



Mental Health Peer Specialist Training Policy and Procedure Manual

Effective January 1, 2019

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INTRODUCTION

Peer Support and Peer Support Services

Via Hope uses the following definition of peer support: peer support is the act of people who have had similar experiences with mental health challenges giving each other encouragement, hope, assistance, guidance, and understanding that aids in recovery. It can be done anytime or anywhere when two or more peers are in a mutual, supportive relationship.

Peer support services are programs, discussions, events, groups, etc. within the mental health system that are led by people in recovery and based on the philosophy of peer support. They typically take place within the structure of an agency or organization and are provided as a service by a trained peer specialist.

During the Texas 85th Legislative session House Bill 1486 (Peer Specialist Services) was passed into law. As a result of the implementation of House Bill 1486 Via Hope no longer serves as the certifying body for peer specialists. Effective January 1, 2019 Via Hope will provide only the training for Mental Health Peer Specialists.

Mental Health Peer Specialists

A Via Hope Mental Health Peer Specialist (MHPS) is an individual who has: progressed in their recovery, taken training, and passed a certification knowledge assessment demonstrating that they have mastered a set of competencies related to peer support. An MHPS has been trained in a number of skills and areas of knowledge in order to support the recovery of other individuals, including how to effectively share their lived experiences. Mental Health Peer Specialists may work in any organizational setting – public or private mental health, peer-run organization, criminal justice, education, juvenile corrections, or veteran’s services, for example.

As in many other professions, once an individual becomes a Mental Health Peer Specialist, they are expected to take additional training in one or more areas of specialization (referred to as Endorsements) to continue developing their skills in those areas. Via Hope offers a variety of Endorsement trainings for Mental Health Peer Specialists each year; a list of current Via Hope Endorsement trainings can be found in the Continuing Education section of this manual.

VIA HOPE – WHO WE ARE

Our Identity Statement

Invest. Re-envision. Respond.

Via Hope invests in people and organizations who want to re-envision mental health through workforce development, community building, system transformation, and leadership development.

We exist to amplify the vision that all people, families, and communities deserve to thrive and not just survive! For us, this will look like:

- Self-determination for all people and families in decisions related to their health and spirit;
- Systems imbued with core principles of resiliency, compassion, and trust, that listen and respond to the needs of their communities;
- A socially and politically equitable world free from stigma; and
- A culture where authenticity and transparency around lived experience is seen and valued as a necessary strength in leadership.

For more information about Via Hope's vision of our work and our future, please visit www.viahope.org/about/.

Contact Information

Contact Via Hope at:

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APPLICATION PROCESS

Qualifications for Acceptance to Training

Working as a Mental Health Peer Specialist (MHPS) or a Recovery Support Peer Specialist (RSPS) can be an immensely rewarding occupation - it is a way for individuals who are in recovery to help others experience recovery. It is not the right job for everyone, however, and individuals need to be sure they want continued employment as a peer specialist before investing their time and resources in attending the certification training.

Individuals are encouraged to work or volunteer as a peer specialist prior to applying to attend the certification training. The selection criteria described below for applications to the specialized training includes an individual's prior experience providing peer support services.

To be eligible to attend the MHPS or RSPS training, an individual must:

- Be age 18 or older;
- Be a high school graduate or have completed a G.E.D.;
- Self-identify as a person who has direct personal experience living in recovery from mental health challenges;
- If applying for MHPS training, have a primary diagnosis of a mental health condition or dual diagnosis, rather than just a substance use diagnosis, or have experienced emotional distress which significantly disrupted one's life;
- Have significant experience working on their own recovery and an ability to manage their own wellness;
- Have a desire to use their experiences to help others with their recovery; and
- Be willing to publicly identify as a person living in recovery for the purpose of educating, role modeling, and providing hope to others about the reality of recovery.

Steps in the Application Process

Following is a summary of the steps for this new training and certification process. You must complete each step, in order, to be eligible for certification.

1. Review the online orientation materials on the Via Hope website and complete the self-assessment at the end. You must sign the acknowledgement at the end that you have reviewed the materials. This will enable you to apply for training on the Core Principles of Peer Support ("Core" training).
2. Apply and take the Core training. Complete the application and submit along with payment by credit card. The current fee is \$75. Application for the Core training is not a competitive process; all eligible applicants are accepted.

The Core training is an eight hour, facilitated and interactive webinar held weekly. You must register at least two days prior to the next scheduled training. Once your application and payment are received by Via Hope, you will be sent an email with instructions for logging onto the training. At the end of the Core training is a short knowledge assessment (i.e. a quiz). Once you complete and pass the quiz you will be able to apply for specialized training.

3. Apply for the specialized training in either mental health or substance use peer support. The training to become an MHPS is a competitive process. If you are accepted, you will be sent an invoice for payment by credit card and information about the training. The current registration fee is \$650. The specialized training is a five day, 40 hour, classroom style training held in various cities around the state. Refer to our training calendar for details.

At the end of the specialized training, you will get an email with a link to take an online knowledge assessment. Once you complete and pass the knowledge assessment you will receive instructions for downloading and printing a confirmation that you have successfully completed all the steps in the training process. You will need this document to apply for certification

4. Apply for certification with one of the approved certification entities ([Texas Certification Board](#) or [Wales Education Services](#)). Refer to their websites for information on how to apply, what documentation is needed, and the cost. Via Hope is not involved in this Certification process and cannot provide any additional information. The initial certification is valid for six months. During this time, you must complete 250 hours of supervised work experience. You may then apply for re-certification for a full two year certification period.

The application process is initiated through the Via Hope website at www.viahope.org.

Registration Fees

There are registration fees for the core training and for the specialized training which cover the administrative time required to coordinate the trainings, the cost of the trainers, the printed materials, and lunch provided as part of training. If an individual is accepted for the specialized training, they are sent an invoice which must be paid (by the individual or their employer) prior to the training. Payments are made by credit card through the Via Hope website.

Individuals or their employers are responsible for arranging and paying for their own transportation to the training site, lodging during the training, and for their morning and evening meals.

Scoring System for Applications

Enrollment in the specialized training is limited to a class size of twenty-four participants in order to maintain a comfortable learning environment. Via Hope typically receives significantly more applications than there is space for each specialized training, and a scoring rubric is used to review and rank applications. The scoring system considers factors such as:

- Prior employment or volunteer experience as a peer specialist;
- Understanding of the role of a peer specialist;
- Whether the person has developed a WRAP or is a WRAP facilitator; and
- How an applicant can speak to a series of questions about the individual's recovery experience and prior training.

Self-Care

Like any job in the mental health field, employment as a Mental Health Peer Specialist can be stressful work, which is why strong daily practice around self-care is important for maintaining personal and professional wellness. For this reason, individuals interested in becoming a MHPS or RSPS are strongly encouraged to develop a self-care practice. For example, a Wellness Recovery Action Plan (WRAP) is a

simple self-help system for individuals to identify personal resources and then use those resources to maintain wellness.

Reasonable Accommodations

All Via Hope trainings are held in handicapped accessible locations. If an individual needs a reasonable accommodation to ensure a successful training experience, they indicate that on their application and Via Hope makes every effort to provide that accommodation.

Training in Prevalent Languages

Via Hope has translated the curriculum into Spanish and offers training at least annually in that language. If training is held in a location with enough population requiring training in a prevalent language, Via Hope will attempt to provide training in that language.

OVERVIEW OF THE CERTIFICATION TRAINING

The Mental Health Peer Specialist training that follows the core training is a forty hour in-person intensive course, spread over five days. In addition to in-person classroom training, this course includes homework or work sessions in the evenings. Before attending the trainings, all participants are required to complete the Pre-Training Manual, which contains four independent study pre-learning modules and a set of reflective questions. Once at the training, participants are expected to:

- Attend all five days of the training with no absences from the training room (*see note below*);
- Actively participate in discussions and role plays; and
- Complete all homework assignments.

Individuals who do not meet these criteria are not eligible to take the knowledge assessment.

Note: Via Hope expects participants to be present for the entirety of the training. However, Via Hope recognizes that important issues may arise that require participants to miss a portion of the training, which is why a participant may have the opportunity to miss a small portion of the training without being disqualified from taking the knowledge assessment. However, if a participant needs to be absent, they must confirm with both Via Hope and the trainers present. If a participant misses any portion of the training without prior approval from the trainers or Via Hope, they may lose their ability to take the knowledge assessment. Furthermore, if an individual misses more than four hours of the training in total, they will not be eligible to complete the knowledge assessment at the conclusion of the training week.

Training begins at 9:00 am on Monday and ends at 5:00 pm on Friday afternoon. The knowledge assessment is administered online and is available by 9:00 am on Saturday following the training. It typically takes up to two hours but is not timed. Lunch and breaks are provided each day. The training is provided in a relaxed, casual setting. However, this is training for employment in the workplace. Participants are expected to dress in casual but appropriate attire. No additional supplies are needed for the training; all course materials are supplied.

Overview of the Curriculum

A list of the curriculum modules follows. The Core certification training is intended to enable individuals to master the basic competencies necessary to function as an effective peer specialist. Mental Health Peer Specialists are required to take additional specialized trainings, referred to as Endorsements, to enhance their knowledge and skills and to maintain their certification.

Monday

Module 1: MHPS Orientation

Module 2: The Shoulders Upon Which We Stand

Module 3: MHPS Core Values, Ethics and Boundaries

Module 4: The Power of Language

Module 5: Five Stages of the Recovery Process

Module 6: Part 1: What are My Stories

Tuesday

Module 6: Part 2: Stories in Practice

Module 7: Opening the Door to New Perspectives: Stories in Practice

Module 8: Listening, the Art of Holding Space

Module 9: Group Facilitation & Recovery Dialogues

Module 10: Environment Matters

Wednesday

Recovery Stories

Module 11: Snippets

Module 12: Promoting Self Help

Module 13: Fueling the Power of Dissatisfaction

Thursday

Module 14: PICBBA

Module 15: Fear: Friend or Foe

Module 16: Meeting the Whole Person

Module 17: Ethics and Boundaries

Friday

Module 18: Change Agent

Expectations for Training Participants

All Via Hope trainings and events, including the certification training, are professional events that represent the field of peer support in Texas. Many of our events are held at host organizations in communities throughout the state. Although our events are often casual in nature, Via Hope expects all participants to act in a manner that positively represents the peer specialist workforce. Via Hope reserves the right to require a participant to leave a training or event early (and consider course participation incomplete) if a participant at a training or event:

- causes significant disruption (destruction of property, public intoxication, etc.);
- is disrespectful or rude to trainers, participants, event staff or other community partners;
- acts in any manner that violates the Mental Health Peer Specialist Code of Ethics (regardless of not yet having been certified); or
- demonstrates an inability to adhere to recovery oriented behavior.

Inappropriate behavior at any Via Hope-sponsored event may result in removal from the training, a temporary or permanent bar from attending Via Hope-sponsored events, and/or referral to the certifying body of Mental Health Peer Specialists for a formal ethical violation.

Finally, although each individual is responsible for their own recovery, Via Hope expects every participant to be mindful that their fellow participants may have different needs for their recovery and for supporting themselves throughout trainings or events. In the spirit of the Mental Health Peer Specialist Core Values, please treat all other participants with respect, mutuality, and authenticity.

KNOWLEDGE ASSESSMENT AND APPLICATION FOR CERTIFICATION

Individuals who have successfully completed the training and the knowledge assessment will be eligible to apply for an initial six month certification. The knowledge assessment is administered online and will be available the Saturday after training; it will remain available for 3 calendar days.

Individuals who do not pass the knowledge assessment the first time offered are eligible to re-take the knowledge assessment upon request. Individuals are notified within 3 business days following the knowledge assessment whether or not they passed.

Individuals who do not pass the knowledge assessment in two attempts must reapply to take the specialized training if they want to attempt the knowledge assessment for a third time. If a person who has failed the knowledge assessment twice applies for the specialized training, their application will be reviewed with the same weight as all other applications; therefore, Via Hope does not guarantee that a person who is applying to retake the training will be accepted. Individuals may apply to retake the training an unlimited number of times after two failed knowledge assessment attempts; however, once accepted to retake the training, you may only take the knowledge assessment one additional time (for a maximum of three (3) knowledge assessment attempts). If an individual fails the knowledge assessment

for a third and final time, they must wait two years to apply for training; once the two years have elapsed, the process restarts and prior rules apply.

CONTINUING EDUCATION

Following the initial six month certification and completion of the supervised work requirements, individuals apply for recertification. Subsequent certifications are valid for a period of twenty-four months from the date the individual is approved for certification by the certifying body. During that period the peer specialist is required to acquire a minimum of twenty (20) Continuing Education Units (CEUs).

Via Hope provides several opportunities to earn continuing education units, primarily through our in-person endorsement trainings. We also offer online continuing education, including peer-specific training on ethics. Opportunities for CEUs can be found on our website [here](#).

GUIDING PRINCIPLES FOR MENTAL HEALTH PEER SPECIALISTS

Via Hope's training for peer specialists assures peers, families, employers, and the public that individuals trained by Via Hope as peer specialists are qualified and competent in a set of educational principles and experiences needed to perform the responsibilities of a Mental Health Peer Specialist. Via Hope has adopted the following Core Values and Key Concepts, the Mental Health Peer Specialist Code of Ethics, and the Rules of Conduct listed below to ensure that each peer specialist will conform their behavior to the highest standards of ethical practice. Via Hope's standards equal or exceed ethical standards adopted by the certification entity(ies) for the HB1486 process.

Core Values & Key Concepts

In April 2017, the Certified Peer Specialist Advisory Council (the forerunner to the Mental Health Peer Specialist Advisory Council) adopted the following core values that serve as the foundation for all Via Hope Mental Health Peer Specialists in Texas:

1. *Authenticity*. The work of a Mental Health Peer Specialist is based on the relationships we build with others. To be effective, our interactions with others must always reflect our true selves.
2. *Honesty*. A Mental Health Peer Specialist's willingness to be honest and straightforward about their experiences is fundamental to the authenticity which builds trusting relationships with peers.
3. *Mutuality*. In a mutual relationship between two people, no *one* person holds power over the other. In the mental health system, where every other relationship has an imbalance of power between the professional and the person receiving services, peer specialists actively work to minimize the power imbalance between themselves and the people they serve.
4. *Open-Mindedness*. Over time, systems have a tendency to become rigid and prescriptive. A Mental Health Peer Specialist's willingness to look at other ideas, points of view, and ways of doing things are critical components of who we are.
5. *Respect*. A Mental Health Peer Specialist must always have the highest regard for the individuals they serve, which should always be reflected in the language and actions in our work.

In addition, the Mental Health Peer Specialist Advisory Council also adopted the following key concepts that guide the individual and collective work of Mental Health Peer Specialists in Texas:

1. *Hope*. Mental Health Peer Specialists instill hope in others and are living examples that change happens and recovery is real.
2. *Resiliency*. Resiliency and strength are valued and modeled by Mental Health Peer Specialists as they share their lived experience and support others on their recovery journeys.
3. *Self-Determination*. Mental Health Peer Specialists support individuals in their right to decide their own best path to recovery.
4. *Trauma-Informed Approach*. Mental Health Peer Specialists should always work to speak, act, and create environments that support people's healing instead of re-traumatizing people or ignoring their trauma histories.

These core values and key principles serve as guiding principles for Texas MHPs when engaging in peer relationships; they are foundational components to the Via Hope Peer Specialist Certification Training and are woven throughout the Mental Health Peer Specialist Code of Ethics.

Code of Ethics

The principles in the following Code of Ethics guide Texas Mental Health Peer Specialists in their roles, relationships and levels of responsibility in which they function professionally.

1. The primary responsibility of Mental Health Peer Specialists is to help individuals achieve their own needs, wants, and goals. Mental Health Peer Specialists will be guided by the principle of self-determination for all.
2. Mental Health Peer Specialists will maintain high standards of personal conduct. Mental Health Peer Specialists will also conduct themselves in a manner that fosters their own recovery.
3. Mental Health Peer Specialists will openly share their recovery stories, and will likewise be able to identify and describe the supports that promote their recovery.
4. Mental Health Peer Specialists will, at all times, respect the rights and dignity of those they serve.
5. Mental Health Peer Specialists will never intimidate, threaten, harass, use undue influence, physical force or verbal abuse, or make unwarranted promises of benefits to the individuals they serve.
6. Mental Health Peer Specialists will not practice, condone, facilitate or collaborate in any form of discrimination on the basis of ethnicity, race, gender, gender identity, gender expression, sexual orientation, age, religion, national origin, marital status, political belief, mental or physical disability, military status, or any other preference or personal characteristic, condition or state.
7. Mental Health Peer Specialists will advocate for those they serve that they may make their own decisions in all matters when dealing with other professionals.
8. Mental Health Peer Specialists will respect the privacy and confidentiality of those they serve.
9. Mental Health Peer Specialists will advocate for the full integration of individuals into the communities of their choice and will promote the inherent value of these individuals to those

communities. Mental Health Peer Specialists will be directed by the knowledge that all individuals have the right to live in the least restrictive and least intrusive environment.

10. Mental Health Peer Specialists will not enter into dual relationships or commitments that conflict with the interests of those they support.

11. Mental Health Peer Specialists will not engage in sexual/intimate activities with those to whom they are currently providing support, or have worked with in a professional role in the past two years.

12. Mental Health Peer Specialists will not provide services to another when under the influence of alcohol or when impaired by any substance, whether or not it is prescribed.

13. Mental Health Peer Specialists will keep current with emerging knowledge relevant to recovery, and openly share this knowledge with their colleagues.

14. Mental Health Peer Specialists will not accept gifts of significant value from those they serve.

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For more in-depth discussion of Ethics, see National Ethical Guidelines and Practice Standards: National Practice Guidelines for Peer Supporters at: <http://www.williamwhitepapers.com>.

Rules of Conduct

The following Rules of Conduct set forth the minimum standards of conduct which all Via Hope trained Mental Health Peer Specialists (MHPSs) are expected to honor.

Professional Standards

A MHPS shall meet and comply with all terms, conditions, or limitations of the peer professional certification which they hold.

A MHPS shall not perform services outside of their area of training, expertise, competence, or scope of practice.

A MHPS shall not fail to obtain an appropriate consultation or make an appropriate referral when an individual's problem is beyond the area of training, expertise, competence, or scope of practice of the Mental Health Peer Specialist or person seeking peer certification.

A MHPS shall not in any way participate in discrimination on the basis of race, color, sex, sexual orientation, gender identity, age, religion, national origin, socio-economic status, political belief, psychiatric or psychological impairment, physical disability, or the amount of previous therapeutic or treatment occurrences.

A MHPS has a responsibility both to the person receiving services and/or participant(s) and to the organization within which the service is performed to maintain a high standard of ethical conduct.

The MHPS shall not discontinue peer support services to an individual nor shall the MHPS abandon the individual without facilitating an appropriate therapeutic closure of professional services for the individual.

A MHPS shall not reveal confidential information obtained as the result of a professional relationship, without the prior written consent from the recipient of services, except as authorized or required by law.

Sexual Misconduct

A MHPS shall not engage in any form of sexual contact/behavior with persons served. The prohibition shall apply with respect to any service user of the agency by which the MHPS is employed, regardless of whether or not the MHPS is providing peer support to the person. For the purposes of determining the existence of sexual misconduct, the MHPS-peer relationship, once established, is deemed to continue for a minimum of 2 years after the termination of services or the date of the last professional contact with the peer.

A MHPS shall not engage in sexual misconduct with any immediate family member or guardian of a person receiving services during the period of time services are being rendered to the person, during the entire MHPS-peer relationship.

A MHPS shall not engage a supervisee in sexual misconduct during the period a supervisory relationship exists.

Fraud Related Conduct

A MHPS shall not:

- Use misrepresentation in the preparation of an application for Mental Health Peer Specialist certification or in the procurement of certification or recertification as a Mental Health Peer Specialist, or assist another in the preparation of an application for certification or in the procurement of registration, certification or re-certification through misrepresentation. The term "misrepresentation" includes but is not limited to the misrepresentation of professional qualifications, certification, accreditation, affiliations, employment experience, educational experience, the plagiarism of application and recertification materials, or the falsification of reference.
- Use a title designation, credential or license, firm name, letterhead, publication, term, title, or document which states or implies an ability, relationship, or qualification that does not exist.
- Practice under a false name or under a name other than the name under which their certification is held (unless the name has been legally changed such as through marriage or divorce).
- Sign or issue in the professional capacity a document or a statement that the MHPS knows or should have known to contain a false or misleading statement.
- Produce, publish, create, or partake in the creation of any false, fraudulent, deceptive or misleading advertisement.
- Develop, implement, or maintain exploitative relationships with current or past service recipients.
- Misappropriate property from a service recipient.
- Enter into a relationship with a person receiving services which involves financial gain to the Mental Health Peer Specialist or person seeking peer certification or a third party resulting from the promotion or the sale of services unrelated to treatment or the therapeutic relationship.

- Promote to a person receiving services for personal gain any unnecessary, ineffective or unsafe psychoactive substance, or any unnecessary, ineffective or unsafe device, treatment, procedure, product or service.
- Solicit gifts or favors from persons receiving services.
- Offer, give, or receive commissions, rebates, or any other forms of remuneration for a referral.

Safety and Welfare

MHPSs have what is referred to as a “Duty to Warn.” In circumstances where the MHPS becomes aware, during the course of providing or supervising professional services, that a condition of clear and imminent danger exists that a person receiving services may inflict serious bodily harm on *another person or persons*, the MHPS shall, consistent with federal and state regulations concerning the confidentiality of medical records, take reasonable steps to warn any likely victims of the person's behavior.

In circumstances where the Mental Health Peer Specialist becomes aware, during the course of providing or supervising professional services, that a condition of clear and imminent danger exists that a person receiving services may inflict serious bodily harm to *themselves*, the Mental Health Peer Specialist shall, consistent with federal and state regulations concerning the confidentiality of medical records, take reasonable steps to protect that person.

Records Management

A MHPS shall not falsify, amend, knowingly make incorrect entries, or fail to make timely essential entries into the service user's record.

A MHPS shall follow all federal and state regulations regarding service user records.

Assisting Unlicensed Practice

A MHPS shall not refer an individual to a person that the MHPS knows or should know is not qualified by training, experience, certification, or license to perform the delegated professional responsibility.

COMPLAINTS AND SANCTIONS

If an individual believes that a MHPS has violated the Code of Ethics or the Rules of Conduct, they should notify the MHPS's employer and file a complaint with the appropriate certifying body.

ADDITIONAL QUESTIONS OR COMMENTS

If you have additional questions or comments relating to any information contained in the Via Hope Mental Health Peer Specialist Training Manual, please contact Via Hope at info@viahope.org or by phone at 512-953-8160 or 844-300-2196.