

Training Curriculum Competencies

Peer Services in Crisis Care Specialization for Certified Medi-Cal Peer Support Specialists

Introduction

Peer Support is a proven tool for enhancing the recoveries of people with mental illness and/or substance use challenges. Senate Bill 803 (SB 803) Beall recognizes the benefit that peer support provides to individuals and families with mental health and substance use difficulties and the increased diversity and effectiveness peers bring to the mental health workforce. In alignment with SB 803, the Department of Health Care Services (DHCS) established statewide requirements for the development of a program to certify Peer Support Specialists, creating a new Medi-Cal provider type and service categories that will be reimbursable through Medi-Cal. The California Mental Health Services Authority (CalMHSA) is implementing the Medi-Cal Peer Support Specialist Certification program on behalf of interested county mental health and behavioral health plans. Specifically, this report focuses on additional training and skills for certified Medi-Cal Peer Support Specialists who provide peer support to individuals needing crisis care.

As part of this implementation plan CalMHSA has undergone a thorough landscape analysis of existing Peer Certification programs across the United States to compare core curriculums, training standards, required skills, and best practices. This landscape analysis will focus on the core skills and practices of peer support for persons who are in crisis. This is a priority specialization area which was identified by community members and stakeholders in California.

Background

[Mental Health Services: Peer Support Specialist Certification Program Act of 2020](#) Senate Bill 803 (SB 803), authored by California State Senator Jim Beall is the “Mental Health Services: Peer Support Specialist Certification Program Act of 2020.” It sets a standard of seventeen Core Competencies that every Peer Support Specialist is required to know to be certified as a practitioner. In California, this creates a new provider and service type eligible for Medi-Cal reimbursement through the county mental health and behavioral health plans. The Department of Health Care Services will create guidance of reimbursement requirements.

To be a certified Medi-Cal Peer Support Specialist an individual must meet the following qualifications:

- Be at least 18 years of age.
- Possess a high school diploma or equivalent degree.
- Be self-identified as having experience with the process of recovery from mental illness or substance use disorder, either as a consumer of these services or as the parent, caregiver or family member of a consumer.
- Be willing to share their experience.
- Have a strong dedication to recovery.
- Agree, in writing, to adhere to a code of ethics.
- Successfully complete the curriculum and training requirements for a peer support specialist.
- Pass a certification examination approved by DHCS for a peer support specialist.

Core Competencies for Medi-Cal Peer Support Specialists

The training curriculum for Peer Support specialists must incorporate the following core competencies: 1) The concepts of hope, recovery, and wellness; 2) The role of advocacy; 3) The role of consumers and family members; 4) Psychiatric rehabilitation skills and service delivery, and addiction recovery principles, including defined practices; 5) Cultural and structural competence trainings; 6) Trauma-informed care; 7) Group facilitation skills; 8) Self-awareness and self-care; 9) Co-occurring disorders of mental health and substance use; 10) Conflict resolution; 11) Professional boundaries and ethics; 12) Preparation for employment opportunities, including study and test-taking skills, application and résumé preparation, interviewing, and other potential requirements for employment; 13) Safety and crisis planning; 14) Navigation of, and referral to, other services; 15) Documentation skills and standards; 16) Confidentiality; and 17) Digital literacy.

In California, a single certification exists for the Medi-Cal Peer Support Specialists who meet the certification requirements noted above. Additionally, a certified Medi-Cal Peer Support Specialist may elect to receive training in any of the 4 areas of specialization: 1) Parent, Caregiver, Family Member Peer; 2) Working with persons who are in crisis care; 3) Working with persons who are involved in the criminal justice system; and 4) Working with persons who are unhoused. The areas of specialization offer a certificate of completion and no state certification exists for the areas of specialization. For this report, we will provide a high-level overview of the essential components to each core competency for certified Medi-Cal Peer Support Specialists who plan to work with persons who are in Crisis Care. Specifically, we will review the core training curriculum for the certified Medi-Cal Peer Support Specialists and identify any additional training areas of focus for this area of specialization.

Summary

This landscape analysis report draws on the work of Eugene Oregon's White Bird Clinic mobile crisis team CAHOOTS (Crisis Assistance Helping Out on the Streets), "The National Guidelines for Behavioral Health Crisis Care Best Practice Toolkit" from SAMHSA (Substance Abuse Mental Health Services Administration), C4Innovations, Palliance - The Institute for Peer Support & Lived Expertise program of Humannovations, the City of New York, the Cellar Trust, and Mental Health America.

Spectrum of Crisis Service Opportunities

There are several points at which individuals who are experiencing a crisis event can receive the help they need to successfully navigate periods of intensity and ultimately continue to thrive. Starting with before a crisis starts, we can begin to address what are sometimes called "sub-threshold needs" which we refer to in this landscape as "pathways to crisis". The most important of these needs is having access to the supports needed to manage mental health and substance use disorders. Supports like access to medical care, peer support, housing, and income can all be protective factors that prevent a crisis from happening in the first place. The maintenance of wellness may include the use of therapy, medication, and ongoing support for a person to remain well and successful in their lives. There may be times, however, when a person may be impacted by stressors that trigger a crisis. At this stage, there is an opportunity for a person to use their resources to avoid the crisis from happening. During this time, a person is experiencing distress and may experience a subacute experience where stressors can trigger symptoms of mental health or substance use relapse. If not stabilized, the level of crisis can increase, and symptoms become acute and may require higher levels of intervention to help restore a person's ability to thrive. Following a crisis is the period of post-crisis where peer support and safety planning strategies are essential for a person's safety and well-being. The core competencies of the Medi-Cal Peer Support Specialist provide a solid foundation to provide support to individuals through each of these stages. This report focuses on additional key skills that are essential to working with individuals in crisis. These skills are also dependent on whether a peer supporter is working with an adult or youth population.

Core Competencies Identified

For the purposes of this landscape, we will use this idea of a spectrum or continuum of crisis service opportunities with the following categories:

1. Prevention
2. During Crisis
3. Post-Crisis / Recovery

Please note, situations can be fluid and escalate or de-escalate quickly from tension to crisis and back. You will see overlap between the three categories which is deliberate. The

Peer support skills needed for this specialization carry across the artificial boundaries of these categories.

This summary is not meant to be exhaustive but to provide an overview of necessary skills that may be used to support individuals who are in different levels of crisis and to prevent future crises.

Core Competency Categories

Prevention

1. Pathways to Crisis
2. Prevention, De-Escalation, and Crisis Resolution
3. Engagement and Resource Connection / Navigation
4. Person-Centered Trauma-Informed
5. Co-occurring disorders of mental health and substance use

During Crisis

6. Conflict Resolution
7. Person-Centered Trauma-Informed
8. Co-occurring disorders of mental health and substance use
9. Crisis and special populations

Post-Crisis / Recovery / Ongoing Peer Support

10. Crisis planning and support
11. Self-awareness and self-care

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Core Competencies for Specialization – Working with Persons in Crisis Care	
1. <u>Pathways to Crisis</u>	
Skills that can be assigned to this core competency includes:	
<ul style="list-style-type: none">• Abuse (physical, emotional, psychological, sexual, financial, verbal, neglect, spiritual)• Acute and long-term crisis• Assault• Community violence• Drugs or alcohol• Grief• Homelessness	<ul style="list-style-type: none">• Homophobia• Lack of sleep• Loss of relationships• Medical crisis• Mental health crisis• Natural disaster• PTSD• Public health crisis• Racism• Suicidal thoughts• Unemployment
2. <u>Prevention and De-Escalation</u>	
Skills that can be assigned to this core competency includes:	
<ul style="list-style-type: none">• Meet people where they are.• Identify indicators that an individual may be re-experiencing symptoms of his or her condition(s) and provide early intervention strategies to avert crisis and/or the need for intensive services.• Assist individuals to develop and activate self-management plans, advanced directives, relapse prevention strategies, and crisis prevention strategies.• Understand and utilize de-escalation techniques.• Understand and be able to utilize suicide prevention concepts and techniques.• Provide reassurance to peers in distress.• Take action to address distress or a crisis using knowledge of local resources, treatment, services and support preferences of individuals served.• Utilize compassionate curiosity in engaging with peers.• Recognize signs of distress and threats to safety among peers and in their environments.• Understand 5150 and 5585 laws and what meets criteria for a hold.• Participate in care coordination with other members of the support team.	

Core Competencies for Specialization – Working with Persons in Crisis Care

3. Engagement and Resource Connection / Navigation

Skills that can be assigned to this core competency includes:

- Build rapport and trust through sharing lived experience that is focused on the person being served.
- Use a trauma informed approach when interacting with individuals.
- Approach every interaction from a strengths-based perspective.
- Support connection to natural supports.
- Help individuals assess their own needs and provide them with referrals to appropriate community resources.
- Maintain up-to-date information about community resources and services to support an individual's recovery.
- Have a basic understanding of mental health and substance use challenges and the behavioral health system to help individuals navigate and choose between options.
- Assist individuals to link to and navigate housing, employment, community sobriety services and supports, relapse prevention, mental health services and supports, education, employment, transportation, and legal resources.
- Model effective coping strategies and interpersonal skills.
- Provide warm hand-offs to referred agencies and explain the necessity for the referrals so individuals understand and follow through.
- Develop tools for effective outreach and continued support.
- Consider multiple barriers and challenges when helping an individual.
- Assist individuals in identifying support systems consistent with individual needs.
- Support engagement in mental health and substance use treatment services in the community.
- Use a strengths-based approach to encourage use of skills, strategies, and strengths that are already working or may work for an individual.
- Understand and be able to advocate for an individual's rights, especially Patient's Rights.

Core Competencies for Specialization – Working with Persons in Crisis Care

4. Person-Centered Trauma-Informed

Skills that can be assigned to this core competency includes:

- Meet people where they are, understand that they may not be ready to accept services or talk to you about their trauma.
- Support individual choice with decision-making and services received.
- Recognize signs of distress to support individuals in avoiding crisis.
- Be aware of PTSD, immediate and long-term effects of trauma and how it affects individuals.
- Understand and utilize the core principles of trauma-informed practices and their application in peer services before, during, and after a crisis.
- Understand ACE's, the prevalence of trauma, and its impact on physical, behavioral, and emotional wellness to support individuals.
- Respond to personal risk indicators to assure welfare and safety of individuals.
- Report suspicions of abuse or neglect to appropriate authorities.
- Be non-judgmental about individual responses to crisis and trauma.
- Know strategies to build resilience and perseverance.

5. Co-occurring disorders of mental health and substance use

Skills that can be assigned to this core competency includes:

- Promote hope, the potential for change, and personal empowerment.
- Create healing relationships based on respect, compassion, open and honest communication, active listening, and cultural humility.
- Foster individual choice and self-determination.
- Approach every interaction from a strengths-based perspective.
- Be non-judgmental.
- Use active listening and empathic listening skills.
- Recognize and use person-centered language.
- Be able to help individuals navigate the substance use system, public and private, so they can receive the services they want.
- Have a basic understanding of the Disease Model of Addiction and the difference between prevention, treatment, and recovery to support individuals in their recoveries.
- Have a basic knowledge of treatment approaches such as Medication Assisted Treatment (MAT) and Medication Assisted Recovery (MAR) to support individuals in their recoveries.

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- Understand the prevalence of trauma in the lived experience of people with co-occurring disorders to support individuals in their recoveries.
- Meet people where they are.
- Understand Harm Reduction to support individuals in their recoveries.
- Be able to communicate lived experience in a way that is supportive.
- Support Peers in whatever their goal is.
- Understand the Stages of Change, Recovery Capital, and Recovery Action Planning to support individuals in their recoveries.
- Embrace all pathways to recovery.
- Use an individual's dissatisfaction as an avenue to set recovery goals.
- Use questions to help an individual identify and move through their fears and get in touch with the life they want.
- Help individuals identify beliefs and values they hold that work against their recoveries.
- Provide culturally relevant education to individuals, community members, or groups on the role that cultural identity, ethnic background, age, and gender can have in creating resiliency and improving prevention, treatment, and recovery from substance use challenges.
- Provide education regarding warning signs, symptoms, and progression of substance use disorders.
- Provide peer support services even if individuals are not engaged in treatment.
- Respect the individual's confidentiality.

II. During a Crisis

Core Competencies for Specialization – Working with Persons in Crisis Care

6. De-Escalation and Crisis Resolution

Skills that can be assigned to this core competency includes:

- Be able to do a safety and risk assessment.
- Immediately report suspicions of suspected abuse or neglect.
- Provide support both one-on-one and as part of a team.
- Meet people where they are.
- Recognize signs of distress and threats to safety among peers and in their environments.
- Understand and utilize de-escalation techniques.
- Understand and be able to utilize suicide prevention concepts and techniques.
- Provide reassurance to peers in distress.
- Take action to address distress or a crisis using knowledge of local resources, treatment, services and support preferences of individuals served.
- Identify indicators that an individual may be re-experiencing symptoms of his or her condition(s) and provide early intervention strategies to avert crisis and/or the need for intensive services.
- Assist individuals to develop and activate self-management plans, advanced directives, relapse prevention strategies, and crisis prevention strategies.
- Utilize compassionate curiosity.
- Practice non-judgmental behavior.
- Utilize effective communication, conflict resolution and problem-solving skills.
- Be able to personally deal with conflict and difficult interpersonal relations.
- Know when to escalate situations to a supervisor.
- Understand 5150 and 5585 Laws and what does and does not meet criteria for a hold.
- Recognize signs of human trafficking and abuse and how to connect individuals to appropriate resources.
- Understand and practice risk assessment, suicide prevention, and safety planning.

Core Competencies for Specialization – Working with Persons in Crisis Care

7. Person-Centered Trauma-Informed

Skills that can be assigned to this core competency includes:

- Pair individuals in crisis with culturally appropriate, trauma informed peer supporters who share the culture or gender of the service recipient.
- Meet people where they are, understand that they may not be ready to accept services or talk to you about their trauma.
- Support individual choice with decision-making and services received.
- Recognize signs of distress to support individuals in crisis.
- Assist the individual in crisis in identifying basic needs.
- Understand the relationship between crisis and trauma.
- Have strategies to mitigate trauma during a crisis.
- Be aware of PTSD, immediate and long-term effects of trauma and how it affects individuals.
- Be available for post-crisis support.
- Understand and utilize the core principles of trauma-informed practices and their application in peer services during and after a crisis.
- Understand ACE's, the prevalence of trauma, and its impact on physical, behavioral, and emotional wellness to help individuals in crisis.
- Respond to personal risk indicators to assure welfare and safety of individuals.
- Be non-judgmental about individual responses to crisis and trauma.
- Know strategies to build resilience and perseverance and be able to share them when appropriate.

8. Co-occurring Disorders

Skills that can be assigned to this core competency includes:

- In an overdose emergency immediately call 911.
- Be trained and able to use emergency measures such as the application of Naloxone in case of overdose.
- Meet people where they are.
- Provide peer support services even if individuals are not engaged in treatment.
- Approach every interaction from a strengths-based perspective.
- Be non-judgmental.
- Use active listening and empathic listening skills.
- Recognize and use person-centered language.

- Promote hope, the potential for change, and personal empowerment.
- Create healing relationships based on respect, compassion, open and honest communication, active listening, and cultural humility.
- Be able to help individuals navigate the substance use system, public and private, so they can receive the services they want.
- Have a basic knowledge of treatment approaches such as Medication Assisted Treatment (MAT) and Medication Assisted Recovery (MAR) to support individuals in their recoveries.
- Understand Harm Reduction to support individuals in their recoveries.
- Be able to communicate lived experience in a way that is supportive.
- Use questions to help an individual identify and move through their fears and get in touch with the life they want.
- Help individuals identify beliefs and values they hold that work against their recoveries.
- Plan continuing care, relapse prevention, and discharge planning with individuals and those they wish included (e.g., natural support, providers).

9. Crisis and Special Populations

Skills that can be assigned to this core competency includes:

- Know strategies and be able to work with various subpopulations such as: Youth, Older Adults, Persons Experiencing Homelessness, LGBTQIA+ individuals, people with HIV, cultural and ethnic minorities, those with mental health challenges and addictions, those with physical and developmental disabilities, criminal justice involved individuals, veterans, individuals affected by natural disasters, immigrants and refugees.
- Know and be able to link individuals to resources and services specific to their intersectional identities.
- When possible, utilize alternatives to law enforcement (such as Mobile Crisis teams) for responses to mental health crises.
- Recognize the signs of human trafficking and abuse and how to help.
- Provide culturally appropriate/safe field-based services.
- Understand the legal and possible liability issues while working with Transitional Aged Youth to support individuals in their recovery.
- Be able to work with community partners, including law enforcement.
- Provide peer support when crisis occurs during incarceration and post release from detention.

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10. Post-Crisis Support

Skills that can be assigned to this core competency includes:

- Be available for post-crisis support.
- Know post-crisis interventions.
- Plan continuing care, relapse prevention, and discharge planning with individuals and those they wish included (e.g., natural supports, providers).
- Know how to support individuals facing long/short-term homelessness after crisis.
- Understand the overall life implications of a 5150 / 5585 experience in order to support individuals in their recoveries.
- Know and be able to link individuals to resources and services specific to their intersectional identities.
- Promote hope, the potential for change, and personal empowerment.
- Be non-judgmental about individual responses to crisis and trauma.
- Know strategies to build resilience and perseverance and be able to share them when appropriate.
- Meet people where they are, understand that they may not be ready to accept services or talk to you about their trauma.
- Support individual choice with decision-making and services received.
- Be alert to signs that a new crisis experience is starting.
- Provide support in meeting legal sanctions such as Mental Health Court requirements.

11. Self-Awareness and Self-Care

Skills that can be assigned to this core competency includes:

This competency refers to the importance for peers to be reflective and aware of personal triggers, signs of stress, and ways to care for oneself to maintain personal wellness and offer a positive model for the individuals they serve.

- Understand burnout and use self-awareness to manage compassion fatigue, vicarious trauma, and secondary traumatic stress.
- Develop self-care skills and coping practices for helping professionals.
- Know the importance of ongoing supports for overcoming stress.
- Know resources to promote personal resilience.

Core Competencies for Specialization – Working with Persons in Crisis Care

- Strengthen social skills and healthy social networks including peer and natural support systems.
- Learn to respond appropriately to personal stressors, triggers, and indicators.
- Use tools & techniques for entering “triggering” environments.
- Develop a working knowledge of the concepts of “activation” and “self-management” of whole health goals.
- Practice a strengths-based approach to recovery / wellness.
- Respond to any setbacks on their recovery journey as an opportunity for learning additional techniques or strategies to achieve and maintain their whole health goals.
- Conduct themselves in a manner that fosters recovery and promotes hope for individuals who are on their own recovery journey.

Conclusion

The best way for Peer Support Specialists to help individuals during a crisis is to support individuals prior to a crisis taking place. By assisting with service and resource navigation, providing peer support, coaching, wellness tools, and crisis and advance directive planning, Peer Support Specialists can empower individuals so that crisis situations are limited in severity, require less invasive interventions, and are brief in duration. By providing tools and resources, and helping people identify unmet needs, they can prevent future crises from occurring.

SAMHSA’s essential elements of responding to mental health crisis emphasizes prevention:

Appropriate crisis response works to ensure that crises will not be recurrent by evaluating and considering factors that contributed to the current episode and that will prevent future relapse. Hence, an adequate crisis response requires measures that address the person’s unmet needs, both through individualized planning and by promoting systemic improvements” (SAMHSA, 2009).

In the event of a serious mental health or substance use crisis, peers who approach the situation from a place of compassionate curiosity, shared experience, trauma-informed practices, the ability to de-escalate situations, and skills and knowledge of suicide prevention strategies can make an enormous difference. Peer Support Specialists who are trained in crisis response and given tools for managing secondary trauma are empowered to save lives and maintain their own wellness so that they can continue this important work.