

Appendix A
NC Peer Support Specialist Certification
Course Submission and Evaluation Guidelines

This course submission evaluation document is designed to support the assessment of the North Carolina Certified Peer Support Specialist (NC CPSS) Instructor’s training materials presented to the Behavioral Health Springboard (BHS) and North Carolina Division of Mental Health Developmental Disabilities and Substance Abuse Services (NC DMH/DD/SAS) for review. The course provider is required to show that their training focuses on the skills and knowledge required of PSS as established by a January 2007 role delineation study. Only graduates of training programs of a course currently approved through this process are eligible to apply for certification as a PSS by NC DMH/DD/SAS. The course standards are rigorous and reflective of the most current evidence-based practices. The PSS course evaluation materials are firm but not unyielding; they will be modified in future years to reflect new research and scholarship. The PSS course review process assesses whether the Instructor’s Manual:

- a) Addresses ALL the core concepts and identifies where in the Instructor’s Manual each core competency is taught;
- b) Provides specifics as to what will be taught to meet the core competency; and
- c) Provides other necessary teaching materials. ALL competencies must be identified in the Instructor’s Manual.

The choice of which teaching methods will be used in the course are not being evaluated. Different situations require different methods, and course providers will have different models of how people learn and how to teach the required content. However, we are evaluating that there are teaching method(s) specified.

How to Use this Document

This evaluation document is designed to help the evaluator of the Instructor’s Manual to establish whether the developers of the training program have identified and met the core content established for the NC PSS training programs.

For Course Providers

Course providers are required to use this document to specify by page and paragraph:

- The precise locations of all training materials (i.e., including all PowerPoint slides, handouts) where a particular core concept is taught
- The specifics of how each core competency is to be taught (teaching methods)
- If the core concept states to “demonstrate” then the reviewers will be assessing whether the course includes exercises in which participants practice in a role play, or if interactive activities are evident in the teaching methods
- Developers please note the importance of including information and instructions on the concept of wellness versus illness identity as delineated in multiple core concepts

- Please note that 010000 addresses the PSS's personal wellness and not the wellness of the person being served
- Only information specified will be considered by evaluators in the review
- Course Review team will get back to the course provider within 30 days of receipt of course.

The core concepts are described under nine broad headings and are not listed in any order, that is, there is no expectation that core concept 010100 to be taught before 010200.

Course providers must also complete page 3, The Submission Checklist.

For Evaluators:

For each core concept, evaluators assess whether there is sufficient evidence in the Instructor's Manual being reviewed that meets the standard for each core concept by:

- a) Providing sufficient materials to teach each core competency;
- b) Includes instructions to the trainer on how to teach each core concept (teaching methods).

Each course is reviewed by a team of three evaluators, two primary and an administrator. If there is uncertainty about whether a core standard has been met, or a disagreement between the primary evaluators, the administrative evaluator will assist in resolving any difference(s).

While content standards are provided in a manner to enable a wide variety of courses to be developed to meet situational needs, for a course to be successfully certified, ALL core content standards must be addressed within the Instructor's Manual.

All core content standards require specification of the teaching method(s) to be used, but there is no single teaching method defined as appropriate.

Each evaluator must also complete page 4, the *Summary Evaluation page*.

All forms must have the completed information including submission checklist before course will be submitted for review.

**All forms requesting information must be completed at course submission
Submission Checklist**

Training Program Name _____

Length of Program _____

Course Developer _____

Address: _____

State: _____ Zip Code: _____

Contact Name: _____

Phone: _____

E-mail: _____

Date Submitted: _____

Signature of Contact: _____

The course developer must provide 3 hard/paper copies (in 3 ring binders) of the Instructor's Manual and additional materials (PowerPoints slide presentation and addendum) and one electronic copy of all documents listed below in MS Word, PowerPoint, or compatible file types.

Item to Submit	3 Hard Copies	1 Electronic
Instructor's Manual		
Submission Document		
Training materials		
Handouts		
DVD, video, audio		
Training of Trainers (TOT) Manual		

The electronic copy of your course materials can be emailed to the NCCPSS Program at pssregistry@unc.edu

Summary Evaluation

Evaluation Date: _____

Evaluators Name:

Signatures:

_____	_____
_____	_____
_____	_____

How would you (the evaluator) rate this course?

Approved	Needs Modification
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If you (the evaluator) did not approve the course, did you provide evidence as to what parts need modification?

Yes

No

Evaluator Summary Comments: For courses needing modification, please provide a summary of the areas that need modification or why you did not approve the course.

Example Page: Only complete Columns 3 and 5

Domain X	How to submit a course using the matrix					
	Core Concept	<u>Course Developer:</u> Where in the course is this core concept addressed? (Page and Paragraph)	<u>Course Reviewer:</u> Does the content teach the core concept? (Y/N)	<u>Course Developer:</u> Where in the course is the Teaching method(s) specified? (Page and Paragraph)	<u>Course Reviewer:</u> Does the Teaching Method teach the cited content? (Y/N)	<u>Course Reviewer:</u> Comments
XA	Example 1	Page 1, 2 nd – 4 th Paragraphs Page 215 -217 starting at paragraph 4 on 215 and ending at paragraph 1 on page 217. Slide 26, handout 5,		Chapter 1 page 1 (Entire page)		
XB	Example 2	Page 13, # 2 & 3 Page 20, bullet point 15. Page 32 # 4. Handout # 5 page 263		Page 13, A, B, & E. Page 20, A & B Page 32, See trainer instructions on page 32 which include handout # 5 and page 263		

This course review document is to assess whether the training course clearly illustrates how PSS will be taught. Please check pages one and two to see how a course provider or evaluator should use this document.

Domain: 1	Commitment to Personal Recovery: PSS demonstrate a commitment to <i>their own personal recovery</i> by showing that they:					
	Core Concept	Course Developer: Where in the course is this core concept addressed? (Page and Paragraph)	Course Reviewer: Does the content teach the core concept? (Y/N)	Course Developer: Where in the course is the Teaching method(s) specified? (Page and Paragraph)	Course Reviewer: Does the Teaching Method teach the cited content? (Y/N)	Course Reviewer: Comments
1A	Understand the concepts of personal wellness and how these concepts apply to the PSS.					
1B	Understand the reasons for, and methods used, to self-monitor their own wellness.					
1C	Can define and demonstrate how to communicate (written, verbal, etc.) to the right people (e.g., supervisor, sponsor, etc.) when issues of personal wellness interfere with the PSS’s ability to do their job.					
1D	Can define and use person-first recovery language at all times to support personal recovery and empowerment .					
1E	Can show an understanding of how the PSS’s personal wellness impacts agency standing in the community.					
1F	Know the effect of their personal limits on their own wellness, and how to maintain their personal wellness.					

Domain: 2	Relationship Building: PSS demonstrate an understanding of the concepts necessary to develop and maintain healthy relationships with the people they serve, within the agency they work in, other agencies, and their community, by showing that they:					
	Core Concept	Course Developer: Where in the course is this core concept addressed? (Page and Paragraph)	Course Reviewer: Does the content teach the core concept? (Y/N)	Course Developer: Where in the course is the Teaching method(s) specified? (Page and Paragraph)	Course Reviewer: Does the Teaching Method teach the cited content? (Y/N)	Course Reviewer: Comments
2A	Understands how to develop and maintain trust and the importance of being trustworthy.					
2B	Understands the possible consequences of the impact of failure to maintain trust.					
2C	Understand and can demonstrate the ability to listen empathetically without judgment and accept the individual as he or she is right now.					
2D	Understand and can demonstrate the importance of clear verbal and nonverbal communication skills and how different situations may require different communication skills.					
2E	Understand and can demonstrate the process of active listening , especially the use of open-ended questions.					
2F	Support the development and maintenance of community-wide regard for individuals					

	served, and PSS can define and use <u>person-first recovery-oriented</u> language at all times.					
2G	Understand and can demonstrate the importance of developing and maintaining <u>mutual respect and genuineness</u> in building personal connections.					
2H	Understand and can demonstrate the importance of developing and maintaining <u>unconditional positive regard</u> in building personal connections.					
2I	Understands <u>when</u> and <u>how</u> to share their personal experience and when to listen to offer hope and acceptance.					
2J	Understands the importance of <u>sitting comfortably with silence</u> to offer hope and acceptance in recovery.					
2K	Understands the importance of being able to practice <u>unconditional positive regard</u> at all times.					
2L	Can communicate with the person served, coworkers, community members, etc., the importance and creation of a <u>wellness identity</u> , by stripping away the old “ <u>illness identity</u> ” through <u>open sharing and challenging viewpoints</u> .					
2M	Can define and communicate <u>alternatives</u> to prevent hospitalization and to support individuals served in the community whenever possible.					

2N	Can promote a recovery environment in the community, including home and the workplace.					
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Domain: 3	Peer Support Interaction: PSS demonstrate an understanding of the concepts necessary to support the people they serve by showing that they:					
	Core Concept	<u>Course Developer:</u> Where in the course is this core concept addressed? (Page and Paragraph)	<u>Course Reviewer:</u> Does the content teach the core concept? (Y/N)	<u>Course Developer:</u> Where in the course is the Teaching method(s) specified? (Page and Paragraph)	<u>Course Reviewer:</u> Does the Teaching Method teach the cited content? (Y/N)	<u>Course Reviewer:</u> Comments
3A	Can define and demonstrate outreach and engagement skills with individuals served, being aware of issues such as gender, culture, etc., to begin building a professional peer relationship.					
3B	Can demonstrate skills to support the individual served to develop a wellness identity to support the person's goals and dreams.					
3C	Understand their role as a PSS and the role of others in accordance with a variety of plans to support the individual served during a crisis.					
3D	Can define, model, and mentor recovery values, attitudes, beliefs, and personal actions to encourage wellness and resilience for the person's served.					

3E	Can explore with the person's served, the importance and creation of a wellness identity full of potential and possible futures by stripping away the old "illness identity" through open sharing and challenging viewpoints .					
3F	Can promote an individual's opportunity for personal growth by identifying teachable moments for building relationship skills to empower the individual and enhance personal responsibility.					
3G	Understand, model, and share, a variety of decision-making tools to encourage a person's ability to make informed choices.					
3H	Can assist the person's served to re-establish themselves as a valued member of the community by providing examples of healthy social interactions and facilitating familiarity with and connection to the local community.					
3I	Understand and explore with the person served how to navigate reentry from long-term hospitalization, incarceration, or other congregate living situations that have left the peer with few or no natural supports or connections in the community (Daily Living Skills or other independence deficits, issues with guardianship, housing or employment challenges, etc.)					

3J	Can discuss what is and is not peer support and how it is different from other therapeutic professional relationships, with person's served, team members, and the wider community.					
3K	Can define the term "mutuality" and understand the importance of maintaining mutuality in their relationship with peers served.					
3L	Can provide examples of how mutuality in a peer relationship can prevent or dispel power differentials and allow the opportunity to enhance the peer relationship.					
3M	Understand the importance of discussing, documenting, and continuously defining obligations around "safety" and "support" with the person served.					
3N	Understand the importance of discussing, documenting, and continuously defining what constitutes support with the person served.					
3O	Can build and preserve the professional peer relationship by exploring what has worked and not worked in the past to identify effective peer support interactions.					
3P	Understand the importance of the PSS being present with the person, including the ability to sit with discomfort and staying in their role as a peer when confronted with a person's ability to feel safe.					

3Q	Can recognize and appropriately respond to emergencies to include physical and behavioral health crisis.					
3R	Understand the importance of being knowledgeable and following an employer's emergency response procedure.					
3S	Understand the importance of PSS working and behaving in ways that make them appear competent, reliable, and respectful (professional).					

Domain: 4	Systems Competencies: PSS demonstrate an understanding of the concepts necessary to support the people they serve and the agency they work in, by showing they:					
	Core Concept	<u>Course Developer:</u> Where in the course is this core concept addressed? (Page and Paragraph)	<u>Course Reviewer:</u> Does the content teach the core concept? (Y/N)	<u>Course Developer:</u> Where in the course is the Teaching method(s) specified? (Page and Paragraph)	<u>Course Reviewer:</u> Does the Teaching Method teach the cited content? (Y/N)	<u>Course Reviewer:</u> Comments
4A	Have a basic knowledge of the history, including N.C. history, of the Mental Health and Substance Use Disorder Consumer/ Survivor Movement and its relationship to social justice to include, at a minimum: Civil Rights Movement; Olmstead Decision; Americans with Disabilities Act; Rehabilitation Act of 1973; Deinstitutionalization; MH Parity and Addiction Equity Act; history of peer support; NC Department Of Justice settlement 2012; Eugenics/Sterilization; The Vermont longitudinal study of persons with mental illness.					
4B	Support the individual in navigating systems (medical, social services, legal, etc.) through activities such as: accompanying him or her; coaching on court protocol; promoting timely appearance, proper dress, behavior, and speech for each unique setting.					

4C	Understand the process of working with their team/co-workers/ supervisor, to provide support to individuals who show a need to be referred to other resources and services.					
4D	Understand the importance of being able to support each individual in accessing community resources by facilitating familiarity and connection to the local community to achieve desired integration .					
4E	Can promote self-advocacy by facilitating each individual's education about his or her human and legal rights.					
4F	Understand the importance of empowering an individual by supporting the person to exercise their human and legal rights.					
4G	Understand the importance of job responsibilities defined within an agency.					
4H	Understand the reasons for adhering to agency policy, procedures, and code of conduct.					
4I	Can provide complete, accurate, and timely documentation in recovery-oriented language for all services provided in a manner that is consistent with agency, state, and federal requirements in order to obtain compensation, maintain medical records, and demonstrate quality of care.					

4J	Understand the critical importance of maintaining, securing, and keeping confidential personal medical information and records in adherence to federal, state, and local laws, rules, and regulations (HIPAA, CFR 43).					
4K	Can report pertinent observations and events in accordance with their role as a PSS and agency/team requirements, to improve service delivery and to help the individual achieve their goals.					

Domain: 5	Ethics and Boundaries: PSS demonstrate application of the <i>North Carolina Certified Peer Support Specialist Code of Ethics</i> in everyday activities by showing that they:					
	Core Concept	<u>Course Developer:</u> Where in the course is this core concept addressed? (Page and Paragraph)	<u>Course Reviewer:</u> Does the content teach the core concept? (Y/N)	<u>Course Developer:</u> Where in the course is the Teaching method(s) specified? (Page and Paragraph)	<u>Course Reviewer:</u> Does the Teaching Method teach the cited content? (Y/N)	<u>Course Reviewer:</u> Comments
5A	Understand legal responsibilities around mandatory reporting around abuse and neglect of children, adults with disabilities and older adults, etc.).					
5B	Understand and can apply ethical decision-making around boundaries or limits of the PSS relationship with others (i.e. colleagues, parents and family members, people served, etc.)					
5C	Understand and can apply NC PSS code of ethics to decision making and boundaries and limits of PSS relationship with others					
5D	Understand their role in supporting the choices of persons served i.e. PSS are not acting cohesively					

Domain: 6	Substance Use Disorders: PSS demonstrate an understanding of the concept of addiction as a disease vs. moral failure by showing that they:					
	Core Concept	<u>Course Developer:</u> Where in the course is this core concept addressed? (Page and Paragraph)	<u>Course Reviewer:</u> Does the content teach the core concept? (Y/N)	<u>Course Developer:</u> Where in the course is the Teaching method(s) specified? (Page and Paragraph)	<u>Course Reviewer:</u> Does the Teaching Method teach the cited content? (Y/N)	<u>Course Reviewer:</u> Comments
6A	Accept that there are many paths to recovery and can identify examples.					
6B	Understand return to use (formerly referred to as “relapse”) can be a component of recovery and may be a stage in the change process.					
6C	Can assist in planning for prevention of return to use and a renewed commitment to wellness.					
6D	Understand the importance of reassuring the person served of their ongoing commitment to support him/her non-judgmentally if “return to use” occurs.					
6E	Have knowledge of the prevalence of co-occurring substance use disorders and mental health challenges.					

Domain: 7	Trauma-Informed Practice: PSS demonstrate an appreciation for the role and influence of trauma on behavioral health by showing that they:					
	Core Concept	<u>Course Developer:</u> Where in the course is this core concept addressed? (Page and Paragraph)	<u>Course Reviewer:</u> Does the content teach the core concept? (Y/N)	<u>Course Developer:</u> Where in the course is the Teaching method(s) specified? (Page and Paragraph)	<u>Course Reviewer:</u> Does the Teaching Method teach the cited content? (Y/N)	<u>Course Reviewer:</u> Comments
7A	Can define trauma and identify possible sources of, and coping mechanisms associated with trauma (e.g. fight, flight, or freeze).					
7B	Understand that people react differently to the same trauma.					
7C	Can recognize short- and long-term effects of trauma (e.g. Adverse Childhood Experiences Study findings).					
7D	Understand that there are different pathways to recovery and building resilience.					
7E	Understand and discuss strategies to guard against secondary (vicarious) trauma and compassion fatigue					
7F	Understand that trauma and healing can be affected by cultural differences including race and ethnicity, gender identity, sexual orientation , age, language, and family history.					
7G	Understand and discuss how experiences within various systems may have traumatized					

	the person served, (e.g. experiences within the Substance Use or Mental Health Treatment systems of care. Experiences with law enforcement and/or the judicial system)					
7H	<p>Understand the following six guiding principles of trauma informed care as developed by the CDC and SAMHSA</p> <ul style="list-style-type: none"> • Safety • Trustworthiness & transparency. • Peer support. • Collaboration & mutuality. • Empowerment & choice. • Cultural, historical & gender issues 					
7I	Understand the prevalence of Traumatic Brain Injury, Acute Trauma and Post-Traumatic Stress Disorder and their impacts on mental health challenges and substance use disorders.					
7J	Understand how Traumatic Brain Injury, Acute Trauma and Post-Traumatic Stress Disorder impacts mental health challenges and substance use disorders.					

Domain: 8	In Support of Service Members and Families: PSS demonstrate an understanding of the military as a unique culture with different subcultures by showing that they:					
	Core Concept	<u>Course Developer:</u> Where in the course is this core concept addressed? (Page and Paragraph)	<u>Course Reviewer:</u> Does the content teach the core concept? (Y/N)	<u>Course Developer:</u> Where in the course is the Teaching method(s) specified? (Page and Paragraph)	<u>Course Reviewer:</u> Does the Teaching Method teach the cited content? (Y/N)	<u>Course Reviewer:</u> Comments
8A	Recognize and can address the stigma associated with having behavioral health challenges in the military.					
8B	Understand how to navigate resources available specifically for military members and their families.					

Domain: 9	Cultural Competence/Awareness: PSS demonstrate a respect for cultural differences and can cultivate successful approaches to diversity by showing that they:					
	Core Concept	<u>Course Developer:</u> Where in the course is this core concept addressed? (Page and Paragraph)	<u>Course Reviewer:</u> Does the content teach the core concept? (Y/N)	<u>Course Developer:</u> Where in the course is the Teaching method(s) specified? (Page and Paragraph)	<u>Course Reviewer:</u> Does the Teaching Method teach the cited content? (Y/N)	<u>Course Reviewer:</u> Comments
9A	Understand the need to continue to improve the person's awareness of self and their value systems.					
9B	Have knowledge of strategies to recognize and address one's own implicit bias.					
9C	Understand unstated institutional cultural norms in workplaces, communities, and society, and how those norms lead to inequities.					
9D	Maintain a working knowledge of the history, culture, beliefs, values and needs of diverse individuals and communities.					