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APPENDIX A

Mental Health Wellness Examination Overview and Requirements

The **Mental Health Wellness Examination** is performed by a licensed mental health professional* or by a primary care provider. The **Mental Health Wellness Examination** is defined by law to consist of a screen or assessment that seeks to identify any behavioral or mental health needs and appropriate resources for treatment. The Mental Health Wellness Examination is defined as:

1. Observation, a behavioral health screening, education, consultation on healthy lifestyle changes, referral to ongoing treatment, mental health services, other necessary supports, and discussion of potential options for medication;
- and
2. Age-appropriate screenings or observations to understand a covered person's mental health history, personal history, mental or cognitive state and, when appropriate, relevant adult input through screenings, interviews, and questions.

The **Mental Health Wellness Examination** may be provided by the primary care provider as part of the annual preventive visit, with systems in place to charge for both.

We recommend that health plans share the information with insured members that this new coverage is available.

We would further recommend that each patient be made aware during the exam/visit that this visit constitutes the annual **Mental Health Wellness Examination** and that there may be follow-up services necessary. This communication also raises awareness of this new coverage and eliminates redundancy from multiple providers.

Component parts of the **Behavioral and Mental Health Wellness Examination** include:

- 1) **History**
 - a. Current mental health concerns; as described by the patient, parent, or guardian;
 - b. Past and current mental health diagnoses;
 - c. Social history, including family and relationship status; social determinants of health; use of tobacco, alcohol, cannabis and derivatives, and other substances;
 - d. History of exposure to trauma or violence/adverse childhood events;
 - e. Gender identity and sexual orientation;
 - f. Family history of mental illness;
 - g. A review of systems to include anxiety/panic; guilt/hopeless; self- injurious or risky behavior; depression; somatic symptoms; suicidal thoughts or plans;
 - h. School or work performance; and
 - i. Use of social media.

- 2) **Brief Mental Health Exam** includes elements of appearance, behavior, agitation, speech, mood, affect, thought process and content, orientation, cognition, insight, and judgment.
- 3) One or more **Screening Tests** appropriate for the patient's age
 - a. The purpose of the screening test will be to methodically search for mental health problems that may not be evident based on the History and Mental Health Examination.
 - b. Age-appropriate screening tool will be chosen from the "toolkit."
 - c. All tests in the screening tools have been validated.
 - d. At least one screening test that is appropriate for each age range will be conducted.
 - e. Plans should not require a specific tool but allow the clinician to make the determination.
- 4) **Shared Decision Making**
 - a. Shared decision making may include education and counseling on healthy lifestyle changes and discussion of the need for further evaluation and treatment.
- 5) **Outcome and recommendations**
 - a. Summarize findings and interventions provided.
 - b. Provide diagnosis if appropriate *but not required for payment*.
 - c. Education around behavioral lifestyle changes, reinforcement of healthy behavior (catch someone doing well), documentation of strengths, and provision of positive supports (motivational interviewing, etc.).
 - d. Explicit next steps and reference to any outcomes and/or recommendations documented as evidence the Mental Health Wellness Examination was performed as a *modular separately identifiable service* for billing.
- 6) Behavioral Health Screening **Toolkit****

1. There are three options for the execution of the Mental Health Wellness Examination:
 - a. Licensed Mental Health Professional alone;
 - b. Primary Care Provider alone; or
 - c. Integrated into the annual wellness PCP visit as a combination of both.
2. The Mental Health Wellness Examination may require 20-60 minutes to provide.
3. The Mental Health Wellness Examination is a screening and assessment examination with an educational component and outcome recommendations.
4. The Mental Health Wellness Examination identifies behavioral health needs and appropriate resources and/or treatments.
5. Prevention is a key aspect to the Mental Health Wellness Examination in which issues are identified early and outcomes/recommendations documented to promote healthy behaviors.
6. Outcomes/Recommendations may include, but not be limited to:
 - a. Tracking ACES and/or social determinants of illness;
 - b. Supporting wellness and self-care activities;
 - c. Emerging behavioral health diagnoses;
 - d. A single session of psychoeducation/motivational interviewing;

- e. Use of Artificial Intelligence or smart phone Apps;
 - f. Referral to another skilled provider; and
 - g. Activation of the Behavioral Healthcare System.
7. This is not a treatment statute.
 8. Documentation requirements for this Mental Health Wellness Examination must be a *separately identifiable service* from the medical documentation of the PCP visit.
 9. Any positive screens must include recommendations for these positive findings.
 10. There should be a clear understanding of next steps generated by the findings of the Mental Health Wellness Examination.

*Licensed Mental Health Professional is a licensed physician who specializes in the practice of psychiatry, a licensed psychologist, a licensed supervised mental health counselor, a licensed independent clinical social worker, a licensed certified social worker, a licensed mental health counselor, a licensed psychiatric nurse mental health clinical specialist, a licensed psychiatric mental health nurse practitioner, a licensed physician assistant who practices in the area of psychiatry, a licensed alcohol and drug counselor I, or a licensed marriage and family therapist with the lawful scope of practice for such therapist.

**Behavioral Screening Toolkit is not an exhaustive or exclusive list of validated screening tools. It is intended that the evolution of the field may allow newer tools as they are developed and chosen by the PCP or Licensed Mental Health Professional performing the examination. These screening tools are an aid for a comprehensive assessment of an individual's behavioral and mental health status. Included may be toolkits developed by Boston Children's Hospital, Massachusetts Medical Society, Massachusetts Health & Hospital Association, Massachusetts Psychiatric Society, or national healthcare agencies.