

Peer Specialist Documentation Guide

Created by the Eastern Massachusetts Peer Network

Introduction

Often Peer Specialists are asked to write documentation which violates the Certified Peer Specialist Code of Ethics and interferes with effective Peer Support. Peer Specialists then must decide whether to risk their livelihood or compromise their values. This document contains strategies for approaching these difficult situations.

Values

The Certified Peer Specialist Training is clear: Peer Specialists do not write service notes or other documentation about the people they support. It violates the Certified Peer Specialist Code of Ethics, particularly items regarding confidentiality, self-determination, and mutuality.

When Peer Specialists provide information to other staff, through notes or otherwise, it undermines trust. If a person receiving support knows their conversations will be shared, they are unlikely to feel safe discussing sensitive topics. Violating confidentiality also risks prompting a clinical or medical power-over response, such as involuntary hospitalization.

Service notes are provider-driven, not person-driven, which means they conflict with our value of self-determination. Documentation also interferes with mutuality by creating an inherent asymmetry in the relationship.

Education

Peer Support is a unique, emerging service that agencies often are still learning. Sometimes, providers are simply unaware of the features of the Peer Specialist role. If an employer is requesting that Peer Specialists write service notes or other documentation, it might be enough to inform them that Peer Specialists do not write documentation.

Employers might want to know why Peer Specialists do not write documentation. In such cases you can explain the positive value of Peer Support and how documentation interferes with the mutual peer relationship. A personal story of how documentation or violations of confidentiality undermined support you received can illustrate the harms of documentation. You can point out that Peer Support is non-clinical and that Peer Specialists receive no training in writing clinical service notes.

Documents that define the Peer Specialist role might also help employers understand, such as:

- [Certified Peer Specialist Code of Ethics](#)
- Certified Peer Specialist Training Standards on Documentation
- [International Association of Peer Supporters Practice Guidelines](#)
- Eastern Massachusetts Peer Network Peer Support Fidelity Tool
- [Western Massachusetts Recovery Learning Community Declaration of Peer Roles](#)

For Peer Specialists working in Adult Community Clinical Services (ACCS), your employer will likely want to be aware the ACCS contract specification (the Request for Response, or RFR) states that “Documentation completed by a Certified Peer Specialist is to be done in accordance with CPS training standards.” Given the CPS training standards state Peer Specialists do not write notes, doing so would constitute a violation of their contract.

Understanding

If an employer continues to insist that Peer Specialists write notes, it might be helpful to know their reasons for doing so. Asking “Why?” can lead to understanding the employer’s purpose for requiring notes, and creates space for addressing the concerns with additional information or work-arounds that address everyone’s needs.

For example, occasionally employers have expressed concern over how they are going to monitor the Peer Specialist’s work. In this case, some Peer Specialists have found that identifying this challenge as a personnel matter, rather than a treatment issue, shows that traditional service notes are not the appropriate way to address the concern. Some Peer Specialists write notes that are introspective, reflecting on their own work, team dynamics, their organization, and/or the mental health care system as a whole. This format allows Peer Specialists to demonstrate the work they do without compromising the support they provide.

Systems Change

The Eastern Massachusetts Peer Network (EMPN) is working hard to ensure that every Peer Specialist can provide high integrity Peer Support without fearing retaliation from their employer.

For example, EMPN and many others across the state engaged with the Massachusetts Department of Mental Health (DMH) during the contracting process of ACCS by advocating for protections regarding the Certified Peer Specialist Code of Ethics. Now that ACCS is launched, EMPN is working with providers to educate them on these standards and with DMH to ensure that they are enforced.

Our hope is that one day all Peer Specialists, regardless of service, will be fully supported in providing the most effective Peer Support possible. To find out more about what we’re working on and how you can help, contact EMPN through our website: <https://empnetwork.org/> .

Harm Reduction

While working on systems change, there are many things you can do if an employer will not budge on documentation. As discussed in the CPS Training Standards on Documentation and the Values section of this document, our principles inform us on why documentation is harmful. Keeping these values in mind can help guide you to minimize the harms of documentation should you be in a role that requires it.

For instance, given our value of confidentiality, you might be able to identify ways you can write a note while trying to maximize confidentiality. Strive to include only the minimum amount of information required by your employer. It might be helpful to request organizational policy on what is absolutely necessary. Your employer may be satisfied with a note that simply says, “I provided Peer Support to Sam Jones on August 10, 2018.” Offering this as a temporary compromise can anchor the discussion and places the obligation on your employer to show exactly what additional information they require.

Given that we value self-determination, we might ask the person we are supporting if they want a note written about them. Their response can be used to further educate your employer. It might demonstrate how notes are provider-driven, not person-driven. You can also explain that it is an opportunity to empower the person receiving the service by respecting their wishes.

If the employer still requires documentation, you can be transparent about this policy with the people you support. This presents them with an opportunity to provide ideas on how to reconcile your restrictions with their preferences, and also identifies the source of the decision. You can attempt to empower the person by asking what the person wants included in their chart. Offering concurrent documentation is a good way to promote transparency. Always seek to keep the person’s self-determination at the forefront and be careful not to push an obligation that has been assigned to you onto them. If you find yourself documenting, use human experience language whenever possible. Avoid judgmental, blaming, or labeling language.

Periodically check in with your employer regarding your documentation. See if documentation is meeting its stated purpose. As an example, if your employer states that your documentation is there to inform other team members, you might ask for examples of anyone reading your notes and how that improved the service you provide.

Support

For Peer Specialists that are required to write documentation, you are not alone. Some Peer Specialists are in similar circumstances, and many have been there. Peers at your organization or EMPN can provide support as you navigate these challenges.