

Worksheet 1: Patient Profile Reporting Requirements

Section A

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data?**	Do you need to manipulate your source data for UDS reporting? How?
ZIP Code	ZIP Code	<ul style="list-style-type: none"> Address 	<i>Example: Intake</i>	<i>Example: Patient Registration System, EHR</i>	<i>Example: Aggregate ZIP Codes with <10 patients</i>
All	Patient Status	<ul style="list-style-type: none"> Visit type 			
3A	Age	<ul style="list-style-type: none"> Birth date 			
3A	Sex	<ul style="list-style-type: none"> Sex 			
3B	Ethnicity	<ul style="list-style-type: none"> Hispanic (yes/no) 			
3B	Race	<ul style="list-style-type: none"> Race categories (multi-select) 			
3B	Language	<ul style="list-style-type: none"> Language 			
3B	Sexual Orientation	<ul style="list-style-type: none"> Sexual orientation categories 			
3B	Gender Identity	<ul style="list-style-type: none"> Gender identity categories 			
4	Special Population	<ul style="list-style-type: none"> Veteran Homeless/housing Agricultural worker (migrant/seasonal) School-based Public housing (site) 			

* Timing of how often the data is collected will depend on data element.

** Sources of data might include: EHR, Internal System, Payers, etc.

Worksheet 2: Clinical Services and Quality Indicators Reporting Requirements

Section A

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data?***	Do you need to manipulate your source data for UDS reporting? How?
5	Office Visit	<ul style="list-style-type: none"> • Visit type 	<i>Example: Provider</i>	<i>Example: EHR</i>	<i>Example: Not all interactions count as visits (e.g., immunizations)</i>
5	Clinic vs. Virtual Visit	<ul style="list-style-type: none"> • Visit code, place of service, modifiers 			
5	Paid Referral Visits	<ul style="list-style-type: none"> • Visit type • Form of payment (FFS/Hourly) 			
5	Nursing home, Hospital, Respite Care, Home Visit, Other	<ul style="list-style-type: none"> • Visit location 			

Section B

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data?***	Do you need to manipulate your source data for UDS reporting? How?
6A	Visits by Diagnosis	<ul style="list-style-type: none"> • ICD code on visit 			
6A	Visits by Service	<ul style="list-style-type: none"> • CPT or ADA code on visit 			

* Timing of how often the data is collected will depend on data element.

*** Sources of data might include: EHR, internal system, payers, external systems (e.g. immunization registries), etc.

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data?***	Do you need to manipulate your source data for UDS reporting? How?
6B/7	Disease Management Measures: <ul style="list-style-type: none"> • Use of Appropriate Medications for Asthma • Statin Therapy for Prevention & Treatment of Cardiovascular Disease • IVD: Use of Aspirin or Another Antiplatelet • HIV Linkage to Care • Controlling High Blood Pressure • Diabetes HbA1c Poor control 	<ul style="list-style-type: none"> • Patient age • Race/ethnicity (for table 7 measures) • Number and service category of visit • Date of diagnosis onset • ICD code on visit • CPT code on visit • Treatment information • Lab and procedure results 			
6B	Preventive Care Measures: <ul style="list-style-type: none"> • Childhood Immunization Status • Weight Assessment & Counseling for N&PA for Children • BMI Screening and Follow-Up (adults) • Tobacco Use: Screening & Cessation Intervention • Screening for Depression & Follow Up Plan • Dental Sealants for Children 6-9 Years 	<ul style="list-style-type: none"> • Patient age • Number and service category of visit • CPT code on visit • ICD code on visit • Screening and follow-up information 			

* Timing of how often the data is collected will depend on data element.

*** Sources of data might include: EHR, internal system, payers, external systems (e.g. immunization registries), etc.

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data?***	Do you need to manipulate your source data for UDS reporting? How?
6B/7	Women's Health <ul style="list-style-type: none"> • Early Entry into Prenatal Care • Cervical Cancer Screening • Low Birth Weight 	<ul style="list-style-type: none"> • Patient age and sex • Date of LMP • Number and service category of visit • CPT code on visit • ICD code on visit • Screening information • Birth outcome information • Race/ethnicity (for table 7 measure) 			

* Timing of how often the data is collected will depend on data element.

*** Sources of data might include: EHR, internal system, payers, external systems (e.g. immunization registries), etc.

Section C

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data?**	Do you need to manipulate your source data for UDS reporting? How?
6B	Provide Prenatal Care by Referral Only	<ul style="list-style-type: none"> • Yes or No 			
7	Number of HC Patients Who are Pregnant and HIV-Positive	<ul style="list-style-type: none"> • HIV status • Pregnancy status 			
7	Number of Deliveries Performed by HC Providers	<ul style="list-style-type: none"> • Deliveries performed at health center • Deliveries performed during rounding 			
6B	Number of Prenatal Care Patients	<ul style="list-style-type: none"> • Patients with any prenatal service 			
6B	Entry Into Prenatal Care	<ul style="list-style-type: none"> • Date of first prenatal visit • Date of LMP 			
6B	Location Where Prenatal Care Started	<ul style="list-style-type: none"> • Health center • Other 			
7	Delivery	<ul style="list-style-type: none"> • Date of delivery • Race/ethnicity of mother 			
7	Birth Outcome	<ul style="list-style-type: none"> • Stillbirth • Live birth • Single or multiples • Birthweight • Race/ethnicity of baby 			

* Timing of how often the data is collected will depend on data element.

** Sources of data might include: EHR, internal system, payers, external systems (e.g. immunization registries), etc.

Worksheet 3: Financial and Operational Profile Reporting Requirements

Section A

Table	Data Element	What data are collected and how often?*	Who is responsible for collecting this?	What is the source for this data?***	Do you need to manipulate your source data for UDS reporting? How?
5	Staffing	<ul style="list-style-type: none"> • Employees, interns, volunteers, contract staff, residents 	<i>Example: HR</i>	<i>Example: Payroll</i>	<i>Example: Track time and services for all categories of providers</i>
5	FTE	<ul style="list-style-type: none"> • Start/termination date • Employment type • Hours worked 			
5	Allocation by service	<ul style="list-style-type: none"> • FTE time allocated to each function • Head count of medical staff providing MH or SUD • Head count of mental health staff providing SUD 			
8A	Total Costs by Service	<ul style="list-style-type: none"> • Staffing costs • Other direct costs • Contract costs, including pharmacy 			
8A	Overhead Allocation	<ul style="list-style-type: none"> • Method • Square footage • Admin utilization by cost center 			
8A	Value of In-Kind and Donated	<ul style="list-style-type: none"> • Replacement value of donated staff, supplies, equipment, services 			

* Timing of how often the data is collected will depend on data element.

** Sources of data might include: EHR, Internal System, Payers, etc.

Section B

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data? **	Do you need to manipulate your source data for UDS reporting? How?
4	Patient Income	<ul style="list-style-type: none"> Income 			
4, 9D	Eligibility for Sliding Fee	<ul style="list-style-type: none"> Income 			
ZIP, 4, 9D	Insurance	<ul style="list-style-type: none"> Primary medical insurance Patient address (ZIP) 			
9D	Charges by Payer	<ul style="list-style-type: none"> Undiscounted, unadjusted charges Contract pharmacy 			
9D	Collections by Payer	<ul style="list-style-type: none"> Cash received in 2019 Payers Contract pharmacy 			
4	Managed Care Enrollment	<ul style="list-style-type: none"> Member enrollment by month 			
9D	Managed Care Revenues	<ul style="list-style-type: none"> Cash received in 2019 Payers 			
9D	Adjustments by Payer	<ul style="list-style-type: none"> Cash received in 2019 Retro payments Wrap payments 			
9D	Sliding Fee Discounts	<ul style="list-style-type: none"> Income 			
9D	Self-Pay Bad Debt	<ul style="list-style-type: none"> Amount written off accounts 			

* Timing of how often the data is collected will depend on data element.

** Sources of data might include: EHR, Internal System, Payers, etc.

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data?**	Do you need to manipulate your source data for UDS reporting? How?
9E	List of Grants, Contracts, and Indigent Care Programs	<ul style="list-style-type: none"> • Scope of grant • Funding streams • Cash received in 2019 			
9E	Drawdowns by Source	<ul style="list-style-type: none"> • Cash drawn down in 2019 			
9E	Other Cash Revenue	<ul style="list-style-type: none"> • Cash received in 2019 • Fund-raising • Interest income • Rent from tenants • Medical records fees • Individual monetary donations • Vending machines • Pharmacy sales to the public 			

* Timing of how often the data is collected will depend on data element.

** Sources of data might include: EHR, Internal System, Payers, etc.

Section C

Table	Data Element	What data are collected?*	Who is responsible for collecting this?	What is the source for this data?***	Do you need to manipulate your source data for UDS reporting? How?
HIT	EHR Implementation and Use	<ul style="list-style-type: none"> • Vendor • Product • Version • Electronic uses/exchanges • Social risk factors 			
Other	Telemedicine	<ul style="list-style-type: none"> • Technologies used • With who • Services provided 			
Other	MAT	<ul style="list-style-type: none"> • DATA waiver providers • Patients treated under DATA waiver 			
Other	Outreach and Enrollment	<ul style="list-style-type: none"> • Assists 			
Work	Workforce Training and Staffing	<ul style="list-style-type: none"> • Staff provided health professional training • Staff preceptors • Trainers • Dates of trainings 			

* Timing of how often the data is collected will depend on data element.

** Sources of data might include: EHR, Internal System, Payers, etc.