Patients with Diagnosis (b)
Selected Mental Health Conditions, Substance Use Disorders, and Exploitations				
18	Alcohol-related disorders	F10-, G62.1, 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		