

Empower Idaho 2023 Peer Support Conference

Welcome!

For questions and assistance, email empoweridaho@jannus.org

**Professional Organization: Collaboration,
Documentation, and Other Tools to Keep
Peer Support Efficient and Ethical**

with Dyany Munson, BA, CPSS





PROFESSIONAL ORGANIZATION:

Collaboration, Documentation, and
Other Tools to Keep Peer Support
Efficient and Ethical

Presented by Dyany Munson, BA, CPSS

CLASS OBJECTIVES

- Learn about the Optum agency and documentation audit tools as a resource to set core standards in the workplace and with peers,
- Resources and tips to streamline documentation and collaboration processes while maintaining confidentiality and meeting state audit requirements, and
- Tips on using supervision, staffing, team meetings, in-house training, forms, and other agency policies and procedures to improve workplace efficiency, efficacy, ethical compliance, and morale.

WHY IS GOOD ORGANIZATION IMPORTANT IN PEER SERVICES?

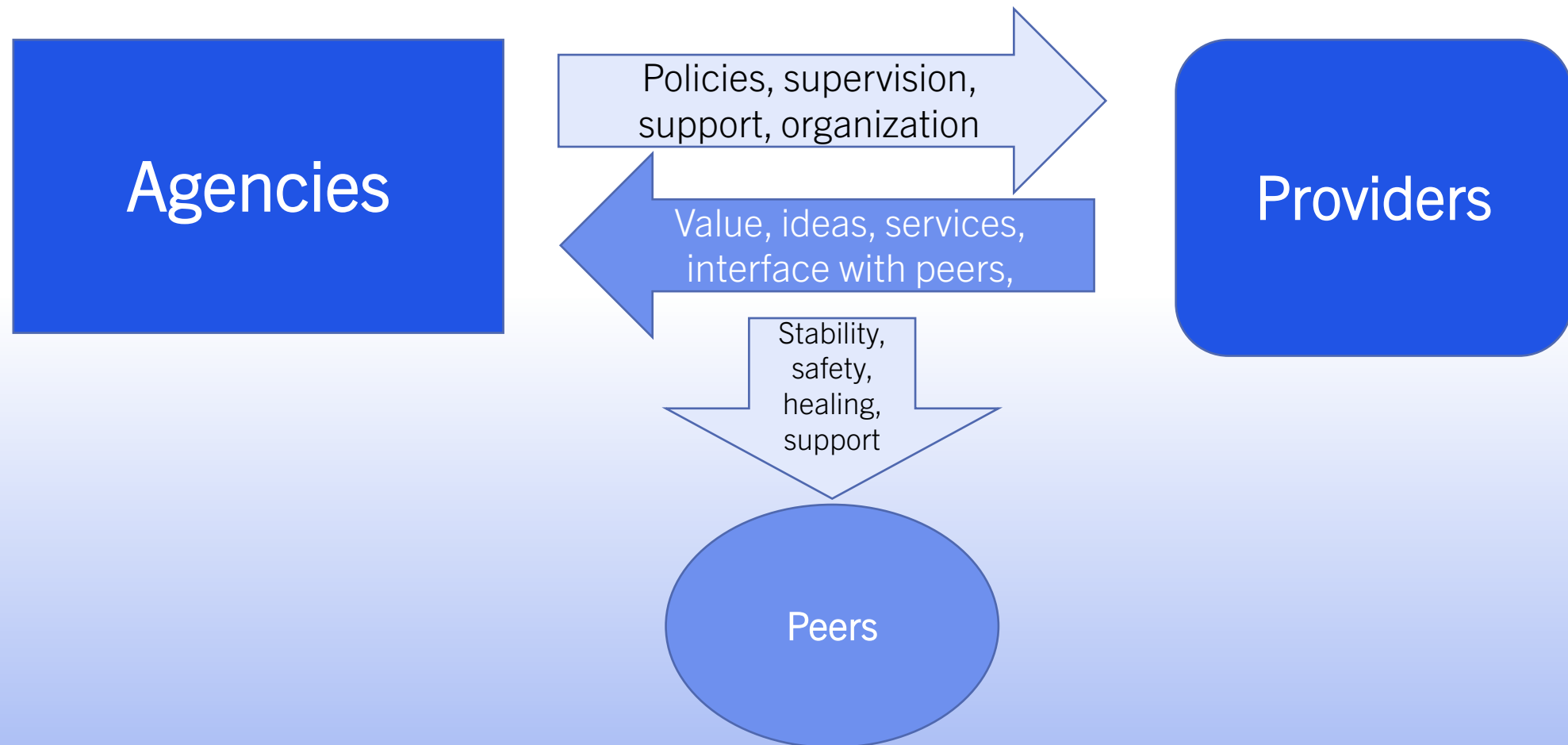
Personal

- Help reduce non-billable time & lost income
- Help support our resilience and recovery
- Help us set and keep good boundaries with our peers and ourselves
- Help us stay in our lane and adhere to our code of ethics
- Help us serve our peers best

Agency

- Help attract and keep good peer providers
- Help reduce overhead costs
- Help agency stay within state and payer guidelines as well as laws and ethics
- Help support clients and peers effectively and efficiently
- Help maximize billable time with minimal provider toll

WHAT STRATEGIES BEST SERVE YOUR PEERS?



PROVIDER CONFIDENTIALITY TOOLS AND TIPS

- Home shredder
- Lockable home and on-the-go document storage
- If your agency doesn't have clear policies on having document copies, storage, and destruction, make and follow your own!
- Make sure no one else has administrator-level access to your work computer
- Passwords for your laptop, your phone, online services (such as office suites and cloud data storage) and EHR system logins must be extremely secure. A password manager can help keep track of the passwords in a more secure way.
- Cell phones must have minimal and unidentifiable peer data that is locked behind passwords.
- Peer and agency-related data needs to be deleted and purged from electronic devices regularly.

OTHER TIPS FOR PROVIDERS

- Keep track of receipts for work-related expenses, from services (like a 2nd phone line or Office suite), devices (laptops, cell phones, etc.), regular expenses (vehicle miles), and peer-related expenses (such as parking or admission to places). Many of these may reduce your taxes, but it would help find a good tax resource to verify and process information accurately!
- Keep your car in good condition. Maintenance can be expensive, but not being able to meet with your peers is worse!
- Keep your car cleaned out and without loose items that may trigger anxiety, be a safety concern, or be subject to being swiped. Having a seat cover for peers may also be appropriate.
- Keep personal copies of all your CEUs and supervision logs. Do not rely on your agency to track those!
- Have business cards if your agency does not provide them.
- Know for yourself what the agency is required to provide, track, and do, and what they cannot ask of you. While most agencies are working hard to be ethical, there are some who have been known to misuse peer providers, not only breaking the code of ethics, but severely damaging the recovery of their peer providers. Know that there are a lot of great agencies out there looking hard for peer providers. They want you and will treat you well. Don't stay at agencies that could harm your recovery.

PROVIDER TECHNICAL TOOLS AND RESOURCES

- Laptop
- Cell phone with 2nd phone line
- Generous roaming data plan
- Office suite software
- Access to a good printer and scanner
- Basic technical know-how—libraries often provide free basic computer and office suite software training. Use it if you need it!

AGENCY-LEVEL TECHNICAL SUPPORTS

- Provide agency emails to your peer providers. This is the most secure and reliable way to communicate with and support your community workers in feeling part of your team.
- Provide whatever technical assistance you can for your agency. Between EHR systems, in-house forms, digital security, and training, good technical support isn't a luxury, it's a necessity that increases efficiency and ethical compliance as well as worker satisfaction. If your agency is too small for full-time IT or an IT service, then find support staff with the skills and time to help cover this need as part of their role.
- Make clear what technical resources are available to your workers, such as printing, computers to use when in-office, software subscriptions, cell phone subsidies, technical support, forms, etc.

AGENCY ORGANIZATION TIPS

- Create great documentation for your EHR systems, forms, processes, and your agency documentation guidelines. Good documentation reduces training and supervision time, and worker time for accurately completing documentation and other necessary tasks. Take the time early to get this done and provide it to your workers!
- Have reasonable but tight deadlines for documentation and other required tasks. This not only helps the entire agency run more efficiently, but can also prompt workers to set necessary internal boundaries to make sure they manage their time and priorities well enough to meet the deadlines.
- Have a process and forms for tracking units per peer/client, due dates for reviews, plans, and CDAs, at a minimum. Tracking miles and CEUs are not required, but useful.
- Having a system of reminders for items that require timely action is extremely valuable to support providers and ensure compliance with requirements.

USEFUL FORMS & DOCUMENTS

- Unit tracking
- Mileage tracking
- Safety Plan
- WRAP or equivalent
- Sample PAD
- Inter-agency professional support team contact list
- Forms for initial supervision and work hours for certification, with signatures (internal AND provider copies)
- Local resources for peers

MEETINGS

Type	Useful for:	Ideal looks like:
Supervision	Addressing self-care of provider, reviewing policies and goals provider may be struggling with, offering support and encouragement, furthering recovery of provider.	Provider feels supported by supervisor and that they have their back. Supervisor has insight and knowledge useful for provider, and offers praise and encouragement for provider.
Staff or team meetings	Sharing resources, building workplace connections, sharing successes and struggles, sharing solutions, more public recognition of progress, reinforcing recovery values.	Regular meetings where providers feel safe, as equal parts of the team, valuable, supported, and are able to both share and gain valuable insight and hope.
Staffing	One-on-one meeting with clinician addressing more specific needs and reviewing progress of all peers/clients on provider's docket.	Regular meetings where provider feels respected and supported. Issues are addressed and ideas, referrals, and supports are offered. Red flags or concerns sometimes found and addressed.
Community team meetings	Sharing of resources and coordination of care between peer, CBRS, CM, and other community-based providers.	Occasional meetings where peer/client privacy is respected, while coordination happens to help providers stay in their lanes and ensure the most consistent and effective services for peers/clients.

AGENCY PROCESS SUPPORTS

- Communicate! Community-based providers don't usually have the office time to build connections with other agency workers, and many updates, news, and policy changes don't always filter down to them effectively. Create a solid policy and path of communication to help workers feel included and informed.
- Have clear and detailed written policies and procedures covering information storage, deadline tracking, regular meetings and communications, reimbursements, expectations on minimum hours, etc.
- Provide recognition, appreciation, and support for your workers, publicly and privately! Through multiple professional studies, it was found that recognition and appreciation were always top indicators of job satisfaction, far above pay. Having a job that can't pay a lot and is inherently challenging, with isolation due to the inherent nature of community-based services, done by workers who are in recovery, requires such recognition even more. Medicaid caps the per-hour pay. But kindness and recognition for good work is free.
- Provide what compensation you can for non-billable time and expenses. If a peer provider is only paid for billable time, then with transportation time, documentation, mandatory supervision and other meetings, they are working about 2 hours for every hour they get paid, not counting the other expenses necessary. As such, the average peer provider pay is less than they would make working fast food in the current market. This is not only unattractive to potential providers and results in high attrition, but it does not support their recovery.
- Boundaries—with peers, personal, and in agency practices—are essential for recovery as well as providing effective peer services. Never ask your peer providers to violate boundaries that help maintain their wellness, including performing tasks for peers outside of their lane.
- Agencies that do not provide a good enough pay and supportive work environment to support their peer providers' recovery are essentially asking peer providers to violate their code of ethics to work there. Don't be that provider.

SELF-CARE AND AGENCY/PROVIDER BOUNDARIES

- Our code of ethics requires that we maintain our own recovery. We are also required to model recovery. Both of these ethical mandates require active, deliberate self-care and boundaries to keep us strong and moving forward on our individual recovery journeys.
- Internal boundaries (boundaries you set for yourself) are essential for these goals. This includes setting and meeting deadlines, staying strictly in your lane, maintaining a good work/life balance, knowing your rights in an agency, not feeling responsible for the choices or circumstances of your peers, and taking care of yourself effectively and deliberately.
- Part of the role of agencies in peer services is to support peer providers through a strong support system, clear communication, setting clear boundaries, supporting provider boundaries, and other tasks. This benefits everyone involved, from the peer, through provider and agency, to the state behavioral system, and even impacting community perceptions of stigma and mental health services. Working together through respectful professionalism and strong organization is a key component of this support.

DOCUMENTATION TIPS

Type	Minimum	Better
Session Notes	Meet Optum audit criteria	Detailed format created using provider input, well-documented, clear, firm, and reasonable deadlines. Format made with input from that team.
Reviews	Meet Optum audit criteria	Same as session notes, plus reminder system prompting providers at least 2 weeks before due.
Recovery Plans	Meet Optum audit criteria	Same as reviews. Created by peer/client with support of peer provider, not therapist. Does not include extra criteria or goals set by agency or other providers.
Collaboration notes	Exist	Supported and trained equally to other notes. Some compensation of time may ensure better compliance.
Discharge/Transfer notes	Meet Optum audit criteria	Supported and trained equally to other notes.
Timesheets	Track billable hours in quarter-hour increments	Also track non-billable time and possibly miles and other expenses.

THE OPTUM PEER SUPPORT AUDIT TOOLS

- Includes agency and documentation requirements for various behavioral health roles under Optum.
- Found at <https://www.optumidaho.com/content/ops-optidaho/idaho/en/providers/guidelines---policies.html>. Go to “Network Provider Audit tools” about half down the page, then expand “Provider Audit Tools.”
- Most peer services—peer, recovery coaching, and youth—are included under the “Peer Support Services” Site and Record audit tools. Family support services have separate audit tools in the same area.
- Even if you work with an organization that does not process peer services through Optum, these audit tools are a good baseline to follow for practice protocols.
- The Idaho Department of Behavioral Health has extra standards for peer services which can provide more guidance.
<https://publicdocuments.dhw.idaho.gov/WebLink/DocView.aspx?id=20881&dbid=0&repo=PUBLIC-DOCUMENTS&searchid=f7a1da0c-e29b-4662-b48c-98beb38abd76>

CONTACT INFORMATION

- Dyany Munson, BA in Psychology and English, CPSS
- Co-facilitator of CPSS Certification training at Case Managers of Idaho.
- Certification training information can be found at <https://peersupportidaho.com/>
- Email at peersupport@dyany.com

CITATIONS

- Optum Network Provider Audit Tools, accessible at <https://www.optumidaho.com/content/ops-optidaho/idaho/en/providers/guidelines---policies.html>
- HIPAA Privacy and Security Rules, accessible at <https://www.hhs.gov/hipaa/for-professionals/index.html>
- The Top 10 Factors that Affect Job Satisfaction, Per Se. (2022)
<https://www.persegroup.com/blog/2022/08/the-top-10-factors-that-affect-job-satisfaction?>