

Initiation

Question

- 01 Each consumer has a separate record.
- 02 Each record includes the consumer's address, home and work telephone numbers, birth and/or identified gender, employer or school, home and work telephone numbers including emergency contacts, relationship or legal status, and guardianship information if relevant.
- 03 All entries in the contact record include the responsible peer/family/recovery coach's name, what organization the peer works for and is dated and signed (including electronic signature for EMR systems) where appropriate.
- 04 The peer/family/recovery coach has the name and contact information for the consumer's psychiatrist, therapists, treatment counselor, and/or case worker in the record.
- 05 The reasons for starting the peer services are indicated.
- 06 The goals the consumer has for working with the peer/family/recovery coach are stated in the record
- 07 There is evidence in the consumer's record of an inventory of the consumer's strengths and other resilience factors such as the consumer's support network.
- 08 There is evidence in the consumer's record that the peer specialist conducted an inquiry as to whether the consumer has a WRAP, an advanced directive, recovery plan, and a plan for managing relapse.
- 09 Comments on the consumer's perception on their current family and/or social supports is included in the record.
- 10 There is evidence in the contact record that the consumer confirms that consumer wants services.
- 11 There is evidence the peer specialist obtained appropriate consents to contact consumer's behavioral health clinician, medical physician, family/social supports, and/or agencies and other programs with which the consumer is involved.

Coordination of Care

Question

- 12 There is evidence in the contact record of the consumer's behavioral health clinician (e.g. psychiatrist, social worker, psychologist, counselor, treatment counselor), including contact information
- 13 There is evidence in the contact record that the Peer Specialist is coordinating care with the behavioral health clinician.
- 14 There is evidence in the contact record that the consumer was asked whether they have a medical physician (PCP).
- 15 If the consumer has a PCP there is documentation that communication/collaboration occurred.

Recovery Planning

Question

- 16 There is evidence in the contact record of a recovery plan, developed by the consumer with support from the specialist as needed.
- 17 The recovery plan includes a description of the consumer's goals, the timeframes for meeting each goal, and the steps the consumer wants to take to achieve his/her goals.
- 18 The recovery plan includes a description of how the consumer will engage in peer support, empowerment activities and other community support services.
- 19 The recovery plan includes the development of a WRAP (if desired by the consumer) , advance directive (if desired by the consumer), and/or plan for managing relapse.
- 20 There is evidence that the peer/family/recovery coach has offered the consumer a range of empowerment tools.
- 21 The contact record shows the peer specialist is helping the consumer work with their providers.
- 22 There is evidence the recovery plan is reviewed at regular intervals.

Case Notes

Question

- 23 Each case note includes the date of service, start and stop time, and is signed by the Peer Specialist.
- 24 Each case note identifies what recovery plan goals are being addressed during the session.
- 25 The case notes reflect changes in goals as new issues are identified by the consumer.
- 26 The case notes describe/list consumer strengths and challenges and how those impact the consumer meeting or changing the recovery plan goals.
- 27 There is evidence that the peer /family/recovery coach has offered the consumer access to face to face, online or phone based support.
- 28 The peer/family/recovery coach describes in the case notes the progress or lack of progress towards recovery plan goals.
- 29 The case notes document any referrals made to other agencies, and/or support services when indicated.

Transitions Planning

Question

- 30 If the consumer transitioned from the service, there was evidence the peer specialist coordinated the transition with the consumer's primary behavioral health clinician, and other appropriate agencies and/or supports.
- 31 If the consumer was transitioned from the service, there was evidence that the peer specialist provided the consumer with a list of appropriate peer support groups and activities.

Administrative

Question

- 32 The case notes document the date of next agreed upon appointments.
- 33 The record is clearly legible to someone other than the writer.