

WILDA L. WHITE [justice through
words and ideas]

Certified Peer Support Provider
Vermont-Specific
Curriculum

Phase 2: Mental Health Peer Certification Stakeholder Process

Tuesday, July 25, 2023

Via Zoom

Wilda L. White, Facilitator

Zoom Protocol



Questions	Raise hand, actual or virtual; write question in Chat; or shout it out
Comments	Zoom Chat
Slides	Link to PowerPoint slides is in Zoom Chat
Recording	All meetings are being recorded

Background

Certified Peer Support Provider Vermont-Specific Curriculum

What are the meetings about?

The Department of Mental Health (DMH) is partnering with the Peer Workforce Development Initiative (PWDI) to identify a model and develop an implementation plan for peer specialist credentialing in Vermont.

PWDI is facilitating a series of stakeholder meetings solicit feedback about the development of a statewide peer support provider certification program in the State of Vermont. Wilda White will be overseeing these stakeholder meetings. DMH will participate in these meetings along with representatives from other Vermont stakeholders including service users and their families; peer support specialists; staff from community mental health programs, hospitals, and peer-run service organizations; family networks and organizations; the recovery community and mental health advocates; private insurers; and staff from other State agencies.

Recommendations from these meetings will be compiled by Wilda White for use in developing a peer support provider credentialing process in Vermont.

What is the PWDI

Department of Mental Health (DMH) developed the Peer Workforce Development Initiative (PWDI) grant to help the state build and maintain an infrastructure for a statewide mental health peer workforce.

Initiative goals include creating a steering committee, evaluating statewide peer workforce needs, and ensuring the availability of peer support worker training.

DMH awarded PWDI grant to Pathways Vermont.

PWDI Steering Committee

Hilary Melton Pathways Vermont	Tara Miller Lamoille County Mental Health Services
Walt Wade Vermont Psychiatric Survivors	Malaika Puffer HCRS
Dan Towle Parker Advisors	Gloria van den Berg Alyssum
Amey Dettmer Copeland Center	Ken Russell Another Way Community Center
Will Eberle Vermont Association for Mental Health and Addiction Recovery (VAMHAR)	Leslie Nelson Howard Center

About the Facilitator



Wilda L. White

Education:

JD, MBA

Occupation:

Management Consultant

Passion:

Justice for all

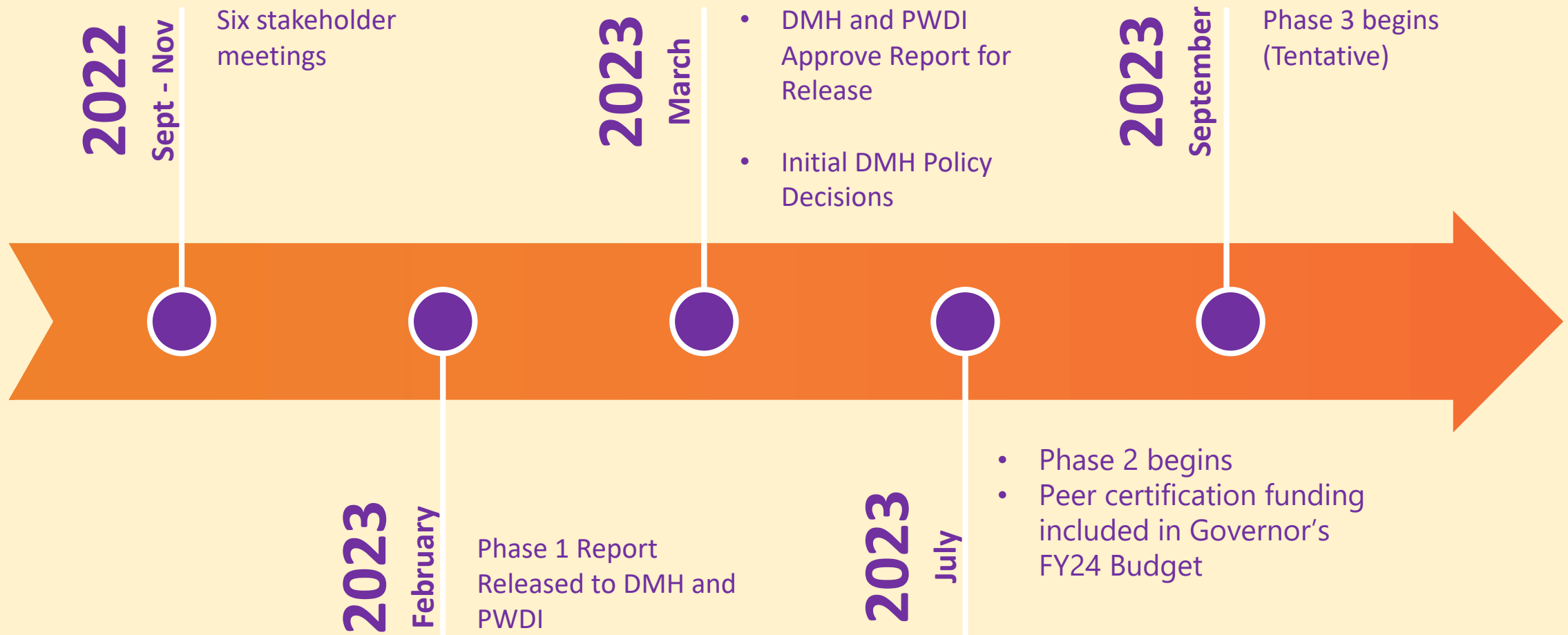
Experience

- Principal, Wilda L. White Consulting
- Founder, MadFreedom, Inc.
- Executive Director, Vermont Psychiatric Survivors
- Executive Director, Center for Social Justice, UC Berkeley School of Law
- Partner, Walker, Hamilton & White (San Francisco, CA)
- General Management Consultant, McKinsey & Company (San Francisco, CA)
- Assistant City Editor, *The Miami Herald* (Miami, FL)

Relevant Publication

“Peer Specialist Certification: An Analysis of U.S. and Canadian Efforts to Promote and Expand Mental Health Peer Specialist Workforce Capacity,”
February 2021

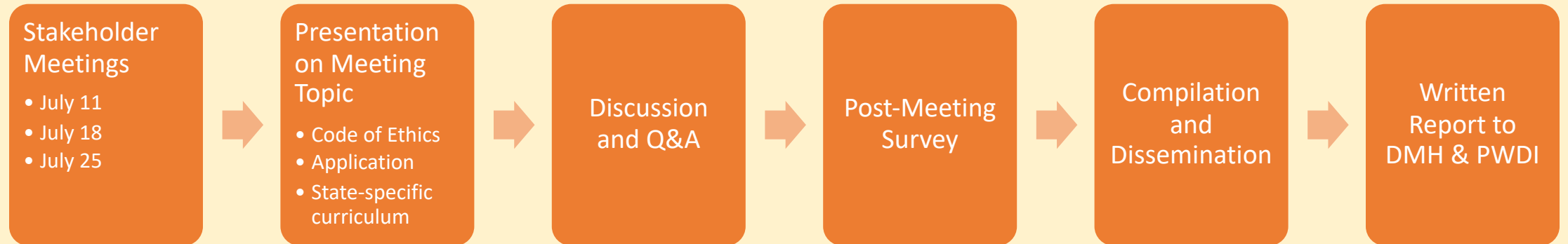
Peer Support Certification Timeline



Overview of Phase 2

Certified Peer Support Provider Vermont-Specific Curriculum

Phase 2 Meeting Process



Screening Application Survey Results

Certified Peer Support Provider Vermont-Specific Curriculum

Survey Responses

Five respondents

- Four surveys; one email

Respondents overwhelming supported the Screening Application as written

- Exception: clarification requested about provisional status versus certification
- Exception: suggestion to include examples of what applicant might write about in Personal Statement section

Revisions to Revised Application

- Added an Introduction
- Added a Table of Contents
- Reorganized definition of “lived experience”
- Included a hyperlink to definition of “lived experience” in eligibility section of Application
- Revised explanation of Provisional Status and Certification
- Revised question regarding Certification or Provisional Status
- Included a diagram of path to Provisional Status
- Reorganized description of certification process to separate certification process from re-certification process

Revised Screening Application



URL

- <https://peercertification.wildalwhite.com/yckt2yrk>

QR Code



Vermont-Specific Curriculum

Certified Peer Support Provider Vermont-Specific Curriculum

Overview of Vermont-Specific Curriculum

- Start with Core Competencies
- Identify Core Competencies not covered by
 - IPS
 - WRAP
 - Alternatives to Suicide/When Conversations Turn to Suicide
 - Hearing Voices
- Goal is to keep overall training to \leq 90 hours

Relevant Core Competencies

Number	Core Competency
12	Links to resources, services and supports: Peer support providers journey with others in their efforts to obtain the resources, services, and supports they need within mental health and community settings and beyond. Peer support providers share knowledge about available resources, continually develop their knowledge of available resources, and understand when and to whom to reach out for assistance.
14	Medicaid and Insurance-Related Requirements: Peer support providers in programs receiving insurance reimbursement, including Medicare and Medicaid, understand requirements of those programs and are transparent and open with those they serve about such requirements. Where documentation is required, peer support providers are able to document collaboratively.
15	Understand the Peer Support Code of Ethics: Peer Support providers understand their responsibilities under the Peer Support Code of Ethics. They know, and can articulate, how the ethics the pertain to peer providers are different from those that apply to other providers within the state mental health system

Relevant Core Competencies (cont'd)

Number	Core Competency
16	Privacy: Peer support providers honor the privacy and confidentiality of individuals, embrace peer support values and follow the law regarding the sharing and disclosure or confidential or protected information.
17	Facilitate Change: Peer support providers facilitate self-directed, autonomous, at-one's-own-pace change within themselves and with others. Peer support providers facilitate institutional, and systems change to move institutions and systems toward trauma-informed, healing-centered care that treats those with trauma histories, substance use and/or mental health challenges as human beings worthy of dignity and respect.

Vermont-Specific Curriculum Topics

Links to resources, services, and supports, including Vermont's mental health system of care

Medicaid/Insurance-Related Requirements, including collaborative documentation

Code of Ethics, including privacy

Change Facilitation

Curriculum Structure

Objectives

- Intended learning outcome
- Knowledge, skills and attitudes prospective peer support providers are expected to acquire upon completion

Content

- Subject matter of topics to be covered, including essential concepts, theories, facts, and information peer support providers need to learn

Scope and Sequence

- Organization and sequencing of the content
- Order in which topics are presented and depth of coverage

Curriculum Structure (cont'd)

Standards and Learning Objectives

- Expected competencies and skills that prospective peer support providers should achieve

Assessment

- Forms of assessments to evaluate learning

Instructional Strategies

- Guidance on teaching methods and strategies to be used by trainers

Curriculum Structure (cont'd)

Resources and Materials

- Recommended list of resources and materials that support learning

Differentiation and Adaptation

- Strategies for differentiation or adaptation to accommodate prospective peer support providers with varying abilities, learning styles or backgrounds

Timeframe and Schedule

- Time estimate to cover each topic
- Suggested schedule or timeline for pacing the instruction

Insurance, Medicaid and Collaborative Documentation

Certified Peer Support Provider Vermont-Specific Curriculum

Objectives:

To develop a general understanding of insurance and Medicaid

To provide participants with essential knowledge and skills for effective collaborative documentation.

To enhance participants' ability to introduce peer support recipients to the collaborative documentation process.

To ensure participants understand the legal and ethical considerations involved in collaborative documentation.

Content:



General Understanding of Insurance and Medicaid Billing

- General description of Medicaid
- Insurance and Medicaid Training by Employer
- General rules for insurance billing
- Examples of reimbursable covered peer support services

Introduction to Collaborative Documentation in Peer Support

- Purpose of documentation
- Requirements for documentation
- Description of collaborative documentation

Content (cont'd):

Best practices and techniques for effective collaborative documentation

- Information to include in documentation of peer support services
- Information to include in narrative summary

Building and maintaining trust and rapport through the collaborative documentation process

- How to talk to peer support recipient about collaborative documentation
- Sample prompts for peer support recipient

Content (cont'd):



Legal and Ethical Considerations in Collaborative Documentation

- Confidentiality vs. Transparency
- Documentation Accuracy vs. peer support recipient Comfort
- Autonomy versus Safety
- Dual relationships
- Collaboration vs. Time Constraints

Scope and Sequence

The module should be offered after Intentional Peer Support, Wellness Recovery Action Planning, Alternatives to Suicide/When Conversations Turn to Suicide, Hearing Voices, and Code of Ethics training.



Standards and Learning Outcomes

Participants will memorialize in writing a progress note using collaborative documentation

Participants will introduce collaborative documentation to peer support recipients, and establish and maintain trust and rapport while engaging in the process of collaborative documentation

Participants will navigate legal and ethical considerations in collaborative documentation

Assessments

Role-plays or simulations where participants engage in collaborative documentation

- Provide participants with the sample progress note and ask them to identify the problems and what can be improved
- Provide participants with the sample peer support interaction and ask participants to write a progress note based on the sample interaction

Group discussion on ethical dilemmas and strategies in collaborative documentation

Differentiation and Adaptation

Allow participants to work in groups to critique a progress note and/or write a progress note based on sample progress note and sample peer support interaction

To help participants understand what information should be included in a note, ask participants to discuss what information they would want on a bill before they would want to pay it; draw connection to template for writing a progress note

To help participants understand benefit of collaborative documentation, ask them about their personal experience with reading their own medical records and how it felt to read inaccurate information and how they would have written the note

To get real-world example of collaborative documentation, ask if any participants have worked with a provider who collaborated with them in writing progress notes; ask participant to share the experience

Instructional Strategies

Lecture and presentation to introduce and explain private insurance and Medicaid

Lecture and presentation to introduce and explain concepts related to collaborative documentation

Role-plays, simulations, and interactive exercises to practice and develop skills in collaborative documentation

Group discussions and reflection activities to explore ethical considerations and dilemmas related to collaborative documentation

Representative Sample Ethical Dilemmas



Peer support recipient shares information about harm to self during a meeting which they later request not to be documented. Does the peer support provider honor the request or document it for accuracy and completeness?

Peer support provider is assigned to support an individual with whom they share a personal connection outside of the peer support role. During a meeting, the individual reports information about an incident that the peer support provider witnessed that is at odds with the peer support provider's recollection. The incident is related to a goal in the peer support recipient's wellness plan. Does the peer support provider document the incident as described by the peer support recipient?

Peer support recipient wishes to document dissatisfaction with the peer support provider in a highly negative manner. Attempts to address the dissatisfaction have not been successful. Does the peer support provider document the dissatisfaction as described by the peer support recipient? Does the peer support provider attempt to rebut the peer support recipient's version of events in the documentation?

Resources and Materials

- Template for Documenting Peer Support Services
- PowerPoint Slide that contrasts clinical documentation with peer support provider documentation
- Medicaid 101 handout
- Examples of peer support provider progress notes written using collaborative documentation
- Centre of Innovation in Peer Support (2018). Peer support worker documentation guidelines. Retrieved June 20, 2023 from <https://supporthouse.ca/wp-content/uploads/2021/05/Peer-Support-Worker-Documentation-Guidelines-Version-1.0-1.pdf>
- Scott, A., & Doughty, C. (2012). "Confronted with paperwork": Information and documentation in peer support. *Journal of Mental Health*, 21 (2), pp. 154-164. <https://www.tandfonline.com/doi/full/10.3109/09638237.2011.638002>

Timeframe and Schedule



Overview
15 minutes



How to document
collaboratively
1.5 hours



Ethical issues
30 minutes



Change Facilitation

Certified Peer Support Provider Vermont-Specific Curriculum

Change Facilitation Curriculum

- Topics to be covered in curriculum
- Learning Outcomes
- Assessments
- Resources and materials

Discussion and Q&A

Certified Peer Support Provider Screening Application

Questions for Discussion

1. Objective and Goals:

- Are the objectives and goals of the curriculum clearly defined?
- Do they align with defined competency skills needed for peer support providers?
- Are goals measurable
- Do the objectives have defined outcomes?

2. Content:

- Is the content accurate, comprehensive, and up-to-date?
- Have ethical dilemmas, role play, and illustrative examples been incorporated?

Questions for Discussion (cont'd)

3. Instructional Design:

- Does the curriculum blend various methods, like lectures, group discussions, real-life case scenarios, simulations, and skills practice?
- Are the necessary resources provided for each section?
- Does the curriculum adhere to adult learning principles?

4. Flexibility and Personalization:

- Does the curriculum allow for adaptations considering the diverse backgrounds, learning styles, and needs of trainees?
- Are there options for individual and group learning?

Questions for Discussion (cont'd)

5. Evaluation and Assessment:

- Does the curriculum define clear methods for evaluation and feedback?
- Does the curriculum offer opportunities for self-assessment and peer assessment?
- Are there templates and grading rubrics included for each exercise?

Additional Resources

Certified Peer Support Provider Vermont-Specific Curriculum

Useful Links



[Peer Specialist Certification: An Analysis of U.S. And Canadian Efforts to Promote and Expand Mental Health Peer Specialist Workforce Capacity](#), **Final, February 24, 2021**

[Vermont Mental Health Peer Support Provider Stakeholder Meeting Series](#), **September – November 2022**

[Letter to House Health Care Committee](#), **February 25, 2023**

[Mental Health Peer Support Certification Stakeholder Meetings: Report and Recommendations](#), **March 2023**

[Vermont Peer Support Provider Core Competencies](#), **March 2023**

[Draft Code of Ethics](#), **revised July 18, 2023**

[Draft Peer Support Provider Training Application](#), **revised July 25, 2023**

State and National Codes of Ethics

<u>AK</u>	<u>AR</u>	<u>CA</u>	<u>CO</u>	<u>CT</u>
<u>DC</u>	<u>GA</u>	<u>HA</u>	<u>IA</u>	<u>ID</u>
<u>IL</u>	<u>IN</u>	<u>KS</u>	<u>KY</u>	<u>LA</u>
<u>MA</u>	<u>MD</u>	<u>ME</u>	<u>MI</u>	<u>MN</u>
<u>MO</u>	<u>MS</u>	<u>MT</u>	<u>NC</u>	<u>ND</u>
<u>NE</u>	<u>NH</u>	<u>NJ</u>	<u>NM</u>	<u>NV</u>
<u>NY</u>	<u>OH</u>	<u>OK</u>	<u>OR</u>	<u>PA</u>
<u>SC</u>	<u>TN</u>	<u>TX</u>	<u>UT</u>	<u>VA</u>
<u>WA</u>	<u>WI</u>	<u>WV</u>	<u>WY</u>	<u>NAADAC</u>
<u>NATIONAL PRACTICE GUIDELINES</u>	<u>SAMHSA NAT'L MODEL STANDARDS</u>	<u>MODEL CODE OF ETHICS</u>		

Questions, Comments, Concerns



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