Mental health is more than the control or absence of mental illness. Mental health is vital for general health. It is defined as “A state of successful performance of mental and physical functioning resulting in productive activities, fulfilling relationships with others, and the ability to adapt to change and cope with adversity.” — U.S. Surgeon General David Satcher, 1999

**Benefits of MHI**

**Higher quality care.** Studies show that an organized system of collaborative mental health care can improve every phase of care by identifying more people who need treatment; promoting treatment adherence; and reinforcing ongoing patient/family contact and support.

**Better outcomes.** Patients with depression in routinized MHI clinics were 54% less likely to use higher-order ED visits.

**Higher satisfaction for patients and providers.** Intermountain compared responses to satisfaction surveys before and after MHI was in place:

- **Patients** indicated improvement in multiple aspects of care, including physicians listening to concerns and quality of coordinated care.
- **Providers** reported improvement in a series of operational areas, including ability to detect mental health needs, competence in working on the mental health and social needs of patients, and ability to integrate the MHI team in primary care.

**What’s New in this update?**

- **New roles:** MHI coordinator and health advocate (page 1)
- **MHI implementation and measures, including an MHI dashboard (page 2)
- **Patient Health Questionnaire - Adolescent (PHQ-A) (pages 2 and 4)
- **“Why use MHI packets?” (page 3)

**What is MENTAL HEALTH INTEGRATION (MHI)?**

**Mental Health Integration (MHI)** is collaborative mental health care that is integrated into everyday primary care practice. Following are key features of MHI:

- **It’s team-based.** PCPs and office staff collaborate with care managers and mental health specialists to implement individualized strategies for patients and families. This improves clinical decisions, helps patients and families receive services within primary care, and reduces PCP burden. MHI team members and their roles:
  - **Primary care provider (PCP):** Initiates MHI process, prepares the patient and family for the team approach, and leads the team with the help of the clinic manager and staff.
  - **Patient and family:** Act as major partners in treatment, and are provided opportunities for education to help them take an active role.
  - **MHI coordinator:** Orient patients and families to MHI, coordinates MHI team, and enters packet information into the electronic medical record (EMR).
  - **Care manager and/or health advocate:** Follows up with patients and families to educate them and improve treatment adherence, tracks outcomes, and reports to the team.
  - **Mental health specialist (MHS):** A PhD, MSW, APRN, psychiatrist, or other licensed mental health professional who works with the PCP to clarify the patient’s diagnosis and helps determine complexity and plan treatment. Consults with the PCP and supports treatment of patients and families.
  - **National Alliance on Mental Illness (NAMI):** Provides patients and families with education, group-based support, and peer mentoring.

- **It’s outcome-oriented.** MHI helps the team set meaningful goals, provide appropriate follow-up, and track outcomes.

- **It addresses complexity.** Mental health disorders can be comorbid with other chronic diseases such as diabetes and CHF. Integrated treatment within a team environment better manages this complexity.

- **It’s standardized and supportive.** MHI follows a standard, yet flexible, process that facilitates communication and coordination of care, improves access to resources, enhances team members’ existing expertise, and helps members excel in their respective roles.

- **It supports Intermountain’s Triple Aim for population health.** The Triple Aim improves the quality of health, enhances the customer experience, and lowers the cost of care.

Increasingly, the responsibility for providing mental health care falls to primary care providers (PCPs). This care process model (CPM) provides a high-level overview of the mental health integration (MHI) process to help PCPs provide effective mental health care to their patients.
**MHI IMPLEMENTATION AND MEASURES**

MHI implementation has 3 levels, as identified at right.

The MHI team uses a team-based scorecard and dashboard to measure each of the items listed as clinics move through the implementation process.

The MHI dashboard measures patient outcomes associated with mental health. See page 4 for more information.

**LEVEL 1: Potential**
- **Team:** Allocation planning initiated
- **Workflow:** Team review; barriers identified
- **Information systems:** Information workflow design; MHI scorecard initiated
- **Cost:** ER visits/admits
- **Community resources:** Resources identified; recruiting initiated

**LEVEL 2: Adoption**
- **Team:** Identified and/or hired
- **Workflow:** Clinic process designed; MHI tools in use; PHQ-2 and PHQ-9 used often
- **Information systems:** Information workflow design initiated; MHI scorecard used
- **Cost:** ER visit rate decrease by 10%; admit decrease by 5%
- **Community resources:** Resources in place and used

**LEVEL 3: Routinized**
- **Team:** Engaged; resource deployment monitored and discussed at regular meetings
- **Workflow:** Clinic process in use; MHI normalized; PHQ-2 and PHQ-9 used consistently
- **Information systems:** EMR and dashboard in use
- **Cost:** ER visit rate decrease by 20%; admit decrease by 10%
- **Community resources:** Resources in place and used for follow up and maintenance

**ALGORITHM NOTES**

(a) **Importance of timely evaluation and treatment:** Patients with mental health concerns should be evaluated and treated as soon as possible.

(b) **Baseline evaluation packets:** See page 4 for a list of packets and tools in each packet.

(c) **Assessment, suicide screen:** Use the PHQ-9 or PHQ-A (question 9 of both and questions 12 and 13 of PHQ-A deal with suicide ideation), plus near-term suicide risk factors (e.g., anxiety, psychotic symptoms, active substance abuse, access to firearms).

(d) **Adolescent patients:** Determine which Baseline Packet to use based on clinical judgment, following these guidelines:
   - For younger/less mature patients, give the Child and Adolescent Baseline Packet to the parent to complete, and the PHQ-A to the patient to complete.
   - For older/more mature patients, give the Adult Baseline Packet, and replace the PHQ-9 with the PHQ-A.

(e) **Scoring:** Office staff can score the packets. See page 4 for resources to help evaluate packets and determine scores.

(f) **DSM summary:** A Summary of DSM-IV criteria is available now; a summary of DSM-5 criteria will be available fourth quarter 2013; see the list of resources on page 4.

(g) **Tracking scores:** The tracking sheets help you record scores for the initial evaluation and two follow-ups (see page 4).

(h) **Stratifying complexity and severity:** Use this form to summarize scores, assess overall complexity and severity of the patient’s condition, and record diagnosis and care plan (see page 4).

**MHI PROCESS OVERVIEW**

These algorithms outline how to use MHI tools and resources to evaluate and manage mental illness in a primary care setting. The process can be modified to fit the workflow of an individual office, the needs of the patient and family, and the PCP’s clinical judgment.

**ALGORITHM: DIAGNOSIS**

**PATIENT/PARENT presents with possible mental health concerns**

**Via phone**
- Schedule appointment. (a)
- Mail MHI Baseline Evaluation Packet to parent/patient to complete before appointment. (b)

**During regular appointment**
- Do brief mental health assessment, including suicide screen. (c)
- Schedule follow-up appointment. (a)
- Give MHI Baseline Evaluation Packet to patient/parent to complete before next appointment. (b)

For pediatric patients, explain to parent(s) that diagnosing mental health conditions depends on information from both parents and teachers.

For adolescent patients, give the PHQ-A with the Baseline Evaluation Packet. (d)

**PATIENT/PARENT: Provides information by completing MHI packets**

1. Patient/parent completes the Baseline Evaluation Packet(s), and (for pediatric patients) the parent coordinates evaluation with the child’s school. (b)
2. Patient/parent brings the completed packet(s) to the appointment.

**PCP: Primary care mental health visit with complete MHI packets**

1. Perform medical history/physical exam.
2. Score the Baseline Evaluation Packet(s). (e)
3. Make initial diagnosis based on DSM criteria. (f)
4. Review the packet and scores with the patient/parent.
5. Record appropriate details on the Score Tracking Sheets (g) and the MHI Stratification and Care Plan. (h)

Go to Treatment Algorithm
**ALGORITHM: TREATMENT**

**EVALUATE severity and complexity; determine level of team management**

Use clinical judgment and scoring guides (see page 4) to evaluate severity and complexity (i) and determine team management level (j). Risk of suicide or other danger places the patient in the highest category.

<table>
<thead>
<tr>
<th>Mild severity and complexity</th>
<th>Moderate severity and complexity</th>
<th>High severity and complexity OR danger risk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routine Care</td>
<td>Collaborative Care</td>
<td>Collaborative Care or Referral</td>
</tr>
</tbody>
</table>

**Treatment Plan**

**Who:** PCP, care manager/health advocate as needed, NAMI (k)

**What:** Use MHI guidelines and tools to guide care within primary care environment.

**INITIATE Treatment Plan**

1. Initiate treatment plan at appropriate level of MHI team involvement (see above).
2. Follow the diagnosis-specific care process model when available. (n)

**ONGOING FOLLOW-UP**

With MHI team:

3. Continue to follow up with patient and monitor progress.
4. Use appropriate Follow-up Evaluation Packets to evaluate improvement. (o)
5. Record details on Score Tracking Sheets and encoded data in EMR. (g)

**Patient improving?**

- yes
- no

**RECONSIDER Treatment Plan**

6. Consider stepping up level of team management.
7. Refer to mental health specialist as needed. (l,m)

**WHY USE MHI PACKETS?**

MHI packets bring together objective evaluation tools to help identify and track mental health symptoms, impairment, and comorbidities that may otherwise be overlooked. The MHI packets and individual tools are not meant diagnose, but are valuable in gathering information needed to make a diagnosis. MHI packets should not be used without clinical judgment and clinical correlation.

The MHI evaluation tools were either derived and used with permission from other well-known and validated sources, or created by Intermountain following evidence-based clinical practice and recommendations of nationally recognized organizations. Intermountain clinics have been using these forms for 10 years with positive results.

**ALGORITHM NOTES**

(i) Using scores to evaluate severity and complexity: The scoring guides (see page 4) provide guidance for this task. General factors that affect complexity include symptom severity, psych and physical comorbidities, impairment, and family relational style.

(j) Choosing team management: Along with the results of the mental health assessment, consider these factors when determining the level of team management:

- Care management benefits people with moderate/severe depression more than those with mild depression.
- Some clinicians have more interest and capability than others in caring for complex or severe cases.
- Resource levels vary among practices and communities.

(k) National Alliance on Mental Illness (NAMI): If the patient desires, the care manager or health advocate can work with NAMI to arrange for a peer mentor and support group.

(l) Mental health specialist: PhD, MSW, APRN, psychiatrist, or other licensed mental health provider.

(m) Referral: Not all patients can be treated in primary care. Use your clinical judgment and factors such as suicidality to decide whether patients need to be referred for treatment.

(n) Related CPMs: Intermountain has multiple care process models on mental health disorders (see page 4).

(o) Follow-up evaluation packets: See page 4 for a list of tools in each packet.
MHI TOOLS OVERVIEW

Intermountain’s MHI tools assist in evaluation, care planning, and communication within primary care. Standardized packets contain assessments designed to help evaluate symptoms and identify issues that may affect treatment or to evaluate and track progress and outcomes. Use the packets or choose specific tools based on individual needs.

Baseline evaluation

For adults

- **Adult Baseline Packet**
  - Cover Letter
  - Initial History and Consultation
  - Family Rating Scale
  - Patient Health Questionnaire (PHQ-9)•
  - Anxiety/Stress Disorder Symptom Rating Scale
  - Mood Disorder Questionnaire (MDQ)
  - Adult ADHD Self-report Scale
  - Mood Regulation Symptom Rating Scale

For children and adolescents

- **Child & Adolescent Baseline Packet**
  - Cover Letter
  - Initial History and Consultation
  - Parental Screen and Family Rating Scale
  - Vanderbilt ADHD PARENT Rating Scale
  - Depression Symptom Rating Scale
  - Anxiety/Stress Disorder Symptom Rating Scale
  - Developmental Disorders Symptom Rating Scale
  - Mood Regulation Symptom Rating Scale
  - Home Impairment Scale

Follow-up evaluation

For adults

- **Adult Follow-up Packet**
  - Cover Letter
  - Follow-up Consultation
    - which includes evaluation of medication side effects and progress improvement
  - All tools in the Baseline Packet except the Initial History, Family Rating Scale, and Mood Disorder Questionnaire (MDQ)

For children and adolescents

- **Child & Adolescent Follow-up Packet**
  - Cover Letter
  - Follow-up Consultation
  - All tools in the Baseline Packet except the Initial History, Parental Screen and Family Rating Scale, and Developmental Disorders Symptom Rating Scale

Follow-up School Packet

- Cover Letter
  - Vanderbilt ADHD TEACHER Rating Scale
  - School Impairment Scale

Scoring, stratifying severity/complexity, and planning care

**Tools**

- **Guide** for scoring packets, determining severity and complexity, and planning care
- **Care Plan** used to document diagnosis and severity level; provides an integrated picture of the patient’s level of need and MHI team plan
- **Scoring sheets** used to summarize scores from the packets

**Adul**ts

- Scoring and Evaluating Adult MHI Forms
- MHI Stratification and Care Plan: Adult
- Adult Scoring Sheet

**Children & adolescents**

- Scoring and Evaluating Child and Adolescent MHI Forms
- MHI Stratification and Care Plan: Child & Adolescent
- Child and Adolescent Scoring Sheet

References


**MHI TOOLS AND RESOURCES**

Access this CPM and other resources from the Mental Health Integration or Mental Health and Behavior topic pages, accessible from intermountainphysician.org/ClinicalPrograms or intermountain.net/ClinicalPrograms. Click “M” from the “Clinical Topics A-Z” list on the right side of the screen, and choose Mental Health Integration or Behavior.

You can also order these materials from i-printstore.com.

**MHI dashboard**

Access the MHI dashboard on the Reports page of intermountain.net. If you don’t have access to this report, follow the directions to request access on the Primary Care Clinical Program page.

Related care process models

Intermountain CPMs provide evidence-based guidance for diagnosis and treatment of mental disorders:

- Attention Deficit Hyperactivity Disorder
- Bipolar Disorder
- Chronic Pain
- Depression
- Eating Disorders
- Suicide Prevention
- ADHD
- ADHD: Tips for Teachers
- ADHD: Talking to Your Child’s or Teen’s Teachers
- Behavioral Health Unit: Basics for Your Stay
- MHI: Mental Health Services In Your Doctor’s Office