

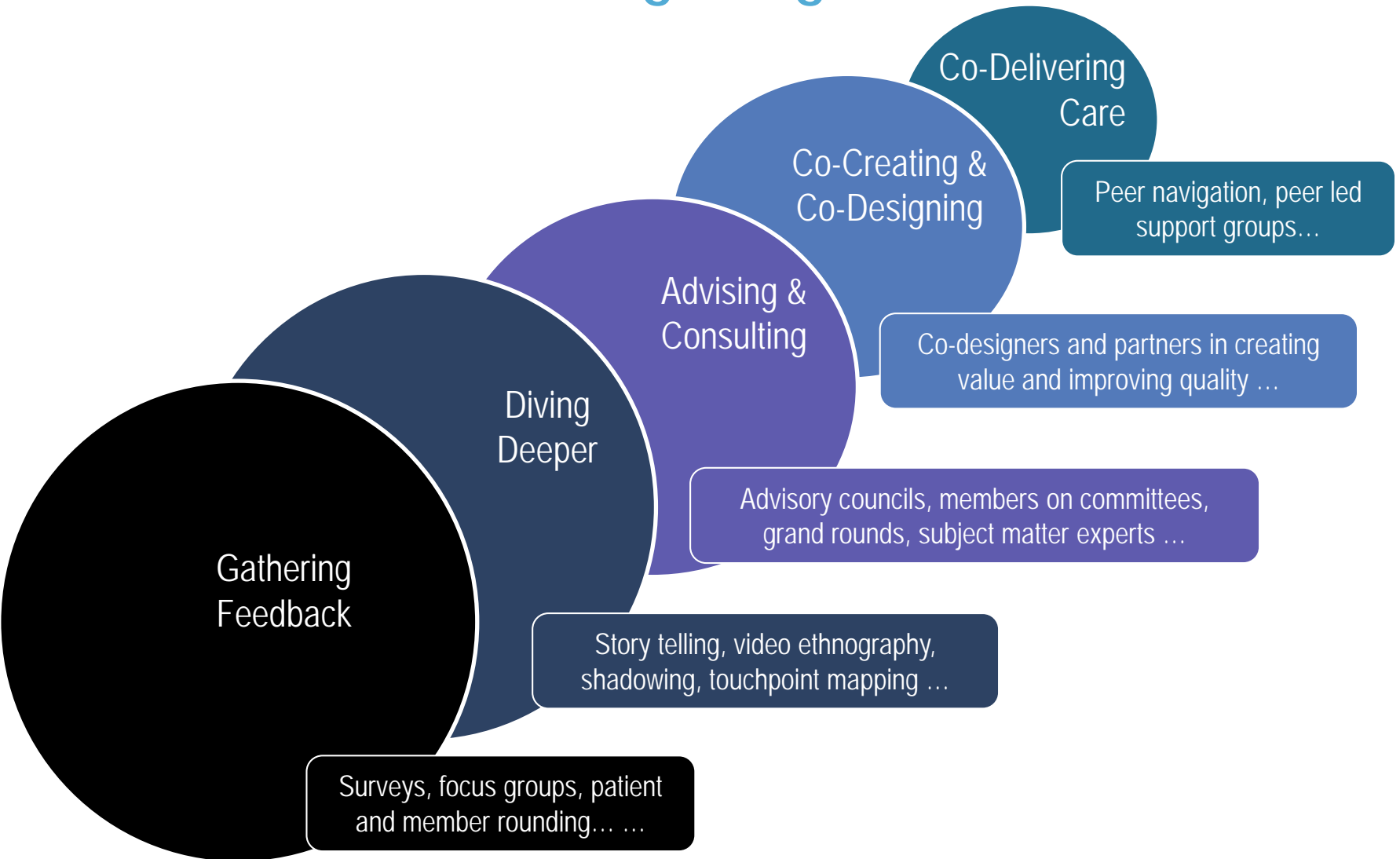
How to Integrate Peer Support & Navigation into Care Delivery

Andrew Bertagnolli, PhD

Why Integrate Peer Support into the Care Delivery Pathway?

Improved health
Increased feelings of empowerment
More satisfaction with healthcare services
Achieving Affordability

KP's Evolution in Integrating Patients and Families



We leverage all these approaches today as we strive to actively listen and partner with our members and their families at every touchpoint in their journey and across all our quality improvement and innovation efforts.

Peer Support & Spread at KP

Emerging industry standard

American Cancer Society, Reach for Recovery

High performing medical centers

Kaiser markets

Kaiser Permanente's Start & Breast Cancer PN Spread:

South Sacramento modeled after UC Davis (Fall '12)

Oakland fall 2013,

Hawaii Jan 2014,

NW mid 2014

Orange County Fall 2014

Kaiser Permanente Other Settings Spread:

Lung Transplant Winter 2014

Other cancer types in current locations

Interest from COPD, Nephrology, Pediatric Development Disabilities,
Brain Injury, Caregivers, Postpartum etc.

Kaiser Permanente / MHA Peer Support Specialist Pilots:

Northwest (Jan 2015)

North Valley Area (Mar 2015)



Types of Peer Support in Healthcare

- 1:1 Support
- Office Hours
- Procedure Specific: Pre Surgery or During Chemotherapy
- Peer Led Support Groups
- Peer Moderated Online Community



Most Common Type of Peer Support in KP

- **The Peer Navigator**

A trained KP volunteer who is matched with members newly diagnosed with a complex medical condition and wish to work with someone who 'has walked in their shoes.'

Has "lived experience" with the same illness, has survived, and is managing the condition

Provides one-on-one support for members through a variety of ways co-designed with the patient

Emerging Type of Peer Support in KP

▪The Peer Support Specialist

- A person living with a mental health and/or co-occurring condition, who has been trained and certified to help others with these conditions, identify and achieve specific life and recovery goals.
- Actively engaged in his/her own recovery, and volunteers or is hired to provide peer support services to others engaged in mental health treatment.
- Progressed in their own recovery from alcohol or other drug abuse or mental disorder and is willing to self-identify as a peer and work to assist other individuals with chemical dependency or a mental disorder.
- Lived experience and expertise that professional training cannot replicate
- Trained to help others with these conditions, as well as identify and achieve specific life and recovery goals.

Program examples and Case Studies

Example 1: Support Groups (In Person & Virtual)

KP Support Groups



Find doctors & locations My profile Member assistance Español

Sign on | Choose your region

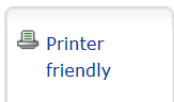
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Support groups

Find the support you need in one of the following ongoing support groups: Anxiety, Panic, Depression, Cancer, Chronic Illness, Chronic Pain, Divorce and Separation, Grief and Bereavement, Job Stress, Seniors, and more. Some groups require an individual appointment in Psychiatry or Behavioral Medicine first.



Support groups

Program type: Therapy and support groups

Who can attend: This program is open to Kaiser | These are the classes offered in the Support Groups program

Referral required: No

- Alzheimer's Support Group for Caregivers
- CHADD: Children and Adults with Attention Deficit Disorder / Attention Deficit Hyperactivity Disorder (ADD/ADHD)
- Diabetes Community Resources
- Hepatitis C Support Group
- Mended Hearts
- Multiple Sclerosis Support Group
- Ash Kickers: Smoking Cessation Aftercare Support Group
- Scleroderma Support Group
- Stroke Education and Support Group
- Prostate education and support group

KP Virtual Communities

KP Oak. Breast Cancer Community Moderated Google Group & Email Listserve

Groups

NEW TOPIC

Mark all as read Actions Filters

Kaiser Breast Cancer Support Group Shared privately
60 of 114 topics (46 unread)

Manage · Members · About

There is [one pending message](#) to review

1 updated topic

Welcome; Forum on reconstruction; Exercise redux; Clinical trials (1)
By Kaiser Breast Cancer Support Group 1 post 0 views updated Apr 12

Welcome; Walks/other events; Taxes=give to fight BC; Molecular genetics, Relay, Wig recom, Taco Tues
By Kaiser Breast Cancer Support Group 1 post 1 view updated Apr 5

PBS-Emperor All Maladies; Exercise & Chemo; Stress Mgmt; Clinical trial ad; Head coverings; A. Jolie
By Kaiser Breast Cancer Support Group 1 post 2 views updated Mar 29

[Kaiser BC Support Group] Digest for Kaiser-BC-Group@googlegroups.com - 1 update in 1 topic

From: "Kaiser-BC-Group@googlegroups.com" <Kaiser-BC-Group@googlegroups.com>

To: "Digest recipients" <Kaiser-BC-Group@googlegroups.com>

To protect your privacy, Yahoo Mail has blocked remote images in this message. [Show Images](#)

Kaiser-BC-Group@googlegroups.com

Google Groups

Topic digest

[View all topics](#)

Welcome; Walks/other events; Taxes=give to fight BC; Molecular genetics, Relay, Wig recom, Taco Tues - 1 Update

[Welcome; Walks/other events; Taxes=give to fight BC; Molecular genetics, Relay, Wig recom, Taco Tues](#)

Kaiser Breast Cancer Support Group <Kaiser-BC-Group@googlegroups.com>: Apr 05 10:44PM -0700

Support group back in regular meeting location, Fabiola G26 on the bottom (ground) floor.

Dear All -

Summary:

I. Our members

a) Welcome new member

II. Upcoming events and programs


b) Walks, runs, and other events

c) Tax time – Give to BC Research

III. *Research/News*

Example External Online Community for KP Members

A external moderated online community that will link to KP.Org in the future.




Smart Patients

Email Password


keep me signed in [Forgot password?](#)

Join the conversation!

If you're not a patient or caregiver, [click here.](#)




Smart Patients is an online community where patients and caregivers learn from each other about treating clinical trials, the latest science, and how it all fits into the context of their experience.



Smart Patients

[preferences](#) | [sign out](#)




dexterjanet

0 | 0

- Breast Cancer
- Conversations
 - my conversations 16
- Tags
 - breast cancer 16
 - browse tags

Conversations



Welcome to our breast cancer community ★
Announcement by Robin M

Welcome to everyone joining our community for breast cancer. If you're new here, this post will help you get off to a good start. Please introduce yourself and your situation.... [continue reading](#)

80 unread replies by Clora Mae, Robin M, [Valerieholman](#), cara0421, MightyCasey and 25 others

tags: ★ breast cancer mark read

Video Tutorial

Find your way around Smart Patients with our video tutorial.

Interested?

Here are some tags you might like to follow. Click on a tag to find out more.

★ lung mets

What is Big White Wall?

A clinically supported, professionally facilitated, self-managed, community of people who provide peer support to one another

Key Features:

- Online mental health wellbeing service
- Guided by trained professionals
- Available 24/7
- Completely anonymous – professionally trained Wall Guides ensure the safety and anonymity of all members.



How Big White Wall is used by Members....



Be Anonymous

Access an anonymous community of support available from members 24/7.



Join Chats

Join Talkabouts with members to share and gain support and advice - in the whole community or form your own groups or one to one chats.



Take Tests

Take tests to help understand more about how one is feeling.

Example 2: Cancer Programs

Navigator Logistics

KP Breast Care Center recommends breast cancer survivors of at least two years.

One Peer Navigator (PN) acts as the Volunteer Coordinator and liaison to the clinic staff.

PN training is provided by Volunteer Services, staff of the clinic & coordinator.

PNs commit to a minimum of 4 hours monthly.

PNs keep a monthly activity log.

PNs attend monthly training/meetings with the Breast Care Center staff.

Participate in other Breast Care Center Activities as available (awareness walks, support group, escorting patients, health fairs, special patient events).

The Breast Care Center Leadership, in conjunction with the PN Volunteer Coordinator evaluate the efficacy of the program.



Peer Navigator Role



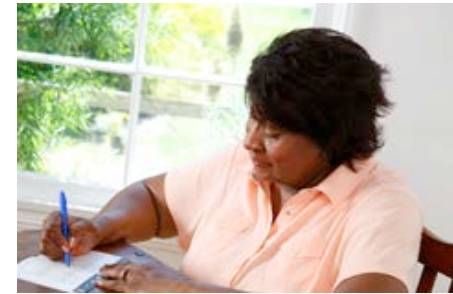
Peer navigators can:

- Provide emotional support
- Help with problem solving
- Assist with accessing community resources (example: Caring Bridge)
- Accompany patients to doctor visits, surgery, chemo, and radiation
- Provide the perspective of experience
- Offer encouragement and hope

Peer navigators cannot:

- Make medical decisions for the member
- Recommend particular physicians, treatments, or medications
- Recommend alternative methodologies, complementary therapies, or supplements
- Drive the patient or family members to and from appointments or other activities
- Conduct home visits

Patient Logistics



KP Breast Care Clinic offers Peer Navigation (PN) services to newly diagnosed patients.

Patient names are given to the PN Volunteer Coordinator for matching.

The patient determines the pace, type and frequency of contact.

PNs may attend appointments, surgery, chemo and radiation sessions upon request.

The PN relationship continues until the end of the patient's active treatment.

If the patient informally ends the relationship by not responding to three contact attempts by the PN, then the PN Volunteer Coordinator sends a post card inviting them to re enter the PN program at any time.

Roles Involved

Clinic Team: launch program, program oversight, offering program to patients

Volunteer Peer Navigator Coordinator: oversee navigators, match patients

Volunteer Services: enroll peers as KP volunteers and train in compliance, etc.

*KP South Sacramento
Memorandum of Understanding
between the Breast Cancer Peer Navigation Program
and the Volunteer Services Department*

The above named departments agree to the following concerning volunteer services for the Kaiser Foundation Hospital, Breast Cancer Peer Navigation Program, South Sacramento Medical Center:

The responsibilities of the Volunteer Services Department include:

1. Supporting the interview process of potential volunteers if Volunteer Liaison so requests.
2. Onboarding qualified candidates to volunteer in the Breast Cancer Peer Navigation Program.
3. Providing the required background check and organizational orientation, to include information on infection control, codes, HIPAA, confidentiality, POR, and safety requirements of all volunteers. Additionally is a review of volunteer specific dress code, parking, benefits and performance standards.
4. Instruction and assistance in acquiring the health appraisal and required lab and injection work.
5. Making arrangements for the photo identification badge.
6. Notifying the Volunteer Liaison when new volunteers are ready to begin their service.
7. Attend Peer Navigator meetings as necessary.
8. Attend quarterly Volunteer Liaison/Volunteer Coordinator rounding meetings.

The responsibilities of the Breast Cancer Peer Navigation Volunteer Liaison include:

1. Drafting the service description and training checklist for volunteers' duties with input from other staff and the manager of the program.
2. Working closely with the Volunteer Coordinator on an ongoing basis to maintain an effective program, including participation in quarterly Volunteer Liaison/Volunteer Coordinator rounding meetings.
3. Facilitating training and that training documents are complete and returned to the Volunteer Coordinator, indicating that potential volunteers are ready to complete the volunteer onboarding process.
4. Coaching and counseling; the day to day supervision of the volunteers takes place in the Breast Cancer Peer Navigation Program with those who have ownership of the tasks being performed.
5. Educating the volunteers of duty/task changes and updating them regularly. Advising other staff and physician that volunteers must stay within the scope of the service description.
6. Maintaining the peer navigation tracking documents, collecting and reviewing weekly activities and submitting hours completed by all volunteers to Volunteer Coordinator on a monthly basis.
7. Providing competency evaluations once in a three-year period as required by the Joint Commission, in coordination with the Volunteer Coordinator.
8. Ensuring that volunteers complete annual TB surveillances and annual compliance trainings.
9. Attending occasional in-service meetings with Volunteer Services staff and/or meetings with volunteers as arranged with the Volunteer Coordinator.
10. Providing recognition for the volunteers; Volunteer Coordinator can assist with ideas. The Volunteer Liaison is invited to annual recognition luncheon held in April each year.

We e

Volunteer Coordinator

Date signed: _____

Volunteer Peer Navigator Coordinator Responsibilities

Referral Process

- Receive referrals from the Breast Care Center Staff
- Match patient with Peer Navigator (PN).
- Keep records of initial patient contact.
- Send postcards to patients who do not respond to PN contacts

Other responsibilities

- Conduct PN meetings
- Compile monthly activity report for Volunteer Services
- Arrange for additional PN training
- Assist in recruiting PNs
- Provide PN volunteers for other Breast Care Center activities

Early Adopter Lessons & Recommendations

Utilize existing resources to avoid creating program from scratch

Pre-planning of integration from end to end imperative

Make sure other departments are on board (surgery, oncology, volunteer services) for referrals and workflow and oversight

Calculate how many navigators you will ultimately need

(annual census x 60% = # patients who would want a navigator / 2 patients per navigator = # of navigators needed)

Have volunteers in place to assist with operations of program (hours/compliance/ keep up on resources)

Consider cultural diversity and accommodating people of all cultures, languages, etc..



Virginia Pier, PT, (far right) consults with Claudia DeYoung, MD, at a recent training for new breast cancer peer navigators.

Example 3: Lung Transplant Program

Organ Transplant Peer to Peer Pilot

Program Overview

- Purpose
 - Emotional support through a Peer-driven connection
 - Increased adherence to medical treatments
 - Decrease in anxiety/depression
- Execution
 - Solicitation of peer mentors
 - Engagement of other stakeholders (Volunteer Services, Compliance, Employee Health)
- Current State
 - 6 month pilot



Organ Transplant Peer to Peer Pilot

Program Status

- 4 Mentors
- Matched to 4 peers
- PHQ-9 monthly
- Satisfaction Surveys
- Mentor debriefing

4 months

Status

Organ Transplant Peer to Peer Pilot

Program Benefits for Patients

- Better coping through the transplant process
- Decreased anxiety and depression
- Improvement in family coping
 - The coping of the patients themselves
 - Patient's interactions with their support system
 - Patient's interactions with the treatment team
- Mentor expertise
 - A well of knowledge and understanding



Example 4: Behavioral Health Pilot

Behavioral Health Peer Specialist Support Pilot

Program Overview

The Peer Specialist Pilot is a feasibility study in partnership with Mental Health America (MHA) wherein the role of a Peer Specialist can be defined and integrated into the care delivery pathway for members with special needs to:

- Promote mind-body recovery and resiliency
- improve the health status
- reduce in appropriate use of healthcare services by this Special Needs Population



Behavioral Health Peer Support Specialist Pilot

Pilot Population

- Medicare members under 65 and dual eligible members with 11 or more Emergency Department visits within 12 months
- Pilot enrollment = 4 members

Pilot Intervention

- Peer Support Specialist Model -- .4 FTE (16 hours/ week)
- In-person, telephonic, individual and/or in group settings
- Core Functions Performed
 - Assistance in daily management
 - Social and emotional support
 - Linkages to clinical care and community resources

Peer Support Specialist Support Pilot

Overall Aim

To conduct a feasibility study in partnership with Mental Health America (MHA) wherein the role of a Peer Support Specialist can be defined and integrated into the care delivery pathway for members with Special Needs to promote mind-body recovery and resiliency, improve the health status, and reduce in appropriate use of healthcare services by this population with special needs.

Pilot Goals

- Increase ability to identify member-specific needs of the population
- Improve member utilization of primary care, preventive services, and outpatient mental health services
- Reduce avoidable ED and acute care utilization
- Improve relationship between members and care teams

Expected Outcomes

- Improved Member Experience and Satisfaction
- Improved member adherence to medical treatment recommendations
- Improve member's ability to self-manage
- Decrease member's missed appointment rates
- Improve member's quality of life
- Reduce unnecessary ED visits and inappropriate use of medical resources
- Improve overall health of the Population

Peer Support Specialist Support Pilot

Pilot Population

Medicare Special Needs Program members with

- High ED utilization and/or frequent readmissions to inpatient psych
- High prevalence of mental health and chemical dependency needs
- Many social barriers

Pilot Intervention

2 FTE Peer Support Specialists

In-person and telephonic visits

Core Functions Performed

Assistance in daily management

Social and emotional support / goal setting

Link to clinical care and community resources



2015 Peer Pilot Accomplishments

- ✓ Better tracking of members following hospital discharge.
- ✓ Better linkage to medical support and care
- ✓ Better coordination of care and linkages to community resources members
- ✓ Members were more inclined to take an active role in their medical care as a result of access to peer support.
- ✓ Members were able to make it to their follow-up appointments following discharge and obtain their medications.



2015 Pilot Wins and Learnings

Wins

Increased team collaboration

Increased transition support from inpatient setting to social environment

Increased connection with the outpatient behavioral health team

Ability to identify and meet members social needs with the appropriate community interventions

Enhanced member trust in the KP system

Ability to address traditional gaps post discharge (e.g. Housing, medication, f/u appointments, etc.)

Enhanced communication and engagement prior to inpatient transition

Lessons Learned

Difficult to engage members during hospitalization

Traditional access to behavioral health care services does not work for members with severe mental illness

The Future of Behavioral Health Peer Support Specialists in Kaiser Permanente

To bring Peer Support Specialists to Scale will need to have:

- Clear articulation of objectives of peer support:
 - Identification of member-centric goals
 - Bridging to community resources
 - Socio-emotional support
- Communication between KP Care Team and Peer Specialist
 - Agreement on what information needs to be shared between the KP Care Team and Peer Support Specialist
 - Timely communication of member health status to KP Care Team
- Agreement on how to gauge 'productivity' of Peer Support Specialist
 - Which member are best 'suited' to have a Peer Support Specialist
 - How many members can a Peer Support Specialist manage per 1 FTE
 - What is the expected length of engagement with Peer Support Specialist