




Behavioral Health Services (BHS)

Peer Support Services Practice Guideline

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Approval	Signature	Date
Ian Kemmer, LCSW Director Behavioral Health Services		04/09/2026



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Introduction

Purpose

Peer support services are an essential component of the public behavioral health services, as they offer recovery-oriented, resilience-focused, person-centered, and trauma-informed assistance to individuals living with mental health condition and/or substance use disorder. The U.S. Department of Health and Human Services’ Substance Abuse and Mental Health Services Administration (SAMHSA) states that peer support services are provided by “a person who uses his or her lived experience of recovery from mental illness and/or addiction, plus skills learned in formal training.”¹ Those who provide peer support services are trained and certified to draw from lived experience of recovery and experiential knowledge to help others who are facing similar situations.

The purpose of this document is to provide guidelines that can assist in the development, implementation, and evaluation of peer support services in Behavioral Health Services. These guidelines play a crucial role in helping guide the delivery and promote best practices in peer support services.

Intended Audience

The intended audience of this document includes those who provide peer support services, supervisors of those who provide peer support services, program managers, and administrators who are interested in promoting and enhancing peer support services under Behavioral Health Services.

Definition of Terms

Core competencies are a set of knowledge, skills, and attitudes a person needs to successfully perform a role or job. Knowledge is information and understanding learned through experience and training. Skill is the result of applying knowledge or ability to a set of circumstances, and attitude is the way a behavior is performed. Attitudes often align with principles or values of a practice.

Family member is a person, who provides primary support for, is a primary caregiver of, or whose daily life is impacted by being a family member of a person who is living with serious mental health and/or substance use disorders. Family members may be the biological parents, foster parents, siblings, spouses, domestic partners, children, or anyone whom the consumer/client defines as “their family members.”

Peer support specialist is an individual with lived experience with the process of recovery from mental health conditions, substance use disorders, or both, either as a consumer of these services or as the parent or family member of the consumer, who is trained to offers peer support services to others. Can also be referred to as peer mentors, peer navigators, parent partners, peer advocates, or peer recovery coaches.

Recovery from behavioral health conditions is a process of change through which individuals improve their health and wellness, live a self-directed life, and strive to achieve their full potential.³



Background

Development of Guideline

This Practice Guideline was developed by the Behavioral Health Services (BHS) Practice Guidelines Workgroup, which is a committee of clinicians, peers, supervisors, psychiatrists, and BHS managers who represent all BHS areas. The Practice Guidelines Workgroup was developed to create and standardize practice guidelines within BHS.

Selection of Evidence

This Practice Guideline was developed based on a review of the literature and established guidelines from State and Federal authorities, with a special emphasis on guidelines developed under the authority of California Department of Health Care Services (DHCS) for implementation of the Medi-Cal Peer Support Specialist Certification Program.

Documentation of Need

With the emergence and growth of peer support services in behavioral health systems and an ever-increasing demand for these services, there is a growing need to increase understanding around:

- Clarity and consistency in the definition, roles, and tasks of peer support specialists across different settings and populations
- Adequate and appropriate supervision and support for peer support specialists
- Recognition and integration of peer support specialists in behavioral health workforce and system
- Quality assurance and improvement mechanisms for peer support services and outcomes

If these steps are not taken, important opportunities to strengthen the delivery and impact of peer support services, as well as the professional development of peer support specialists, may be missed. Therefore, there is a need for guidelines that can provide direction, guidance, and standards for advancement and implementation of peer support services.

Justification

Guidelines can support adherence to any State and Federal standards, provide recommendations for best practices, and assist the system in making informed decisions that can improve the quality, consistency, and efficacy of behavioral health care delivery, as well as reduce misunderstanding, variation, and uncertainty in implementation and practice.



Consistency with Policies, Regulations, Laws, and Professional Standards

The primary purpose of this Practice Guideline is to educate professional staff and to identify well-supported practices to help guide the provision of high-quality services. The Guideline is designed to educate about desirable professional practices and to recommend specific professional behavior.

This Guideline is intended to be aspirational, with the intent to facilitate continued development of professional practices and to promote high quality services. This set of guidelines may not apply to every professional or clinical situation within the scope of the guideline. As a result, the guideline is not intended to take precedence over professional judgment.

These guidelines are meant to provide consistency with other HCA policies, the Office of Compliance, and any state or federal regulations to which HCA is already adhering. Federal and State laws supersede these Guidelines, and for reference about the laws related to peer support services in the State of California, please refer to:

California Senate Bill 803 – Peer Support Specialist Certification Program Act of 2020

Welfare and Institutions Code (WIC) – Chapter 7 of Part 3 of Division 9 of WIC, relating to Medi-Cal

Medi-Cal Code of Ethics for Peer Support Specialists in California – DHCS

Guideline

Guideline Statement

This guideline highlights existing standards and best practices from the State (California Health & Human Services Agency – DHCS) and Federal authorities (U.S. Department of Health and Human Services – SAMHSA). With the establishment of Medi-Cal Certified Peer Support Specialist program, BHS seeks to adopt the standards of the program developed under the authority of DHCS for its peer support specialist workforce.

Application

What is Peer Support?

Peer support in behavioral health includes a range of activities and interactions between people who share similar experiences related to the recovery process with mental health conditions, substance use disorders, or both. It can include advocacy, linkage to resources, sharing of experience, community and relationship building, group facilitation, skill building, mentoring, goal setting, and more.⁴ Peer support is provided through “shared understanding, respect, and mutual empowerment”⁵ and is aimed at helping



people become and stay engaged in the recovery process and reduce the likelihood of relapse. Peer support services help “extend the reach of treatment beyond the clinical setting into the everyday environment of those seeking a successful, sustained recovery process.”⁵ Additionally, SAMHSA states that peer support roles may extend to the following: providing training, supervising other peer workers, developing resources, administering programs or agencies, and educating the public and policymakers.⁵

Who Provides Peer Support Services?

As stated earlier, peer support services are provided by “a person who uses his or her lived experience of recovery from mental illness and/or addiction, plus skills learned in formal training.”¹ The key difference between peer support providers and other behavioral health providers is the ability to draw from lived experience and experiential knowledge.

With the establishment of Medi-Cal Peer Support Specialist Certification Program as a result of the California Senate Bill 803 being enacted into law in 2021, the additional clarifications regarding qualifications were made by the State:²

- Individual who has self-identified as having lived experience with the process of recovery from mental illness, substance use disorder, or both, either as a consumer of these services or as the parent or family member of the consumer
- Be willing to share their experience
- Have a strong dedication to recovery
- Agree, in writing, to adhere to the Code of Ethics
- Successfully complete the 80-hour training requirements for a peer support specialist through an approved training entity

Medi-Cal Peer Support Specialist Certification Program Standards

In addition to establishing qualifications, the State was also required to define and/or establish range of responsibilities, practice guidelines, training curriculum with core competencies, and code of ethics. The workgroup recommends aligning with these standards, guidelines and requirements established by the State.

Peer Support Core Competencies

Below are each of the 17 peer support core competencies originally established by Senate Bill 803 along with some of the key skills, attitudes, and approaches to demonstrate competence in the field as described by the State.⁶ All peer support specialists working in BHS are required to complete BHS sponsored, State-approved 80-hour competency-based training.

The concepts of hope, recovery, and wellness

- Ability to promote hope, the potential for change, and personal empowerment
- Ability to create healing relationships based on respect, compassion, open and honest communication, active listening, and cultural humility



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- Address internal and external stigma
- Be able to identify the beliefs and values an individual holds that support and enrich recovery
- Be trauma informed
- Demonstrate consistent support during times of wellness, as well as during challenging times
- Model acceptance and cultural humility
- Effectively and appropriately share relevant parts of your own recovery story to convey and inspire hope that recovery is possible
- Model wellness for individuals in recovery by maintaining one's own personal wellness
- Help individuals learn how to access and navigate formal and informal community resources and services

The role of advocacy

- Teach individuals the skills needed to self-advocate
- Understand the basic structure of the state Mental Health System and how it works
- Know the civil and human rights foundations from which the peer support movement arose, including issues related to prejudice, discrimination, and stigma associated with behavioral health
- Use knowledge of legal resources and advocacy organizations to help an individual build an advocacy plan
- Help peers develop self-advocacy skills and teach advocacy strategies that promote self-determination
- Understand relevant rights and laws (Americans with Disabilities Act, Health Insurance Portability and Accountability Act of 1996, etc.) to ensure that peers' rights are respected
- Teach individuals effective communication skills with staff and doctors regarding treatment in both their medical and behavioral health needs
- Encourage individuals to advocate for their needs and desires in treatment team meetings, community services, living situations, and with family

The role of consumers and family members

- The role of consumer peer support specialists is to support other consumers through shared lived experience
- The role of family peer support specialists is to support other family members through shared lived experience
- The role of consumer and family peer support specialist is to use their experience to role model resiliency and recovery to their peers
- The role of consumers or family members is to recognize when self-care is needed and to practice it
- Use personal stories of lived experience to support and empower the person receiving services
- Connect people to independent social support networks, particularly self-help support groups
- Understand recovery involves individual, family, and community strengths and responsibility
- Advocate within systems to promote person-centered recovery/wellness support services



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- Explain the importance of self-advocacy as a component of recovery/wellness
- Demonstrate a working knowledge of relevant rights and laws to ensure that the individual's rights are maintained
- Participate in efforts to eliminate prejudice and discrimination of people who have behavioral health challenges and their families
- Promotes self-determination and person-centered services when communicating with other members of the individual's care team
- Teach the skills needed to self-advocate

Psychiatric rehabilitation skills and service delivery, and addiction recovery principles, including defined practices

- Understand services are person-centered and are always directed by the person participating in the services, and are personalized to align with the person's specific hopes, goals, and preferences
- Understand services are voluntary and peer support specialists are partners or consultants to those they serve and do not dictate types of services provided or elements of recovery plans
- Understand self-determination, which guides peer support specialists to help individuals achieve their own needs, wants, and goals
- Understand the basic philosophy and principles of psychosocial rehabilitation and substance use recovery strategies
- Be able to help a person articulate, set and accomplish his/her goals
- Understand the role of healthcare professionals that may be members of an individual's care team
- Support individuals in defining spirituality on their own terms
- Keep current with emerging knowledge relevant to recovery, and openly share this knowledge with their colleagues
- Know how to assist other healthcare team members to learn about the process of recovery, the concept of resiliency, and the relationship between person-centered, self-directed care and achievement of whole health goals
- Possess knowledge of addiction and stages of recovery
- Understand and utilize harm reduction model strategies
- Understand lapse/relapse prevention tools and motivational enhancement tools
- Distinguish between sympathy and empathy
- Understand co-occurring disorders, and the benefits of addressing mental health symptoms and addiction at the same time
- Know how to facilitate groups
- Recognize that there are multiple pathways to recovery/wellness
- Relay coping skills, positive attitude skills, and self-esteem building strategies
- Participate as an active member of the individual's treatment team(s)
- Apply effective coaching techniques such as Motivational Interviewing, and apply it to assist individuals in various stages of change



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- Educate on, support, and coach the acquisition and exercise skills needed for symptom management, e.g., stress management, relaxation, communication, assertiveness, refusal skills, and coping skills, and attributes needed to attain and maintain long-term, stable employment and housing
- Educate on how to overcome negative self-talk; noticing patterns and replacing negative statements about oneself, using mindfulness to gain self-confidence and relieve stress

Cultural and structural competence trainings

- Recognize and understand one's own personal values, culture, and spiritual beliefs; how they may contribute to one's own judgement, biases, and beliefs about others; and how to respond if they inhibit one's ability to effectively serve another individual
- Knowledge of influence of cultural heritage on individuals and groups
- Knowledge of and sensitivity to how cultural identity can influence the dynamics in communication
- Knowledge of and sensitivity to how cultural identity shapes the helping process
- Appreciate, recognize, and respect the personal values, cultural, spiritual beliefs, and practices of peers and their families and how these play a role in achieving their whole health goals
- Be able to describe successful multicultural interactions and explain why the topic is important to peer services
- Understand structural racism and how it creates disparities in wealth, employment, education, housing, discrimination, government surveillance, incarceration, drug arrests, immigration arrests, and infant mortality
- Understand how structural racism impacts health and recovery outcomes for people of color
- Recognize the connections between behavioral health conditions and trauma, health disparities, and social inequity
- Be able to interact sensitively and effectively with people of other cultures
- Attend trainings on cultural competence and structural racism, as well as trainings on identifying implicit bias

Trauma-informed care

- Understand the core principles of trauma-informed care
- Understand the prevalence of trauma and its impact on physical, behavioral, and emotional wellness
- Be familiar with the ACEs (Adverse Childhood Events) model
- Understand cultural considerations and the effect of trauma on how one views their cultural experiences and the lens in which one views the world
- Assist the client in identifying basic needs
- Recognize risk indicators that may affect the client's welfare and safety, and respond to personal risk indicators to ensure welfare and safety
- Support the development of healthy behavior that is based on choice
- Report suspicions of abuse or neglect to appropriate authority



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- Teach coping skills of mindfulness, stress reduction, anxiety management, and relaxation techniques

Group facilitation skills

- Understand the difference between treatment goals and recovery goals and be able to create and facilitate a variety of group activities that support and strengthen recovery
- Describe, select, and appropriately use strategies from accepted and culturally appropriate models for group counseling
- Understand how to facilitate peer support/self-help groups and know how to facilitate a recovery dialogue
- Apply instructional strategies and materials that reflect the needs of the target audience
- Facilitate the entry of new members and the transition of existing members
- Facilitate group growth within the established ground rules by using methods consistent with group type
- Describe and summarize individual behavior within group to document individual progress and identify needs and issues that may require further assistance

Self-awareness and self-care

- Practice personal safety and self-care
- Recognize the importance of self-care and develop self-care skills and coping practices for helping professionals
- Know the importance of ongoing supports for overcoming stress in the workplace
- Know resources to promote personal resilience
- Understand burnout and using self-awareness to prevent compassion fatigue, vicarious trauma, and secondary traumatic stress
- Strengthen social skills and healthy social networks including peer and natural support systems
- Be able to discuss their own tools for taking care of themselves
- Learn to respond appropriately to personal stressors, triggers, and indicators
- Anticipate and avert or safely manage any re-experience of symptoms of their own challenge(s) to ensure continued wellness
- Provide access to a range of activation and self-care tools and resources that the individual may find useful in achieving their whole health goals

Co-occurring disorders of mental health and substance use

- Have a basic knowledge of treatment approaches such as Medication Assisted Treatment (MAT) and Medication Assisted Recovery (MAR)
- Understand the prevalence of trauma in the lived experience of people with co-occurring disorders
- Meet people where they are
- Understand harm reduction



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- Understand the stages of change
- Have a basic understanding of the disease model of addiction and the difference between prevention, treatment, and recovery
- Know the science of addiction and the history of addiction
- Embrace all pathways to recovery
- Be active in one's own recovery
- Identify one's own triggers and actively manage one's own recovery
- Demonstrate consistent support to individuals during times of wellness as well as during challenging times
- Demonstrate non-judgmental behavior
- Apply principles of empowerment
- Ask open-ended questions that connect a person to his/her inner wisdom
- Use individual's dissatisfaction as an avenue to setting recovery goals
- Use questions to help individuals identify and move through their fears
- Assist individuals in recognizing the effect of substance abuse on current life challenges and effects of continued use
- 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
- Provide peer support to individuals regardless of whether they take medication
- Provide education on how substance use challenges affect families and society
- Provide education regarding continuum of care and available resources for substance use challenges
- Be able to help individuals navigate the substance use system, public and private so they can receive the services they desire

Conflict resolution

- Develop effective communication skills
- Develop conflict resolution and problem-solving skills
- Understand the dynamics of power, conflict, and integrity in the workplace
- Understand the concept of "seeking out common ground"
- Utilize de-escalation techniques
- Be able to personally deal with conflict and difficult interpersonal relations in the workplace
- Use organizational/departmental chain of command to address or resolve issues
- Communicate to support network personal issues that impact ability to perform job duties



Professional boundaries and ethics

- The role of consumer peer support specialists is to support other consumers through shared lived experience
- The role of family peer support specialists is to support other family members through shared lived experience
- Understand how to establish, negotiate, and maintain appropriate interpersonal limits and boundaries that are necessary to promote effective peer support services
- Understand the peer support specialists' scope of service (i.e., know what one can and cannot do as credentialed peer support specialist)
- Conduct self-evaluations of professional performance applying ethical, legal, and professional standards to enhance self-awareness and performance
- Recognize situations outside the competencies of a peer support specialist
- Maintain high standards of personal conduct and conduct themselves in a manner that fosters their own recovery
- Respect the privacy and confidentiality of those they serve
- Will not enter into dual relationships or commitments that conflict with the interests of those they serve
- Never engage in sexual/intimate activities with those they serve
- Will not use unprescribed or illegal substances under any circumstance
- Will not accept gifts of significant value from those they serve
- Will establish and maintain peer relationships rather than hierarchical relationships
- Demonstrate respect and non-judgmental attitudes toward clients in all contacts with community professionals and agencies
- Maintain confidentiality of client information in written and oral communications in accordance with code of conduct and government statutes
- Never intimidate, threaten, harass, use undue influence, physical force, or verbal abuse, or make unwarranted promises of benefits to those they serve
- Utilize a range of supervisory options to process personal feelings and concerns about clients
- Communicate personal issues that negatively impact their ability to perform job duties and utilize supervision and consultation regarding dual/complex relationships
- Comply with professional code of conduct in accordance with code of conduct and government statutes

Preparation for employment opportunities, including study and test-taking skills, application and resume preparation, interviewing, and other potential requirements for employment

- Know community resources for employment skills development
- Be familiar with how to transition from Social Security and other disability benefits
- Assist, guide, and support in developing education and employment skills
- Know how to use shared experience to leverage social capital and networking



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- Learn employment skills such as study and test-taking skills, application and resume preparation, interviewing, and other potential requirements for employment
- Utilize employment development resources such as job centers, community colleges, and others
- Teach, coach, and model the skills and attributes needed to attain and maintain long-term, stable employment and housing

Safety and crisis planning

- Understand and utilize basic de-escalation techniques
- Recognize various crisis and emergency situations
- Recognize and respond to risk indicators to assure welfare and safety
- Recognize signs of distress and threats to safety among peers and in their environments
- Understand basic suicide prevention concepts and techniques
- Assess individuals for behavior that may result in harm to self or others
- Respond appropriately to risk indicators to assure welfare and physical safety
- Identify indicators that individuals may be re-experiencing symptoms of their condition(s) and provide early intervention strategies to avert crisis and/or the need for intensive services
- Take action to address distress or a crisis using knowledge of local resources, treatment, services and support preference of peers
- Assist individuals to develop and activate self-management plans, advanced directives, relapse prevention strategies, and crisis prevention strategies
- Plan continuing care, relapse prevention, and discharge planning with client/family/significant others
- Use organizational/departmental chain of command to address or resolve issues
- Immediate report suspicions if abuse or neglect are suspected

Navigation of, and referral to, other services

- Develop and maintain up-to-date information about community resources and services
- Have a basic understanding of mental health and substance use challenges and the behavioral health system
- Develop a working knowledge of available healthcare resources to help individuals navigate and choose between options
- Can assist in establishing support systems and interacting with agencies, organizations, and groups
- Collaborate with individuals to identify, link, and coordinate choices with resources
- Develop tools for effective outreach and continued support
- Provide information regarding community resources that support goal achievement, e.g., education, recreation, job training, housing, etc.
- Accompany individuals to community activities and appointments when requested
- Support individuals to use decision-making strategies when choosing services and supports
- Research and identify credible information and options from various resources



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- Make referrals to and placements with other professionals, agencies, community programs, or other resources to meet individuals' needs
- Provide warm hand-offs to referred agencies and explain the necessity for the referrals so individuals understand and follow through
- Exchange relevant information with the agency or professional to whom the referral is being made in a manner consistent with confidentiality rules and regulations and generally accepted professional standards of care
- Evaluate outcomes of services received from referrals to determine need for change of services

Documentation skills and standards

- Understand current documentation requirements for billing Medi-Cal (if Medi-Cal certified)
- Understand the concept of accountability
- Understand and follow mandatory reporting requirements
- Demonstrate a basic knowledge of medical language and chart/record documentation standards to communicate effectively with members of the care team and help individual understand clinical situations and/or terminology
- Document information as required by program policies and procedures for billing and treatment purposes
- Evaluate individual satisfaction with their progress toward recovery and wellness goals
- Document progress in relation to treatment goals and objectives, e.g., identify needs and issues that may require greater assistance
- Document service coordination activities throughout the continuum of care consistent with Federal, California State, agency, and treatment program standards, rules, and regulations
- Communicate rights and responsibilities of service recipients

Confidentiality

- Understand the Health Insurance Portability and Accountability Act (HIPAA)
- Understand Substance Abuse Confidentiality rules (42 CFR Part 2)
- Understand basic Federal, State, employer regulations regarding confidentiality
- Maintain confidentiality in accordance with State and Federal laws
- Inform and explain to individuals the confidentiality rights, program procedures that safeguard them, and the exceptions imposed by regulations
- Exchange relevant information with the agency or professional to whom the referral is being made in a manner consistent with confidentiality rules and regulations and generally accepted professional standards of care

Digital literacy

- Understand digital platforms that can be used for service delivery, benefits acquisition, and resource connections
- Understand digital privacy protections



- Use online and virtual tools to provide access to a range of activation and self-care tools and resources that the individual may find useful in achieving their whole health goals
- Apply appropriate technology to deliver education, training, technical assistance, and other information
- Maintain familiarity with computer applications such as Microsoft Office Suite and Adobe Acrobat to develop recovery-focused resources for peers
- Maintain familiarity with online video conferencing platforms such as Zoom or WebEx to be prepared in the event of needed virtual services
- Share digital privacy protections to individuals to protect health information and confidential conversations
- Create online support groups
- Effectively use technology to engage and provide peer support services to individuals living in rural or remote settings or experiencing other barriers to traditional “face-to-face” interaction

State Adopted Peers Support Services Practice Guidelines

DHCS Behavioral Health Information Notice (BHIN) 21-041 stipulates that Counties must use the practice guidelines developed by SAMHSA, called *What are Peer Recovery Support Services*.⁷ This State-adopted guideline focuses on social support as being central to peer support services and outlines four types of social support. It also outlines four major types of recovery support services activities as core roles and services under peer support services.

Types of Social Support

SAMHSA states that recovery is facilitated by social support, and peer support specialists are uniquely positioned to provide these four key types of peer social support: (1) emotional, (2) informational, (3) instrumental, and (4) affiliational.⁸

Type of Social Support	Description	Peer Support Service Examples
Emotional	Demonstrate empathy, caring, or concern to bolster person’s self-esteem and confidence	<ul style="list-style-type: none"> • Peer mentoring • Peer-led support groups
Informational	Share knowledge and information and/or provide life or vocational skills training	<ul style="list-style-type: none"> • Parenting class • Job readiness training • Wellness seminar
Instrumental	Provide concrete assistance to help others accomplish tasks	<ul style="list-style-type: none"> • Transportation • Help accessing community health and social services



Affiliational	Facilitate contacts with other people to promote learning of social and recreational skills, create community, and acquire a sense of belonging	<ul style="list-style-type: none"> • Recovery centers • Sports league participation • Alcohol- and drug-free socialization opportunities
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In peer support alliance, a peer support specialist in stable recovery provides social support services to a client who is seeking help in establishing and/or maintaining recovery. SAMHSA affirms the reciprocal nature of peer support stating that both parties are helped by these interactions, where the recovery of each is strengthened.⁸

Peer Recovery Support Service Activities

SAMHSA also outlines four major types of peer support service activities: (1) peer mentoring or coaching, (2) recovery resource connecting, (3) facilitating and leading recovery groups, and (4) building community.⁸

- **Peer mentoring or coaching** refers to one-on-one relationship where the peer support specialist encourages, motivates, and supports a peer who is seeking to establish or strengthen his/her recovery. Examples include setting recovery goals, developing recovery action plans, and problem-solving directly related to recovery such as finding sober housing or dealing with issues related to having a criminal justice record. The relationship between the peer support specialist and peer is highly supportive, rather than directive. Instead of urging peers to adopt a specific program of recovery, the peer support specialist helps peers make choices about which recovery pathway would be best to explore. Self-disclosure and sharing one’s personal story by means of enhancing value of the service is an important dimension to this activity. Peer support specialists implicitly take on the role of modeling recovery.
- **Peer recovery resource connecting** refers activities related to connecting peers to recovery resources, like case management. The purpose is to connect the peer with professional and non-professional services and resources available in the community. The peer support specialist often has had personal experience navigating the service systems and accessing the resources. When navigating formal treatment systems, peer support specialists can advocate and support for admittance, as well as facilitating discharge planning, even in collaboration with the treatment staff. Peer support specialist also encourages, facilitates, and supports peers’ participation in mutual aid support groups and educational opportunities.
- **Facilitating and leading recovery groups** includes activities structured as support groups and educational groups, often both. Support groups usually involve the sharing of personal stories and some degree of collective problem-solving. Groups are often formed around shared identity such as belonging to a common cultural or religious group or shared experience such as living with specific disorders, needing to re-enter the community following incarceration, or facing challenges in parenting. Educational groups, on the other hand, tend to focus on a specific subject or skill set



and can include job skills training, budgeting and finances, relapse prevention, and conflict resolution.

- **Building community** refers to activities where peer support specialists can help peers make new friends and build alternative social networks that support recovery. Peer support specialists can also help organize or find recovery-oriented social activities such as family-centered holiday celebrations and drug- and alcohol-free get-togethers. Participation in these activities provide a sense of acceptance and belonging, as well as the opportunity to practice social skills.

Scope of Practice for Medi-Cal Peer Support Services

DHCS BHIN 22-026 provides guidance on the scope of practice for peer support services for Medi-Cal beneficiaries that have an approved plan of care with individualized goals.⁹ These services can be provided standalone or in conjunction with other services, including inpatient and residential services. They can also be provided to family members or other collaterals that are supporting the beneficiary, if the purpose of their participation is to focus on the treatment needs by supporting achievement of beneficiary’s goals. The following three service components represent the scope of practice for peer support services:

- **Educational skill building groups** – services that help provide a supportive environment in which beneficiaries and their families learn coping mechanisms and problem-solving skills that lead to achieving desired outcomes. These groups promote skill-building in the areas of socialization, recovery, self-sufficiency, self-advocacy, development of natural supports, and maintenance of skills learned in other support services.
- **Engagement** – includes peer support specialist led activities and coaching to encourage and support beneficiaries to participate in behavioral health treatment. It may also include supporting beneficiaries in their transitions between levels of care and supporting them in developing their own recovery goals and processes.
- **Therapeutic activity** – structured non-clinical activity provided by a peer support specialist to promote recovery, wellness, self-advocacy, relationship enhancement, development of natural supports, self-awareness and values, and the maintenance of community living skills to support the beneficiary’s treatment to attain and maintain recovery within their communities. Examples include advocacy on behalf of the beneficiary; promotion of self-advocacy; resource navigation; and collaboration with the beneficiary and those providing care or support to the beneficiary, family members, or significant support persons.

Medi-Cal Code of Ethics for Peer Support Specialists

In addition to the scope of practice set by DHCS, Code of Ethics were also developed and adopted to guide Medi-Cal Certified Peer Support Specialists in their roles and responsibilities and levels of responsibility in which they function professionally.¹⁰ The values and ethics from the Code of Ethics is to promote a consistent message to those who are providing, receiving, and supervising services from a peer support specialist.



The table below outlines the values that serve as foundation for peer support services, along with the ethical standards that detail how the values are to be ethically interpreted in practice. All Medi-Cal Certified Peer Support Specialists must agree to not violate, or assist in or abet the violation of, or conspire to violate the following Code of Ethics.¹⁰ Regardless of certification status, BHS aspires to align and uphold these values and ethics as the standards for those in peer support specialist roles.

Values	Ethical Standards
Hope	Peer Support Specialists: <ul style="list-style-type: none"> • Inspire hope in those engaging in services by living a life of Recovery and/or Resiliency
Person-Driven	Peer Support Specialists: <ul style="list-style-type: none"> • Support individuals receiving services and their support network within the context of their worldview, to achieve their goals based upon their needs and wants • Focus on self-determination, as defined by the person engaging in services, and support the person’s participation in their own recovery. • Inform others about options, provide information about choices, and then respect peers’ decisions • Encourage people to look at the options, take risks, learn from mistakes, and grow from dependence on the system toward healthy interdependence with others • Assist those they support to access additional resources • Disclose lived experiences of recovery in a way that maintains the focus on and is beneficial to the person engaging in services • Recognize there are many pathways to recovery that can be very different than their own journey
Family Driven and Child-Centered	Peer Support Specialists: <ul style="list-style-type: none"> • Promote the family member’s ethical decision-making and personal responsibility consistent with that family member’s culture, values, and beliefs • Respect and value the beliefs, opinions, and preferences of children, youth, family members, parents, and caregivers in service planning • Promote the family members’ voices and the articulation of their values in planning and evaluating behavioral health related challenges or concerns • Support other family members as peers with a common background and history • Disclose personal lived experiences of building resiliency in a way that focuses on and is beneficial to the child, youth, family member, parent, or caregiver engaging in services • Build supports on the strengths of the child, youth, family, or caregiver



	<ul style="list-style-type: none">• Build partnerships with others who are involved in the care of our children, youth, or adult family members• Communicate clearly and honestly with children, youth, family members, and caregivers
Holistic Wellness	<p>Peer Support Specialists:</p> <ul style="list-style-type: none">• Promote the family member’s ethical decision-making and personal responsibility consistent with that family member’s culture, values, and beliefs• Practice in a holistic manner that considers and addresses the whole health of those engaging in services• Recognize the impact of co-occurring challenges (substance use, developmental and physical challenges) in the recovery resiliency journey and provide supports sensitive to those needs• Recognize the impact of trauma on the recovery/resiliency journey and provide the support specific to those challenges• Honor the right of persons engaging in services to choose alternative treatments and practices, including culturally specific traditional methods, healing arts, including acupuncture and meditation, spiritual practices or secular beliefs, and harm reduction practices
Authenticity	<p>Peer Support Specialists:</p> <ul style="list-style-type: none">• Practice honest and direct communication in a culturally relevant manner, saying what is on their mind in a respectful way; Difficult circumstances are addressed with those who are directly involved; Direct communication moves beyond the fear of conflict or hurting other people to the ability to work together to resolve challenges with caring and compassion• Share own lived experience to provide hope and inspiration for recovery• Practice healthy disclosure about their own experience focused on providing hope and direction toward recovery and/or resiliency• Work within their scope of practice as defined by this Code of Ethics and their employing agency• Remain aware of their skills and limitations, and do not provide services or represent themselves as an expert in areas for which they do not have sufficient knowledge or expertise• Know that maintaining the authenticity and integrity of their role is critical to the effectiveness of peer support services• Seek supervision, peer support services, and/or other contact with peer colleagues or other supports to stay within their scope of practice



Cultural Responsiveness & Humility	<p>Peer Support Specialists:</p> <ul style="list-style-type: none">• Acknowledge the importance of language and culture, intersecting identities, knowledge, and acceptance of dynamics of cultural differences, expansion of cultural knowledge, curiosity, and adaptation of services to meet culturally unique needs• Strive to provide culturally responsive and relevant services to those they support• Respect cultural identities and preferences of those engaging in services and their families and respect the right of others to hold opinions, beliefs, and values different from their own• Shall not discriminate against others on the basis of gender, race, ethnicity, sexual orientation or gender identity, age, religion, national origin, marital status, political belief, or mental or physical differences• Shall not discriminate against others on the basis of any other preference, personal characteristic, condition, state, or cultural factor protected under Federal, State or local law• Seek further information, education, and training in cultural competence as necessary to assist those they support
Respect	<p>Peer Support Specialists:</p> <ul style="list-style-type: none">• Provide a welcoming environment for persons engaging in services• Approach each person, youth, parent or family member with openness, genuine interest, and appreciation• Accept each person/family and situation as unique• Provide empathy and be able to “put oneself in the other person’s shoes”• Will make an honest effort to empathize with the emotional connection and cultural context that the persons engaging in services bring to the recovery/resiliency relationship• View everyone as having something important and unique to contribute• Value and treat others with kindness, warmth, dignity, and without judgment• Accept each other and are open to sharing with people from many diverse backgrounds including ethnicity, educational levels, socio-economic background, sexual preference, and religion/spirituality• Honor and make room for everyone’s opinions and see each other as equally capable of contributing• Demonstrate respect toward those supported, colleagues and the community.• Use language that is respectful, “person-first,” and culturally mindful to, and with, those supported, colleagues and the community• Never use language that could be construed as, or is, derogatory, insulting, or demeaning in written, electronic, or verbal communications



	<ul style="list-style-type: none"> • Communicate with co-workers and colleagues in ways that promote hope, compassion, and solution-focused interactions
Integrity	<p>Peer Support Specialists:</p> <ul style="list-style-type: none"> • Act in accordance with the highest standards of professional integrity • Avoid relationships or commitments that conflict with the interests of persons engaging in services, impair professional judgment, imply a conflict of interest, or create risk of harm to those supported • Conduct themselves in a way that does not jeopardize the integrity of the peer relationship • Seek supervision to handle any real or potential conflicts when and if a dual relationship is unavoidable • Follow organizational policies and guidelines regarding giving and receiving gifts • Consider the cultural context and other potential considerations related to gifts • Do not lend, give, or receive money or payment for any services to, or from, persons they support • Demonstrate accountability in fulfilling commitments • Resist influences that interfere with professional performance • Shall not commit fraud, waste or abuse in the delivery of Medi-Cal services • Cooperate with complaint investigations and supply information requested during complaint investigations unless such disclosure of information would violate the confidentiality requirements of Subpart 2, Title 42, Code of Federal Regulations • Shall not provide services under the influence of any amount of alcohol, marijuana, or illicit drugs. “Illicit drugs” means any substance defined as a drug in Section 11014, Chapter 1, Division 10, Health and Safety Code, except: <ul style="list-style-type: none"> o Drugs or medications prescribed by a physician or other person authorized to prescribe drugs, in accordance with Section 4036, Chapter 9, Division 2, Business and Professions Code, and used in the dosage and frequency prescribed; or o Over-the-counter drugs or medications used in the dosage and frequency described on the box, bottle, or package insert • Shall not secure a certification by fraud, deceit, or misrepresentation - this includes, but is not limited to: <ul style="list-style-type: none"> o Making a false statement on any application for certification o Withholding material information on any application for certification • Impersonating another Peer Support Specialist or permitting or allowing another person to use their certification for the purpose of providing peer support services • Shall not engage in gross negligence or incompetence in the performance of peer support services. This includes:



	<ul style="list-style-type: none"> ○ Failing to maintain records consistent with sound judgment, the standards of the profession, and the nature of the services being rendered
Advocacy	<p>Peer Support Specialists:</p> <ul style="list-style-type: none"> ● Support the formulation, development, enactment, and implementation of public policies of concern to the profession ● Demonstrate and promote activities that respect diversity ● Support and defend human rights and freedoms regardless of nationality, national origin, gender identity, ethnicity, religion or spiritual persuasion, language, disability, sexual identity, or socio-economic status. Human rights include civil and political rights, such as the right to life, liberty, and freedom of expression; social, cultural, and economic rights including the right to cultural expression, the right to have basic needs met, and the right to work and receive an education ● Advocate for inclusion of those supported in all aspects of services ● Advocate for the full involvement of those supported in the communities of their choice and will promote their value to those communities ● Understand, encourage, and empower self-advocacy ● Recognize that all individuals/families have the right to live in the safest and least restrictive, culturally congruent environment ● Strive to eliminate stigma and discrimination
Confidentiality	<p>Peer Support Specialists:</p> <ul style="list-style-type: none"> ● Respect the rights, dignity, privacy, and confidentiality of persons engaging in services at all times ● Respect the right to privacy of those supported and shall not solicit private information from those supported unless it is essential. Once private information is shared, standards of confidentiality apply ● Respect confidential information shared by colleagues in the course of their professional relationships and interactions unless such information relates to an unethical or illegal activity. However, confidentiality should be honored when Peers are supporting clients with a substance use disorder where the illegal activity is limited to personal use of substances ● Comply with all applicable federal and state confidentiality laws and guidelines. (In accordance with Part 2, Title 42, Code of Federal Regulations and HIPAA requirements) ● Discuss with persons engaging in services, and other interested parties, the nature of confidentiality and limitations of the right to confidentiality
Safety & Protection	<p>Peer Support Specialists:</p> <ul style="list-style-type: none"> ● Never engage in romantic or sexual/intimate activities with the persons engaging in services



	<ul style="list-style-type: none">• Shall not provide services to individuals with whom they have had a prior romantic or sexual relationship• Shall not engage in exploitive relationships with coworkers or those they support to further their personal, religious, political, or business interests• Follow applicable federal, state and local laws in the prevention of harm• Inform appropriate persons when disclosure is necessary to prevent serious, foreseeable, and imminent harm to persons served or other identifiable persons. In all instances, Peer Support Specialists should disclose the least amount of confidential information necessary to achieve the desired purpose• Never intimidate, threaten, harass, use undue influence, physical force, or verbal abuse, or make unwarranted promises of benefits to persons engaging in services• Recognize the unique nature of the peer relationship and seek supervision and/or peer support services, as necessary, to maintain appropriate boundaries with persons engaging in services• Treat colleagues with respect, courtesy, fairness, and good faith, and uphold the Code of Ethics. Strive to provide a safe environment that is respectful of the impact of trauma on persons engaging in services
Education	Peer Support Specialists: <ul style="list-style-type: none">• Remain current regarding new developments in recovery, resiliency and wellness theories, methods, and approaches of related disciplines/systems with whom those who are engaging in services interface• Accept responsibility for continuing education and professional development as part of their commitment to provide quality services• Become familiar with local resources for self-sufficiency, including benefits and employment opportunities and supportive resources for families, parents, and caregivers
Mutuality	Peer Support Specialists: <ul style="list-style-type: none">• Engage in a relationship of mutual responsibility where power is shared and the Peer Support Specialist and the persons engaging in services are equally responsible for maintaining a peer relationship that is mutually beneficial• Take responsibility for voicing their own needs and feelings.• Make decisions in collaboration with persons served and do not make decisions for persons engaging in services• Ensure that people give and take the lead in discussions, everyone is offered a chance to speak, and decisions are made in collaboration with one another



Reciprocity	Peer Support Specialists: <ul style="list-style-type: none"> • Ensure that the relationship is reciprocal. Every participant in the peer relationship both gives and receives in a fluid, constantly changing dynamic • Belief that peer relationships are not hierarchical; no one is more qualified, advanced, or better than another • Learn from each other • View asking for help as reaching across (not up nor down)
Strengths-Based	Peer Support Specialists: <ul style="list-style-type: none"> • Provide strength-based services acknowledging that every person has skills, gifts, and talents they can use to better their lives • Focus on what is strong, not what is wrong • Assist others to identify these strengths and explore how those identified strengths can be used for their benefit
Wellness, Recovery and Resiliency	Peer Support Specialists: <ul style="list-style-type: none"> • Engage in and model regular self-care activities • Communicate and behave in ways that promote wellness, recovery, and resiliency • Use language that reflects wellness, recovery, and resiliency principles • Shall not impose limitations on the possibility for wellness, recovery, and resiliency of those engaging in services • Recognize the importance of supportive relationships and community in wellness, recovery and resiliency and encourage persons to identify and develop natural supports • Promote self-sufficiency in the wellness, recovery, and resiliency journey

Special Settings and Populations

Under the current Medi-Cal Peer Support Specialist certification program, there are four areas of specialization that focus on special settings and populations for which peer support specialists can elect to receive further training. They are (1) Parent, Caregiver, Family Member Peer, (2) Peer Services in Crisis Care, (3) Peer Services for Unhoused, (4) Peer Services for Justice Involved. These specializations are achieved by completing additional State-approved trainings that build on the knowledge, skills, and abilities. The following are the core competencies for the specializations that have been established by the State with field examples.¹¹⁻¹⁴

Specialization: Parent, Caregiver, and Family Member Peer Support

Professional Responsibilities

- Demonstrating knowledge of basic workplace skills



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- Knowing the distinctions between peer support and clinical services
- Practicing cultural humility
- Applying ethical standards
- Conducting self with integrity
- Knowing and adhering to policies and procedures
- Understanding personal and professional limitations and implicit biases
- Incorporating standards of confidentiality
- Displaying professional appearance, attitude and communication
- Using self-disclosure appropriately
- Treating colleagues and clients with respect

Systems Knowledge and Navigation

- Demonstrating general knowledge of the educational systems and advocacy within that system
- Describing basic tenets of guardianship and trusts
- Promoting understanding of caregiver rights and responsibilities in system supports/behavioral health/recovery/resilience.
- Knowing the stages in the recovery process
- Recovery and resilience
- Managing crisis and emergency situations
- Demonstrating general knowledge of diagnostic profiles and treatment options

Resources and Natural Supports

- Demonstrating knowledge of community-based resources and how to access, including funding options
- Collaborating with groups to pool resources
- Negotiating successfully with the community partners to meet families' needs
- Assisting the family to identify goals and develop a plan for success across all life domains
- Demonstrating the ability to provide necessary information and options on resources and support to support families to make informed decisions
- Assisting families to identify and use natural supports
- Supporting families to access and navigate local resources
- Promoting positive family relationship building
- Creating opportunities for system partner relationship building
- Assisting family members to identify and build informal family and community supports
- Identifying transition resources

Wellness and Resiliency

- Using lived experiences to provide support, encouragement and hope
- Assisting families in building self-confidence / self-esteem



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- Assisting families in building stability in their lives (Maslow’s Hierarchy)
- Understanding the holistic view of family members’ physical, social, mental and spiritual strengths and needs
- Identifying family strengths, needs, and outcomes
- Participating in crisis and safety planning
- Understanding the holistic approach to wellness
- Designing self-care strategies (for providers and families)
- Understanding the impact of trauma, compassion fatigue, burnout and grief
- Promoting and modeling resiliency
- Incorporating recovery principles
- Providing wellness education resources
- Reinforcing positive parenting skills

Effecting Change

- Demonstrating effective communication strategies
- Promoting family voice and choice at all levels of systems service
- Assisting families in asserting their rights to meet their needs
- Supporting, teaching and coaching primary caregivers to identify and articulate their family’s needs and goals
- Engaging families to identify needed systems changes or issues
- Strategically sharing lived experience to effect policy change and assist families to do the same
- Partnering with families/caregivers and professionals to build collaborative relationships
- Articulating the values of fostering cooperation between families and family-serving systems
- Modeling effective strategies for families without being directive
- Reframing challenges using strength-based language
- Advocating in a solution-focused manner
- Mentoring
- Creating relationships that build resilience
- Mastering the use of interpersonal skills

Specialization: Peer Services in Crisis Care

Core competencies for this specialization is categorized under the following three continuum of crisis service opportunities: (1) Prevention, (2) During Crisis, (3) Post-Crisis/Recovery.¹²

1. Prevention

Pathways to Crisis

Understanding of various factors that may contribute to crises such as:

- Abuse (physical, emotional, psychological, sexual, financial, verbal, neglect, spiritual)
- Acute and long-term crisis
- Assault
- Community violence
- Drugs or alcohol
- Grief
- Homelessness
- Homophobia
- Lack of sleep
- Loss of relationships
- Medical crisis
- Mental health crisis
- Natural disaster
- PTSD
- Public health crisis
- Racism
- Suicidal thoughts
- Unemployment

Prevention, De-Escalation, and Crisis Resolution

- 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

Engagement and Resource Connection / Navigation

- 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



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- 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

Person-Centered, Trauma-Informed

- Meet people where they are, understand that they may not be ready to accept services or talk to someone 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 ACEs, 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

Co-occurring Disorders of Mental Health and Substance Use

- 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



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- 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 the prevalence of trauma in the lived experience of people with cooccurring 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

2. During Crisis

De-Escalation and Conflict Resolution

- 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



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- 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

Person-Centered, Trauma-Informed

- 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 someone 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 ACEs, 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

Co-occurring Disorders of Mental Health and Substance Use

- 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

Crisis and Special Populations

- Know strategies and be able to work with various subpopulations such as: Youth, Older Adults, Persons Experiencing Homelessness, LGBTQ+ 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

3. Post-Crisis / Recovery / Ongoing Peer Support

Crisis Planning and Support

- 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 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 someone about their trauma
- Support individual choice with decision-making and services received



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- Be alert to signs that a new crisis experience is starting
- Provide support in meeting legal sanctions such as Mental Health Court requirements

Self-Awareness and Self-Care

- 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
- 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 and 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

Specialization: Peer Services for Unhoused

Application of Lived Experience

- Share lived experience with mental illness, substance use, and/or homelessness to support an individual’s needs to build a trusting peer relationship
- Role model positive behaviors (e.g., self-advocacy, self-care, physical activity, therapy)
- Personal awareness of societal stigmatization and discrimination (e.g., victims of violence, denial of work or access to resources)

Empowerment and Promotion of Recovery

- Promote hope, the potential for change, and personal empowerment
- Help individuals identify and prioritize their own needs
- Understand the basic structures for systems navigation (i.e., mental health, substance abuse treatments, physical health, courts/jail, housing, Social Services)
- Help individuals to participate in their care as an active participant in decision-making
- Use warm handoffs for resources, including assistance in accessing resources
- Accompany individuals to community activities and appointments when appropriate



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- Encourage use of supportive relationships to help identify natural supports and other positive resources relevant to identified needs
- Assist individuals in discovery of healthy lifestyle choices and safety planning
- Help individuals identify and engage in meaningful activities in the community (e.g., social groups, hobbies)
- Support coordination of care to work towards identified goals
- Support individuals in strengthening and acquiring desired life skills such as accessing resources (food, employment, housing, etc.)
- Understand relevant rights and laws (i.e., housing and patient rights) to ensure rights are respected

Co-Occurring Disorders: Mental Health and Substance Use Disorders

- Strong understanding of best practice engagement and treatment approaches for mental illness, substance use disorders, co-occurring disorders, including physical health
- Understand various pathways to recovery such as abstinence, harm reduction models, Medication Assisted Treatment (MAT), and Medication Assisted Recovery (MAR) and how to support individuals to reach their goals through individual choice and self-determination
- Understand the Stages of Change, Recovery Capital (drawing on persons internal and external resources to support recovery), and recovery action planning (development of tools to help persons be well and stay well) to support individuals in their recovery
- Knowledge of how the effects of trauma can mirror mental health symptoms
- Understand the prevalence of trauma in the lived experience of people with experience of homelessness or underhoused
- Use of Motivational Interviewing to support individual's recovery
- Understand harm reduction models to support individuals in their recovery
- Be able to navigate mental health and substance use service delivery systems to support the person's access to and use of services
- Understand emergency and crisis interventions, including those for drug overdoses (i.e., Naloxone)
- Support peers in their recovery goals and to remain connected in their communities
- Provide peer support services to best support client engagement and participation in their own care

Special Populations and Cultural Considerations

- Based on population served, use of effective best practice and culturally responsive practices. Populations, include but not limited to: Adults/ Older Adults; Youth; LGBTQ+; Persons with persistent homelessness or housing instability; BIPOC; Co-Occurring disorders (mental health and substance use disorders); Co-Morbidity medical conditions (chronic and/or persistent medical conditions; criminal justice involved; immigrants/refugees; veterans
- Know and connect individuals to community resources and services specific to their intersectional identities



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- Remain aware of the effects and impact that disparate policies, laws, and systems have on subpopulations
- Understand increased risk of violence for persons who are unhoused, including risks associated with gender and race/ethnicity
- Recognize the signs of human trafficking, especially with youth

Trauma Informed Care

- Understand and utilize principles of trauma-informed practices and their application in peer services that support recovery
- Understand the prevalence of ongoing trauma in the unhoused population in exposure to violence, severed relationships, social isolation, exposure to human trafficking and its impact on physical, behavioral, and emotional wellness to help individuals in their recoveries
- Recognize how trauma may affect engagement and lead to patterns of disengagement in services
- Understand the historical and contemporary trauma, marginalization, and oppression of diverse populations, including cultural and ethnic minorities, LGBTQ+ individuals, those with mental health challenges and addictions, those with physical and developmental disabilities, criminal justice involved individuals, and veterans
- Understand traumas around government and law enforcement agencies
- Understand the effect of trauma through a cultural lens
- Be aware of trauma for persons with criminal justice involvement, including disparate sentencing, incarceration, threats, intimidation, stigmatizing labels within incarceration and criminal justice environments, as well as being victims of crime
- Understand and utilize trauma informed practices specific to specific populations
- Respond to personal risk indicators to assure welfare and safety of individuals
- Be aware of “relation trauma bonding” (difficulty leaving a situation due to a strong connection to person or situation) and the impact on individuals who are experiencing homelessness

Self-Awareness and Self-Care

- Prioritize self-care and personal wellness
- Understand burnout and use self-awareness to manage compassion fatigue, vicarious trauma, and secondary traumatic stress
- Develop and utilize self-care skills and coping practices for helping professionals
- Know resources to promote personal resilience
- Learn to respond appropriately to personal stressors, triggers, and indicators
- Use tools & techniques for entering “triggering” facilities
- Conduct themselves in a manner that fosters their own recovery



- Use of supervision for professional support and development

Conflict Resolution

- Recognize signs of distress to support individuals in their recoveries
- Recognize and 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
- Understand the cycle of de-escalation and utilize de-escalation techniques
- Understand the requirements of mandated reporting and immediately report abuse or neglect
- Understand and be able to utilize suicide prevention concepts and techniques
- Assist individuals to develop and activate self-management plans, advanced directives, relapse prevention strategies, crisis prevention strategies, and discharge goals
- Practice non-judgmental behavior

Professional Boundaries and Ethics

- Respect the privacy and confidentiality of those they serve
- Maintain healthy boundaries to avoid dual relationships or commitments that conflict with the interests of those they serve
- Establish and maintain a peer relationship rather than a hierarchical relationship
- Establish a respectful, trusting relationship with individuals
- Use a range of supervisory options to process personal feelings and concerns about clients
- Conduct self-evaluations of professional performance applying ethical, legal, and professional standards to enhance self-awareness and performance
- Recognize and address personal and institutional biases and behaviors
- Practice non-judgmental behavior
- Use supervision to find support to address or resolve issues

Safety and Crisis Planning

- Understand escalation and de-escalation cycles
- Recognize and take action to address distress or a crisis using knowledge of local resources, treatment, services and support preferences of individuals served
- Seek support from treatment team for addressing a crisis and develop a plan to best support the person's safety
- Recognize risk factors affecting person's ability to remain safely in the community
- Recognize risk factors associated with mental illness, substance use, physical health, living environment, and social supports exacerbated by homelessness



Orange County Health Care Agency – Behavioral Health Services

- Development of crisis/safety planning, inclusive of the identification of using person’s strengths (protective factors) to activate self-management plans, relapse prevention, and crisis prevention strategies
- Practice non-judgmental behavior.
- Immediately report suspicions if abuse or neglect are suspected
- Provide culturally appropriate/safe field-based services
- Be aware of one’s environment
- Travel with a partner when in the field
- Understand and practice health and safety practices
- Know protective strategies around Infectious diseases
- Be aware of personal safety issues in street outreach and personal interactions

Systems and Resource Navigation

- Operate from a “recovery is possible” perspective to peer support
- Know key definitions and types of homelessness (e.g., chronic homelessness, couch surfing) according to the Department of Housing and Urban Development (HUD) standards
- Know the “Housing First” approach to support individuals in their recovery
- Understand barriers to receiving services (e.g., lack of phone, transportation) and how to navigate these challenges
- Provide warm hand-offs to referred agencies and explain the necessity for the referrals so individuals understand and follow through
- Understand and effectively share housing program requirements to help individuals maintain housing
- Assist in accessing health care and other needed services
- Understand the judicial system, how it impacts those unhoused, and how to navigate it
- Develop a working knowledge of available healthcare benefits for individuals living with debilitating behavioral health conditions to help individuals navigate and choose between options
- Know how to acquire legal identification and verification documents of homelessness.
- Understand what the Homeless Management Information System (HMIS) is
- 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 while modeling effective coping strategies and interpersonal skills
- Provide outreach in the community
- Assist in obtaining and maintaining housing
- Consider multiple issues when assisting individuals with housing options, including disqualifying criteria, cultural considerations, safety, relapse environment, criminal justice experience, and stage of change
- Know how to find and access free and low-cost legal resources
- Know how to find and access resources for climate refugees (survivors of wildfire, flood, etc.)



Peer Services for Justice Involved

Application of Lived Experience

- Have lived experience in all or most of the continuum of the criminal justice systems, including arrests, detention, arraignment, court proceedings, sentencing, diversion, incarceration, probation, and/or parole
- Build rapport and trust through sharing lived experience
- Share personal lived experiences in ways that demonstrate how to advance in recovery and reentry
- Act as credible role models to individuals transitioning from criminal activity to pro-social behaviors, perspective, and expression
- Understand and apply mental health and substance use recovery concepts from a reentry perspective
- Support people to restructure attitudes, beliefs, and maladaptive behaviors learned as survival mechanisms, including those learned in criminal justice settings. Be able to communicate own lived experience in a way that is nonjudgmental
- Can promote hope, the potential for change, and personal empowerment
- Understand and apply recovery concepts from a reentry perspective
- Share personal lived experiences following reentry and model the ways to advance recovery through coaching
- Embody the potential for recovery for people who confront the dual stigmas associated with serious mental illnesses and criminal justice system involvement
- Maintain freedom and model hope for a future free of incarceration
- Help individuals evaluate their choices more effectively and provide guidance about appropriate interpersonal skills and ways of coping, ultimately increasing self-efficacy
- Inspire hope and the possibility of positive change through appropriate self-disclosure of their own histories, by consistently modeling recovery behaviors, and being a continual role model in recovery from addiction and crime
- Be able to identify and address barriers to success that prevent rehabilitation

Role of Advocacy

- Communicate to individuals their rights and responsibilities
- Act as advocates for individuals at the individual and systems levels
- Model appropriate advocacy within the varying service delivery systems
- Promote recovery principles including self-advocacy and empowerment strategies
- Improve civic engagement to support self-advocacy
- Assist individuals in advocating for the correction of inaccurate entries in their criminal records
- Work with individuals to explain misleading charges or convictions to potential landlords or employers
- Knowledge of linkage to legal aid resources



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- Knowledge of resources to employment opportunities for individuals re-entering the community
- Advocate for recipients of behavioral healthcare when they are unable to advocate for themselves
- Knowledge of diversion programs, including advocacy and access to services
- Educate stakeholders in the criminal justice system about mental health and substance use recovery
- Model disclosure of justice involvement to reduce internal and social stigma
- Help navigate child welfare issues and/or support meeting mandate requirements
- Support with navigation and resources of other human services systems (housing, social security, employment, etc.)
- Knowledge of resources to address cooccurring issues/conditions, including mental health, substance use disorder treatment, and physical health care

The Role of Consumers and Family Members

- Use strengths-based approaches when interacting with individuals, setting goals, and engaging with communities
- Support individuals in strengthening or acquiring life skills
- Help individuals learn emotional regulation skills (i.e., mindfulness, attention shifting, forward looking, and reframing).
- Use trauma-informed approaches to understand the impact on social isolation from community and family or natural support systems previously in place
- Motivate individuals to meet required justice involved obligations, including initial detention/diversion, presentencing, and/or post-release
- Role model appropriate advocacy throughout the justice involved continuum
- Create healing relationships based on respect, compassion, open and honest communication, active listening, and cultural humility
- Foster individual choice and self-determination
- Use active listening and empathic skills
- Communicate genuine emotion and support individuals in identifying and expressing emotions
- Recognize and use person-centered language
- Utilize a wellness-focused approach to recovery
- Support in setting personal goals and assist individuals in making steps towards reaching them
- Understand the Stages of Change, Recovery Capital, and Recovery Action Planning
- Offer empathy and validation in addition to offering suggestions and strategies for overcoming challenges
- Apply and promote self-empowerment and recovery principles including self-advocacy
- Help individuals identify beliefs and values they hold that work against their recoveries
- Support Peers in identifying core values and beliefs that will support them in their recoveries
- Demonstrate consistent support to individuals during times of wellness as well as during challenging times
- Demonstrate non-judgmental behavior and listening



Orange County Health Care Agency – Behavioral Health Services

- Use open-ended questions that connect a person to his/her/their inner wisdom and move through their fears
- Communicate from a place of compassion
- Use trauma-informed principles and approach to support helping individuals find meaning and purpose in their lives, fulfill valued roles, and engage with their community in a meaningful way
- Address internal and external stigma surrounding incarceration, mental health and/or substance abuse
- Emphasize strengths and connect to resources
- Take into account the person’s life stage when providing support

Engagement Skills and Interventions

- Remain genuine and non-judgmental
- Practice unconditional positive regard
- Know and utilize techniques that support engagement such as Motivational Interviewing (MI) and Seeking Safety
- Help individuals identify beliefs and values they hold that work against their recovery in order to support their recovery
- Use questions to help individuals get in touch with the life they want
- Understand the Cycle of Escalation and De-escalation
- Use positive behavior supports and contingency management
- Teach emotion regulation skills
- Model and teach self-control strategies
- Understand skill building techniques
- Use techniques to increase skills that promote self-efficacy
- Partner with other service providers to support recovery
- Encourage justice involved individuals to disclose information pertaining to arrest, charges, probation/parole conditions when it supports their success plan
- Support justice involved individuals with abiding by their mandate conditions with special attention to challenges impacting special populations, such as “290 status” registrant, batterer’s intervention program and requirements for registering as violent offender, etc.
- Encourage justice involved individuals to get involved with supportive networks that can address their criminogenic needs (i.e., AA/NA, Anger management groups, parenting groups, etc.)
- Embrace true collaboration as an ongoing process and invest in its development to ensure a sustained culture of collaboration
- Contribute to the achievement of common goals by giving power and respect to each person’s voice, integrating individual differences, resolving competing interests, and safeguarding the essential contribution each makes in order to achieve optimal outcomes
- Act with a high level of personal integrity and hold others accountable for doing the same
- Demonstrate competence appropriate to his/her/their role and responsibilities



Cultural Responsiveness

- Awareness of one’s own personal values, culture, and spiritual beliefs; how they may contribute to one’s own judgments, biases, and beliefs about others; and how to respond if they interfere with one’s ability to effectively serve another individual (implicit and explicit biases)
- Knowledge of stigma and biases surrounding persons with justice involvement
- Have knowledge of the influence of culture (including the subculture that surrounds jails/prisons, gang culture, drug use, etc.) on individuals and groups
- Have knowledge of and sensitivity to how cultural identity can influence the dynamics in communication to support individuals in their recovery
- Appreciate, recognize, and respect the personal values, cultural, spiritual beliefs, and practices of peers and their families
- Understand the concept of “seeking out common ground” to support individuals in their recovery
- Understand the impact of current and historical structural racism and how it creates disparities, including disparities in wealth, employment, education, housing discrimination, government surveillance, incarceration, drug arrests, and immigration matters
- Understand how current and historical structural racism impacts overall health and recovery outcomes for people of color
- Recognize the connections between behavioral health conditions, trauma, health disparities, and social inequity to support individuals in their recovery
- Support an individual with their recovery by interacting with purpose and with a cultural lens, including the use person-centered language
- Advocate for multiple pathways to recovery/wellness
- Use dignity and respect with all people, no matter ethnicity, race, gender identity, sexual orientation, age, religion, national origin, marital status, political belief, mental or physical disability, or any other preference or personal characteristic, condition or state
- Know strategies for working with adults and youth with justice involvement to support individuals in their recovery
- Know strategies and be able to work with various subpopulations such as: youth, older adults, persons experiencing homelessness, LGBTQ+ individuals, persons with chronic or persistent health conditions, and physical and developmental challenges
- Know and be able to link individuals to resources and services specific to their intersectional identities

Trauma-Informed Support

- Have awareness of trauma arising from individuals’ criminal justice experiences, including but not limited to: police-induced trauma, disparate sentencing, incarceration, threats, intimidation, and stigmatizing labels within incarceration and criminal justice
- Understand the impact of environmental trauma and conditioning
- Understand the historical and contemporary trauma, marginalization, and oppression populations, including cultural and ethnic minorities, and LGBTQ+ individuals experience



Orange County Health Care Agency – Behavioral Health Services

- Understand the prevalence of trauma and its impact on physical, behavioral, and emotional wellness to offer trauma-informed peer services
- Be familiar with the ACE (Adverse Childhood Events) model to offer appropriate trauma-informed Peer services. Recognize signs of distress and risk indicators that may affect the individual's welfare and safety and respond appropriately
- Support the development of healthy behavior that is based on choice
- Teach coping skills of emotional regulation, mindfulness, stress reduction, anxiety management, distress tolerance, and relaxation techniques
- Be non-judgmental

Self-Awareness and Self-Care

- Recognize the importance of self-care and activate self-care skills and coping practices for helping professionals
- Know the importance of ongoing support for overcoming stress in the workplace
- Know resources to promote personal resilience and incorporate these into daily life
- Understand burnout and use self-awareness to manage compassion fatigue, vicarious trauma and secondary traumatic stress
- Strengthen social skills and healthy social networks including peer and natural support systems
Be able to discuss their own tools for taking care of themselves to support others in their recoveries
- Learn to respond appropriately to personal stressors, triggers and indicators
- Use tools & techniques for entering “triggering” environments and create plans for potentially triggering situations prior to them occurring
- Understand the dynamics of power, conflict and integrity in the workplace to maintain wellness
- Anticipate and avert or safely manage any re-experience of symptoms of their own challenge(s) to ensure continued wellness
- Develop a working knowledge of the concepts of “activation” and “self-management” to maintain 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 their own recovery

Co-occurring disorders of mental health and substance use

- Understand the vulnerability of individuals with a history of mental illness or substance use who've been recently released from corrections
- Understand the Stages of Change to support with identifying and obtaining goals
- Knowledge of available substance use disorder services, including Medication Assisted Treatment (MAT) services (i.e., counseling and medications for treatment of alcohol, opioid, and opioid overdose)



Orange County Health Care Agency – Behavioral Health Services

- Foster individual choice and self- determination
- Have a basic understanding of the Disease Model of Addiction and the difference between prevention, treatment, and recovery
- Understand harm reduction models and recovery action planning to support recovery
- Understand “recovery capital” principles (internal and external resources)
- Provide peer support services even if individuals are not actively engaged in treatment
- Demonstrate consistent support to individuals during times of wellness as well as during challenging times
- Support peers to be part of recovery groups and communities to stay active and around others in recovery
- Use questions to help individuals get in touch with the life they want and help identify steps to creating them
- Assist individuals in recognizing the effect of substance abuse on life challenges and consequences of continued use
- Provide education regarding warning signs, symptoms, and progression of substance use disorders
- Be familiar with relapse prevention strategies to support the prevention of recidivism
- Provide education on how substance use challenges affect self, family, and community
- Be able to help individuals navigate treatment services and recovery supports
- Recognize the importance of a holistic (e.g., mind, body, spirit, environment) approach to recovery/wellness to support individuals in their recovery
- Partner with other service providers

Professional Boundaries and Ethics

- Adhere to Code of Ethics for certified Medi-Cal Peer Support Specialists
- Perform all job duties in accordance with federal and state rules and regulations and published code of ethics and professional conduct for credentialed Peer Support Specialists
- Understand legal requirements as a Mandated Reporter of abuse and neglect
- Adhere to professional obligations/responsibilities and limits of the certified Medi-Cal Peer Support Specialist role
- Recognize situations outside the competencies of a certified Medi-Cal Peer Support Specialist
- Use supervision to assure individual is appropriately served (i.e., advocacy, education, confidentiality, skills development, boundary setting, etc.)
- Recognize and maintain professional and personal boundaries
- Establish and maintain a peer relationship rather than a hierarchical relationship
- Demonstrate respect and nonjudgmental attitudes toward individuals in all contacts with community professionals and agencies
- Maintain confidentiality of individual information in written and oral communications in accordance with confidentiality laws, including Health Information Portability and Accountability Act (HIPAA) and 42 C.F.R. Part 2



Orange County Health Care Agency – Behavioral Health Services

- Understand how to establish, negotiate, and maintain appropriate interpersonal limits and boundaries that are necessary to promote effective peer support services
- Maintain boundaries and resist the temptation to partner with individuals “against the system,” especially in the face of perceived or actual injustice. Similarly, Peer Support Specialists do not partner with the “system” against the individual, or act as an agent of the system
- Conduct self-evaluations of professional performance applying ethical, legal, and professional standards to enhance self-awareness and performance
- Never intimidate, threaten, harass, use undue influence, physical force or verbal abuse, or make unwarranted promises of benefits to the individuals they serve
- Communicate personal issues or concerns, as appropriate, with supervisors that negatively impact the peer worker’s ability to perform job duties
- Appropriately utilize supervision and consultation regarding issues that arise and that may interfere with the ability to effectively perform job duties
- Use organizational/departmental chain of command to address or resolve issues
- Recognize and address personal and institutional biases and behaviors
- Maintain current, accurate knowledge of trends and issues related to wellness and recovery
- Maintain high standards of personal conduct that fosters recovery
- Do not enter into dual relationships or commitments that conflict with the interests of those served
- Do not use unprescribed or illegal substances under any circumstance
- Do not accept gifts of significant value from those served

Safety and Crisis Planning

- Practice non-judgmental behavior
- Use effective communication, conflict resolution, and problem-solving skills
- Recognize and respond to various risks, crisis, and emergency situations
- Understand and utilize de-escalation techniques and provide reassurance to peers in distress
- Identify indicators that the 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 (escalation cycle)
- Recognize risk indicators that may affect the individual's welfare and safety
- Respond to personal risk indicators to assure welfare and safety.
- Understand and utilize the concept of ‘seeking out common ground’
- Be able to personally deal with conflict and difficult interpersonal relations
- Demonstrate consistency by supporting individuals during ordinary and extraordinary times
- Recognize signs of distress and threats to safety among individuals and in their environments
- Understand and practice risk assessment, suicide prevention, and safety planning
- Take action to address distress and/or crisis using knowledge of local resources, treatment, and resources to support a person’s recovery
- Assist individuals to develop and activate self-management plans, advanced directives, relapse prevention strategies, and crisis prevention strategies



- Report any suspicions of neglect or abuse

Community Reintegration Support

- Have a basic understanding of mental health and substance use challenges and the behavioral health system
- Provide care coordination services within the behavioral health delivery systems and across other service delivery sectors (i.e., physical health, child welfare, courts, probation/parole, community resources, etc.)
- Support maintaining sobriety and access to recovery-focused resources
- Have knowledge of criminal justice systems and provide support throughout the process, including arrests, detention, arraignment, court proceedings, sentencing, diversion, incarceration, probation, and/or parole
- Understand service delivery systems and assist individuals to link to and navigate housing, employment, community sobriety services and supports, relapse prevention, mental health services and supports, education, transportation, healthcare, and free or low-cost legal resources
- Have awareness challenges faced by individuals with justice involvement, including navigation of referrals, accessing referral source, and barriers to follow up on referrals
- Evaluate the effectiveness of interventions at various intercept points along the continuum of justice involvement
- Identify positive supports and prosocial associates, thus targeting a peer-centered reduction of criminogenic factors
- Have strong knowledge of client rights for diverse service sectors to support advocacy and coach self-advocacy
- Gather information and offer support through advocacy, skills development, and referral and do not offer advice or opinions on legal matters.
- Help individuals learn positive prosocial behavior and get them engaged in meaningful activities in the community
- Improve civic engagement to support self-advocacy
- Help individuals learn about changes in technology and trends that have occurred while incarcerated
- Help individuals assess their own needs and provide them with referrals to appropriate community resources. Assist individuals in identifying support systems consistent with individual needs
- Research and maintain up-to-date information about community resources and services, including available resources geared towards specific populations such as services for youth, veterans, and LGBTQ+
- Model effective coping strategies and interpersonal skills such as: communication skills, emotional regulation, conflict resolution, etc.
- Encourage individuals to function as an active member of their treatment/recovery support team
- Provide warm hand-offs to referred agencies and explain the necessity for the referrals so individuals understand and follow through



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- Evaluate outcomes of services received from referrals to determine need for change of referral services
- Accompany individuals to community activities and appointments when requested. Consider multiple barriers and challenges when helping an individual prepare for employment and education, including job search, navigating application process, interviewing, and attire
- Support and coach individuals with finding and maintaining employment
- Assist Individuals in discovery of healthy lifestyle choices, help them to engage in meaningful activities in the community, and encourage positive pro-social behaviors
- Help individuals identify barriers to completing probation requirements and supporting them in overcoming those barriers
- Remain an advocate when interacting with other service providers and educate service providers on engaging consumers with criminal justice history
- Consider multiple issues when assisting individuals with housing options, including disqualifying criteria, cultural considerations, safety, relapse environment, type of offense, level of risk, stage of change, and history of recidivism
- Understand the potential legal and community limitations of charges for some, such as “290” and arson registrations
- Provide a safe, non-judgmental space to persons in the early stages of reentry
- Support individuals to have accountability
- Assist individuals with understanding and navigating the criminal justice system
- Be able to constructively partner with support team
- Provide aid, support, and motivation for meeting required mandates attached to any processes in the entire continuum of criminal justice involvement
- Peer Support Specialists are not agents of the criminal justice system, and do not act as against the individual served
- Understand the Sequential Intercept Model and principles
- Evaluate the effectiveness of interventions at various points of contact
- Help reduce the time individuals stay in jail/prison through support, advocacy, and care coordination
- Help people to negotiate and minimize continuing criminal sanctions through coaching, skills development, and role modeling as they make progress in recovery and meet criminal justice obligations
- Provide information on the rights and responsibilities of discharged offenders and on satisfying criminal justice system requirements and conditions (probation, parole, etc.).
- Provide practical support by accompanying the person to initial probation meetings or treatment appointments
- Know succinct clearances and restrictions on contact with peers on parole or previously incarcerated

Recidivism Risk Factors



- Understand criminogenic needs as they relate to recidivism. The eight most significant criminogenic needs are: antisocial behavior; antisocial personality; criminal thinking; criminal associates; dysfunctional family; employment and education; leisure and recreation; and substance abuse
- Understand how trauma can correlate with substance use (including self-medication) and criminal behavior
- Understand how environmental factors such as their community may influence relapse or criminal behavior
- Understand how mental illnesses associated with mania, extreme paranoia or hallucination may increase chances of law enforcement contact and incarceration
- Discuss risks and protective factors that influence a person’s behavior
- Teach skills that impact criminogenic needs
- Share and role model own changes in own criminogenic thinking and behaviors

Other Considerations

Peer Drift

Due to the non-clinical nature of peer support services, role confusion and ambiguity around the duties and functions of peer support specialists are common and may lead to peer drift. Peer drift happens when the role of the peer support specialist begins to deviate from the practices that distinguish peer support specialists from clinical providers or other recovery supports. In peer drift, the role of the peer support specialist “drifts” in different directions depending on organizational and individual situations, circumstances and culture – which could result in peer support specialists not being considered a legitimate part of the support team and/or cause insecurity around their peer support role.¹⁵ SAMHSA categorizes peer drift into two broad categories, organizational and individual.

- **Organizational peer drift** occurs when non-peer colleagues marginalize peer support specialists, which can result in peer support specialists being assigned tasks that do not align with their dedicated duties and responsibilities. This is more likely to take place if the non-peer staff are unfamiliar with the role, code of ethics, and scope of peer support practice. As a result, non-peer staff may not regard the peer support specialist as individuals with meaningful knowledge and resources, assigning tasks that conflict with their purpose. Examples include peer support specialists being asked to handle medications, oversee urine drug screens, answer phones, or be involved with involuntary treatment. In addition, they may be asked to do tasks for which they are not qualified, such as those associated with formal treatment and other services that are more clinical in nature.¹⁵
- **Individual peer drift** occurs when the peer support specialist acts in a role that differs from the intended peer support role. This may occur when the peer support specialist tasks inadvertently take on characteristics of their colleagues in clinical roles or when their tasks are perceived as more informal and casual by those receiving services. For example, a peer support specialist working in traditional or medically oriented settings may drift by adopting a more clinical approach to service provision. Conversely, boundary issues may arise when supportive relationships become less



structured and more casual, which can cause the peer support specialist to be seen as a sponsor, friend, or informal therapist.¹⁵

To avoid peer drift, peer support specialists should have a defined role that reflects the setting they work in and services they provide. They should also work with and be supervised by staff who are familiar with the peer support role and services provided. The below table ¹⁵ can be a good starting point to those unfamiliar with provision of peer support services.

What Peer Support Specialists Should Do	What Peer Support Specialists Should NOT Do
Serve as a role model	Act as a sponsor, therapist, or clinician
Provide support throughout the continuum (onset, early intervention, long-term recovery, crisis/acute)	Assess, diagnose, or treat an individual
Help with goal setting and wellness planning	Influence individuals towards medication or treatment they do not want
Make connections with other services and supports	Assimilate into other roles

Additionally, the following table can help peer support specialists and supervisors recognize peer drift and ensure that the peer identity is not compromised.¹⁶

Peer Identity	Peer Drift
Comfort using recovery story as a tool	Discomfort using recovery story as a tool
Self-confidence, security and pride about identifying as peer support specialist	Self-doubt, insecurity, and shame about identifying as peer support specialist
Peer support relationship as an opportunity for mutual learning experience	Peer support relationship as an opportunity for expert instruction
Focus on strengths, skills and opportunities	Focus on problems, barriers, symptoms, and diagnoses
Keep interactions simple, authentic, and real	Distant interactional style that focuses on more professional and objective standards
Advocate for clients to find their own voices, make self-determined choices and take calculated risks in service of recovery and attainment of goals	Encourage compliance with professional advice, defer decisions to others, and avoid challenging situations that may be stressful

For more information on guidelines, standards, and best practices for supervisors of peer support specialists, please refer to BHS Practice Guideline on Supervision of Peers.



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BEHAVIORAL HEALTH PEER SUPPORT SERVICES

PRACTICE GUIDELINES QUICK GUIDE

WHAT IS PEER SUPPORT?

Activities and interactions between people who share similar experiences related to the recovery process with mental health conditions, substance use disorders, or both. Support is provided through “shared understanding, respect, and mutual empowerment.”¹

It can include advocacy, linkage to resources, sharing of experience, community and relationship building, group facilitation, skill building, mentoring, goal setting, and more.²



WHO PROVIDES PEER SUPPORT?



Peer Support Specialists (PSS) - Individuals that self-identify as having lived experience with the process of recovery from mental illness, substance use disorder or both, either as a consumer of these services or as the parent or family member of the consumer, that use that lived experience plus skills learned in formal training.³

They are expected to be willing to share their experience, have a strong dedication to recovery and successfully complete the training requirements.³

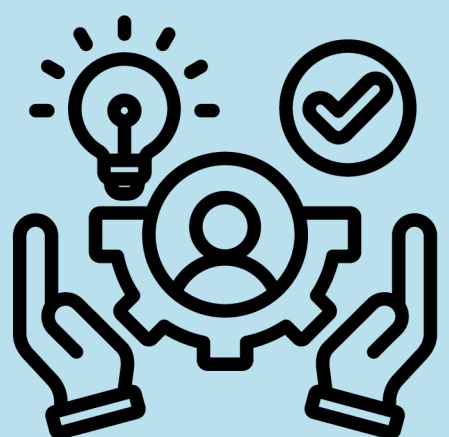
The key difference from other providers is the ability to draw from lived experience and experiential knowledge.

17 PEER SUPPORT CORE COMPETENCIES

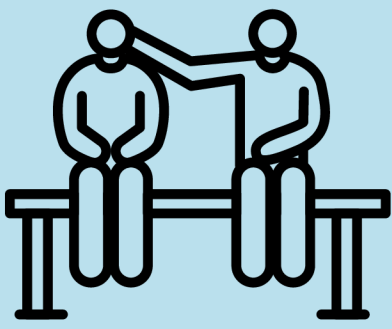
Following 17 core competencies established by the State of California are set of knowledge, skills and attitudes a person needs to successfully perform peer support roles.⁴

- The concepts of hope, recovery, and wellness
- The role of advocacy
- The role of consumers and family members
- Psychiatric rehabilitation skills and service delivery, and addiction recovery principles, including defined practices
- Cultural and structural competence trainings
- Trauma-informed care
- Group facilitation skills
- Self-awareness and self-care
- Co-occurring disorders of mental health and substance use
- Conflict resolution
- Professional boundaries and ethics
- Preparation for employment opportunities, including study and test-taking skills, application and résumé preparation, interviewing, and other potential requirements for employment
- Safety and crisis planning
- Navigation of, and referral to, other services
- Documentation skills and standards
- Confidentiality
- Digital literacy

See full practice guidelines for key skills, attitudes, approaches and examples for each competency



TYPES OF PEER SOCIAL SUPPORT



Recovery is facilitated by social support, and peer support specialists are uniquely positioned to provide these four key types of social support as part of peer support services:⁵

- Emotional - demonstrate empathy, caring, or concern to bolster person's self-esteem and confidence (e.g., peer mentoring, peer-led support groups)
- Informational - share knowledge and information and/or provide life or vocational skills training (e.g., parenting class, job readiness training)
- Instrumental - provide concrete assistance to help others accomplish tasks (e.g., transportation, help accessing health and social services)
- Affiliational - facilitate contacts with other people to promote learning of social and recreational skills, create community, and acquire a sense of belonging (e.g., wellness recovery centers, sports league participation)

WHAT PEER SUPPORT SPECIALISTS SHOULD/SHOULD NOT DO



What PSS Should Do⁶

- Serve as role models
- provide support throughout the continuum (onset, early intervention, long-term recovery, acute, crisis)
- Help with goal setting and wellness planning
- Make connections with other services and supports

What PSS Should **NOT** Do⁶

- Act as sponsor, therapist, or clinician
- Assess, diagnose, or treat an individual
- Influence individuals towards medication or treatment they do not want
- Assimilate into other roles



BE AWARE OF: PEER DRIFT

Peer drift happens when role of peer support specialists begin to deviate from the practices that distinguish peer support specialists from other providers. It can include being asked to do tasks that do not align with their role and scope, and can result in approaches and characteristics that tend to be more clinical in nature or more informal and casual in nature. To avoid peer drift, peer support specialists should work with and be supervised by staff who are familiar with peer support role and services.⁷



Strong Peer Identity

- Comfort using recovery story as a tool
- Self-confidence, security and pride about identifying as PSS
- Peer support relationship as an opportunity for mutual learning experience
- Focus on strengths, skills and opportunities
- Keep interactions simple, authentic and real
- Advocate for clients to find their own voices, make self-determined choices and take calculated risks in service of recovery and attainment of goals

Peer Drift

- Discomfort using recovery story as a tool
- Self-doubt, insecurity and shame about identifying as PSS
- Peer support relationship as an opportunity for expert instruction
- Focus on problems, barriers, symptoms and diagnoses
- Distant interactional style that focuses on more professional and objective standards
- Encourage compliance with professional advice, defer decisions to others, avoid challenging situations

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4. California Mental Health Services Authority (2022). Training Curriculum - General Peer Specialist Core Competencies. <https://www.capecertification.org/landscape-analysis-peer-certification-training-curriculum/>

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