

**Optum Idaho**

**Peer Support Record Tool**

**Facility Name:**

**Reviewer Name:**

**Member Name:**

**Member Age:**

**Diagnosis:**

**Date of Review:**

*Rating Scale: NA = Not Applicable Y = Yes N = No*

Y	N	NA
---	---	----

**Initiation**

<b>1</b>	Each member has a separate record.			
<b>2</b>	Each record includes the member's address, employer or school, home and work telephone numbers including emergency contacts, relationship or legal status, and guardianship information if relevant.			
<b>3</b>	All entries in the contact record include the responsible peer support specialist/recovery coach's name, what organization the peer works for and is dated and signed where appropriate.			
<b>4</b>	There is evidence in the contact record of the member's behavioral health clinician (e.g. psychiatrist, social worker, psychologist, counselor, treatment counselor), including contact information			
<b>5</b>	The reasons for starting the peer support/recovery services are indicated.			
<b>6</b>	The goals the member has for working with the peer support/recovery coach specialist are stated in the record			

<b>7</b>	There is evidence in the member's record of an inventory of the member's strengths and other resilience factors such as the member's support network.		
<b>8</b>	There is evidence in the member's record that the peer support/recovery coach specialist conducted an inquiry as to whether the member has or would like to complete a Personal Wellness Plan and a psychiatric advanced directive.		
<b>9</b>	Comments on the member's perception on their current family and/or social supports is included in the record.		
<b>10</b>	There is evidence in the contact record that the member confirms that member wants services.		
<b>11</b>	There is evidence the peer support specialist/recovery coach obtained appropriate consents to contact member's behavioral health clinician, medical physician, family/social supports, and/or agencies and other programs with which the member is involved.		
<b>Coordination of Care</b>			
<b>12</b>	There is evidence in the contact record that the peer support specialist/recovery coach is coordinating care with the behavioral health clinician.		
<b>13</b>	There is evidence in the contact record that the member was asked whether they have a primary care (medical) physician (PCP).		
<b>14</b>	If the member has a PCP there is documentation that communication/collaboration occurred.		
<b>Recovery Planning</b>			

15	There is evidence in the contact record of a recovery plan, developed by the member with support from the peer support specialist/recovery coach.			
16	The recovery plan includes a description of the member's goals, the timeframes for meeting each goal, and the steps the member wants to take to achieve his/her goals.			
17	The recovery plan includes a description of how the member will engage in peer support, empowerment activities and other community support services.			
18	There is evidence that the peer support specialist/recovery coach has offered the member a range of empowerment tools.			
19	The contact record shows the peer support specialist/recovery coach is helping the member work with their providers.			
20	There is evidence the recovery plan is reviewed at a minimum of every 90 days.			
<b>Case Notes</b>				
21	Each case note includes the date of service, start and stop time, and is signed by the peer support specialist.			
22	Each case note identifies what recovery plan goals are being addressed during the session.			
23	The case notes reflect changes in goals as new issues are identified by the member.			

24	The case notes describe/list member strengths and challenges and how those impact the member meeting or changing the recovery plan goals.			
25	The peer support specialist describes in the case notes the progress or lack of progress towards recovery plan goals.			
26	The case notes document any referrals made to other agencies and/or support services when indicated.			
<b>Transition Planning</b>				
27	If the member transitioned from the service, there was evidence the peer support specialist/recovery coach coordinated the transition with the member's primary behavioral health clinician and other appropriate agencies and/or supports.			
28	If the member was transitioned from the service there was evidence that the peer support specialist/recovery coach provided the member with a list of appropriate peer support groups and activities.			
<b>Records</b>				
29	The case notes document the date of next agreed upon appointments.			
30	The record is clearly legible to someone other than the writer.			