

## GUIDELINES

### Peer Support Worker Documentation

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*These Guidelines highlight the unique pieces of Peer Work roles must consider for documentation. Each Organization will still need to reference their own Policies and Procedures to ensure safe practices. However, as a peer work champion in your organization you can support any necessary changes to promote an equitable work environment.*

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*Peer Workers “either (gather) minimal information about interactions with peers or keep notes in a collaborative, empowering and transparent manner” Scott. A 2012*

1. **TRUST-** Ensure the Person Engaging in Services (PES) is fully informed about documentation, including, boundaries of confidentiality, what information is gathered and for what purpose, and what their rights are. Provide room for dialogue and questions. Ensure they are able to provide informed consent on what will be documented about their care. These conversations are not one time. Be open to discussing this whenever it may be needed.
2. **SELF-DETERMINATION-** Documentation reflects that the agenda of the meeting is directed by what the individual feels is important on that day. The peer worker can ensure this happens by asking at the beginning “what is it that you would like to get out of today’s meeting together?” and at the end ask “did you get out of today what you wanted?”, “Is there anything you want to make sure we do/or discuss next time?”
3. **EQUAL RELATIONSHIPS-** Peer Worker’s should make every effort to engage in collaborative note taking. This means the notes are created by both peer worker and PES working together to decide what is documented. During the meeting the peer worker will make sure to ask the PES “what is important for us to document about our meeting today?” Ideally, *“Collaborative Documentation is a person driven approach and interactive process that supports recovery oriented services in which documentation of the assessment, goal setting and progress notes is integrated into the delivery of service. The individual is face to face with the provider and engaged in the documentation process by providing input and perspective on their service.” R. Priest 2017.* If documentation is not possible face to face, the PES should feel they know exactly what will be documented by the peer worker about that visit.
4. **INTERGRITY-** A peer worker’s documentation with a PES will be focused around the scope of practice of a peer worker, listed in the Peer Support Service Expectation Statements\*. It will be strengths-based, peer core values based, person-directed, holistic wellness/recovery and capture lived experience perspective.

5. RESPECT- If there is something the PES shares that the peer worker must disclose, the peer worker will be honest with the PES about their workplace policy/ procedures/legal obligations and work with them to share the information together with the appropriate people. PES should be fully informed of how information is shared amongst the team, so that they can decide how much is shared with any one member. Ongoing discussion amongst teams around different situations are advised to figure out how best to negotiate peer work values into unique circumstances as they arise.
6. SHORT AND CONCISE- Specifics that can be documented:
  - Date Service Provided
  - Location of Service (phone, location/city)
  - Collaboratively Documented (yes or no)
  - Service Provided (group, one to one)
  - Purpose of Service (what did the person want to get out of the meeting)
  - Approach Utilized (Which values in action approaches did the peer worker use- see expectation statements below\*)
  - Individuals Response to Service (Did the person find the meeting met their needs)
  - Plans for Follow Up

## \*PEER SUPPORT SERVICES EXPECTATION STATEMENTS:

**Core Values of Peer Work** (Hope, Recovery, Empathetic, Equal Relationships, Integrity, Authenticity, Trust, Lifelong learning, Personal growth, Self-determination, Dignity, Respect, Social Inclusion, Health and Wellness) *MHCC*

### Peer support worker is expected:

1. To remind the person that their health and wellness is unique to them.
2. To share their personal experiences when it may be helpful.
3. To give encouragement.
4. To share about community resources and different learning opportunities that are available.
5. To explore options open to the person when they have a decision to make.
6. To not express disapproval of the person or the choices they make.
7. To believe in the person.
8. To recognize their feelings and opinions as valid/worthwhile.
9. To genuinely listen.
10. To honour commitments they make to the person.
11. To discuss confidentiality whenever needed.
12. To express that the person is not alone in their experiences and struggles.
13. To encourage the individual to advocate for them self.
14. To learn from the person.
15. To remind the person they have the right to express their needs
16. To demonstrate their personal recovery/wellness and self-care.
17. To encourage people to participate in a way that is comfortable for them and the group, if facilitating a group.

## QUICK GUIDE

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#### PEER WORKER STAFF DOCUMENTATION

\*Always reference your organizations policies and procedures to ensure safe practices

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#### Face to Face time

1. Discuss the organizations policies and procedures around documentation and confidentiality.
2. Ensure they understand how and what you will document from your time together and when you may need to share information and how you will handle that situation. Have these discussion whenever needed.
3. Set the meeting agenda together based on their needs. "What is it that you would like to get out of today's meeting together"
4. Ensure they were okay with how your time was spent.  
"Did you get out of today what you wanted?"  
"Is there anything you want to make sure we do/or discuss next time?"
5. Ask "What is important for us to document about today's meeting?"

#### Administration Time

Write notes that are short and concise:

- Date Service Provided
- Location of Service (phone, location/city)
- Collaboratively Documented (yes or no)
- Service Provided (group, one to one)
- Purpose of Service (what did the person want to get out of the meeting)
- Intervention Utilized (What values in action did the peer worker use)
- Individuals Response to Service (Did the person find the meeting met their needs)
- Plans for Follow Up