

# Lean On Me

## Peer Recovery Supporter Certification Improvement Project

- Irene Barnett
- Health Plan Policy Administrator
- Green Belt Phase



*Making Ohio Better*

# Team Members

- Irene Barnett - Green Belt Facilitator
- Scott Wingenfeld - Camo Belt Facilitator
- Beth Gersper – LeanOhio Mentor and OHMHAS agency liaison

A graphic featuring a blue watercolor-style splash on the left side. The text "OHMHAS Team Members" is written in white, sans-serif font across the center of the splash. To the right of the splash, a list of team members is displayed in black text.

OHMHAS Team Members

- Angie Bergefurd, Senior Manager
- Jody Lynch – Team Sponsor
- Mindy Vance, Team Lead
- Sharon Fitzpatrick, Process Owner
- Melissa Jackson, Member

2/18/2020

**D**EFINE –

What is the problem?

# Project Charter

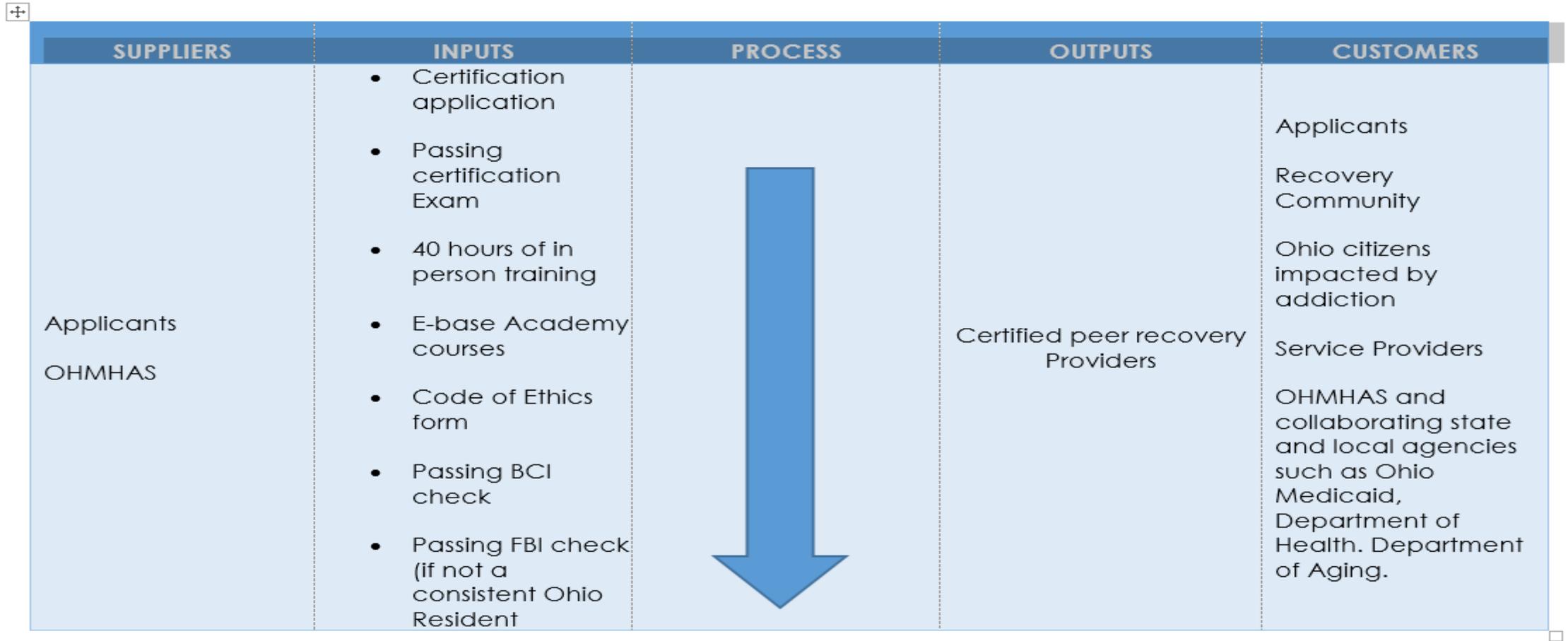


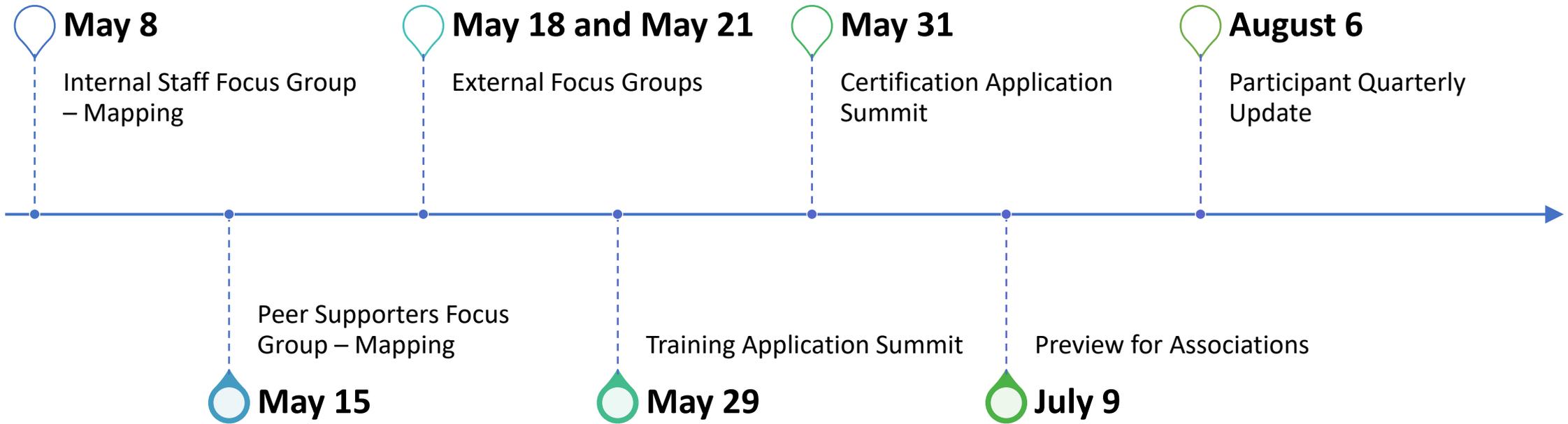
## Project Charter

Project/Event Title	Peer Recovery Support Provider Certification Application Process
Project Facilitator	Irene Barnett
Agency/Organization	OhioMHAS and Ohio Department of Medicaid
Project Mentor	Beth Gersper
Charter Last Updated Date	5/3/2018

<b>Project Background</b>				
Individuals with a lived experience of mental health and/or substance use disorders who are interested in using their story of illness to wellness to inspire hope in others may apply to become a Certified Peer Recovery Supporter. The applicant must complete training and submit several pieces of information for consideration of this credential.				
<b>Problem/Opportunity Statement</b>				
OhioMHAS has received a number of complaints regarding the certification application process. Given the volume of work and level of complaints, day to day operations would benefit from process review and improvement efforts. For example, it is taking months for applicants to become certified and there is currently lots of back and forth communication between the day to day operations team and the applicants.				
SCOPE (define boundaries)	<b>First step in the process:</b>			
	The need to complete a certification application packet.			
SCOPE (define boundaries)	<b>Last step in the process:</b>			
	Successful submission of a certification application packet			
<b>Project Goals</b>				
1.) Reduce certification packet return rate (due to missing pieces or errors) / increase the number of packets successfully submitted the first time				
2.) Reduce the number of days from first step to the last step				
3.) improve communication and reduce the number of inquiries for the process				
<b>Project Boundaries</b>				
Criteria for certification stays the same. No change in rules or statutes.				
<b>Performance Metrics:</b>				
<b>What measures will tell you if you are successful.</b>		<b>Performance Metrics</b>		
Certification time	months	Goal	Final	% Change
number of inquiries	TBD	30 days		
reduction in packet returns (types of errors)	TBD			
<b>Projected Benefits</b>				
Additional Certified Peer Support Recovery Providers and Specialists - increased access to services, decreased length of time for the certification application process resulting in increased efficiency and quality. Improved stakeholder and customer satisfaction.				
<b>Project Team</b>				
Senior Manager:	Angie Bergefurd			
Team Champion/Sponsor:	Jody Lynch			
Team Lead:	Mindy Vance			
Process Owner:	Sharon Fitzpatrick			
Team Members:	Based on input from OACBHA, Ohio Council, NAMI, OCAAR and OhioMHAS staff.			
Subject Matter Experts:	Representatives from OhioMHAS offices such as OIS, Licensure & Certification and Senior staff as needed.			
<b>Project Champion/Sponsor and Team Lead Sign-Off:</b>				
<i>I am committed to supporting this project and implementing the teams improvements.</i>				
Team Sponsor Signature:				
Team Lead Signature:				

SIPOC





# Participant Engagement - Dates

# Voice of the customer and employee:



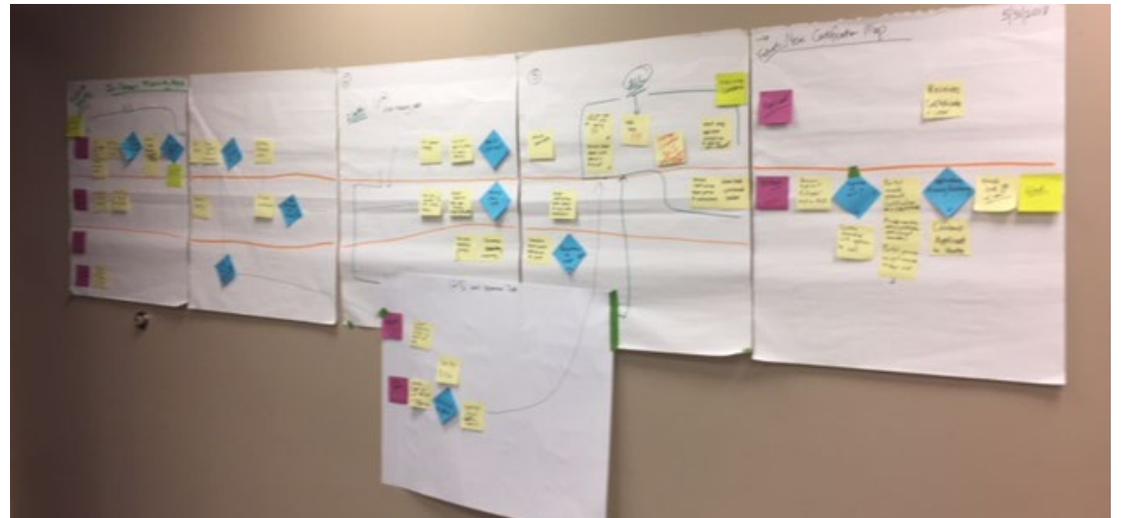
# Voice of the Process:

- Task – An Identifiable chunk of work.
- Decision Point – questions asked which determines the next task.
- Function - role to carry a task.
- Waste/Delays – non-value added items that drain resources.
- Points of entry – entrance to the process, impacts standardization
- Loopbacks – re-work , redirection, reprocess



**Begin with  
current state.**

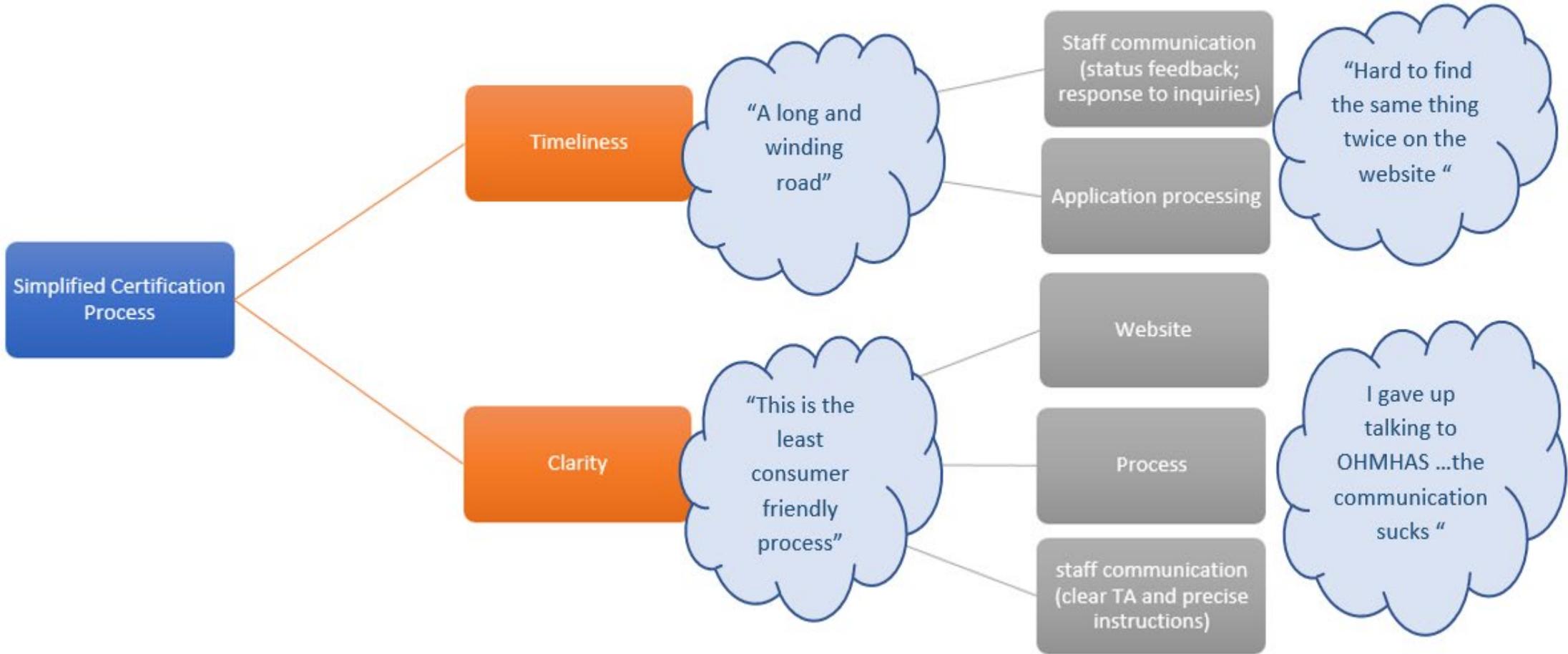
**Re-design after  
brainstorming.**



# NEED

# DRIVERS

# CTQ Requirements



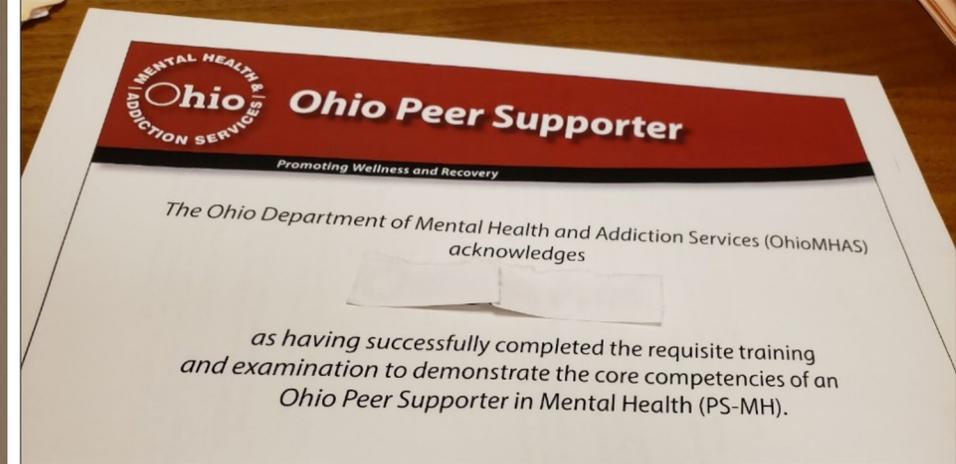
**M**EAASURE – how are we  
doing now?

# Evidence of the problem:

- 51 phone calls in 5 days (just Sharon)
- 189 e-mails in 4 days (all staff)
- 60 applications under review
- 298 applicants waiting to test
- 1,227\* waiting for training

# Customer wants a timely and simple process to be a certified peer support provider sources -

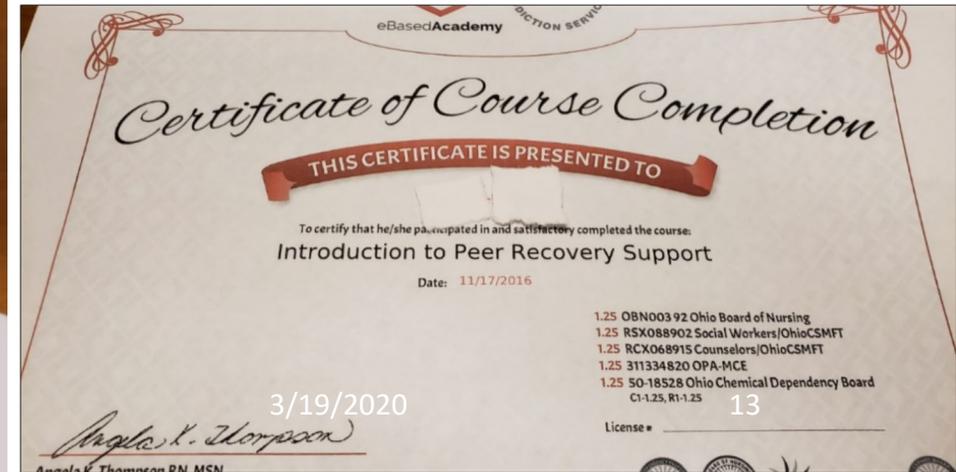
Staff communications	Application	Incomplete applications	Application timeframe	Impact on workforce
Incoming phone calls voice messages Outgoing phone calls and voice messages	Number of email messages into agency and sent out to applicant .	Number of applications that are incomplete and pending for more information	<b>Number of days from date of application receipt to the date that the certificate is sent out</b>	Number of certified peer support providers



1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th	14th	15th	16th	17th	18th	19th	20th	21st	22nd	23rd	24th	25th	26th	27th	28th	29th	30th	31st
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

August 27, 2019 Onsite – paper file review

- Random sampling

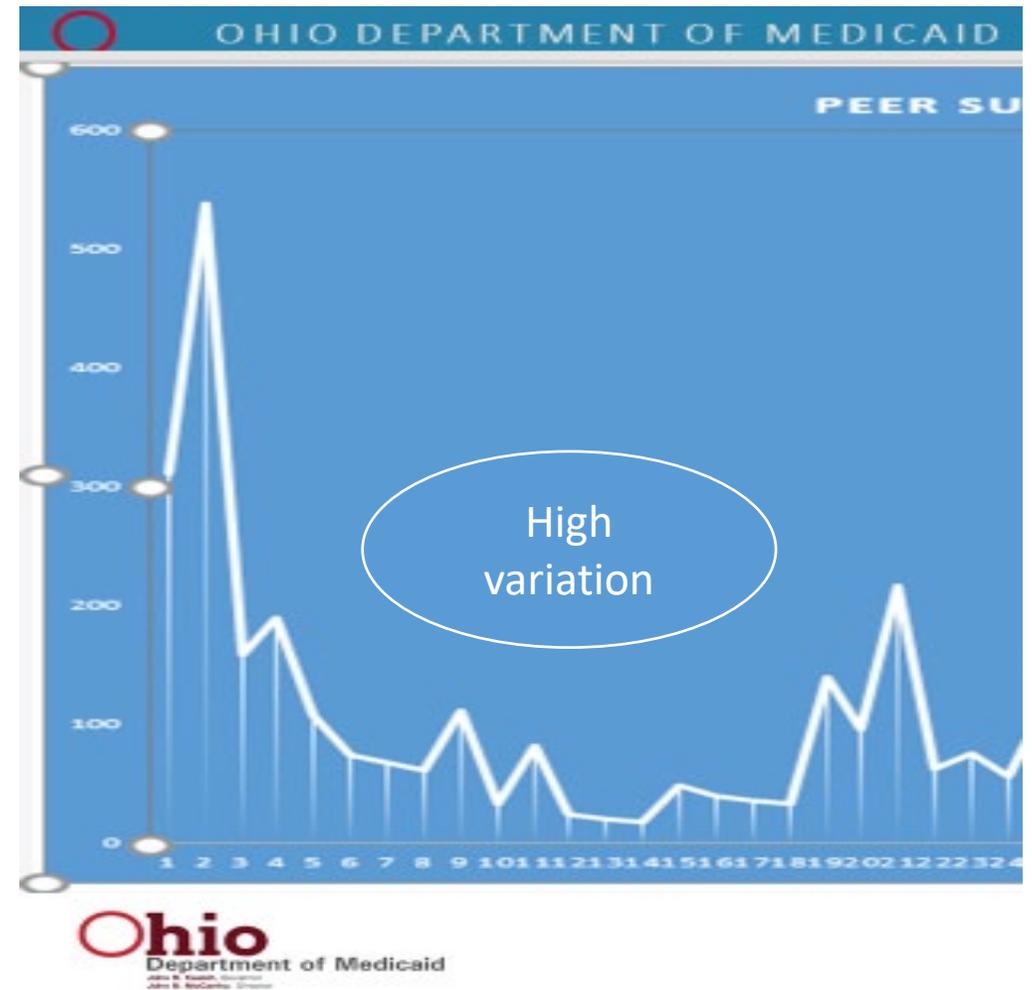


# Operational Definition — the days between...

- Date the applicant signed the peer supporter certification application.
- Date the applicant's peer support certificate is signed off

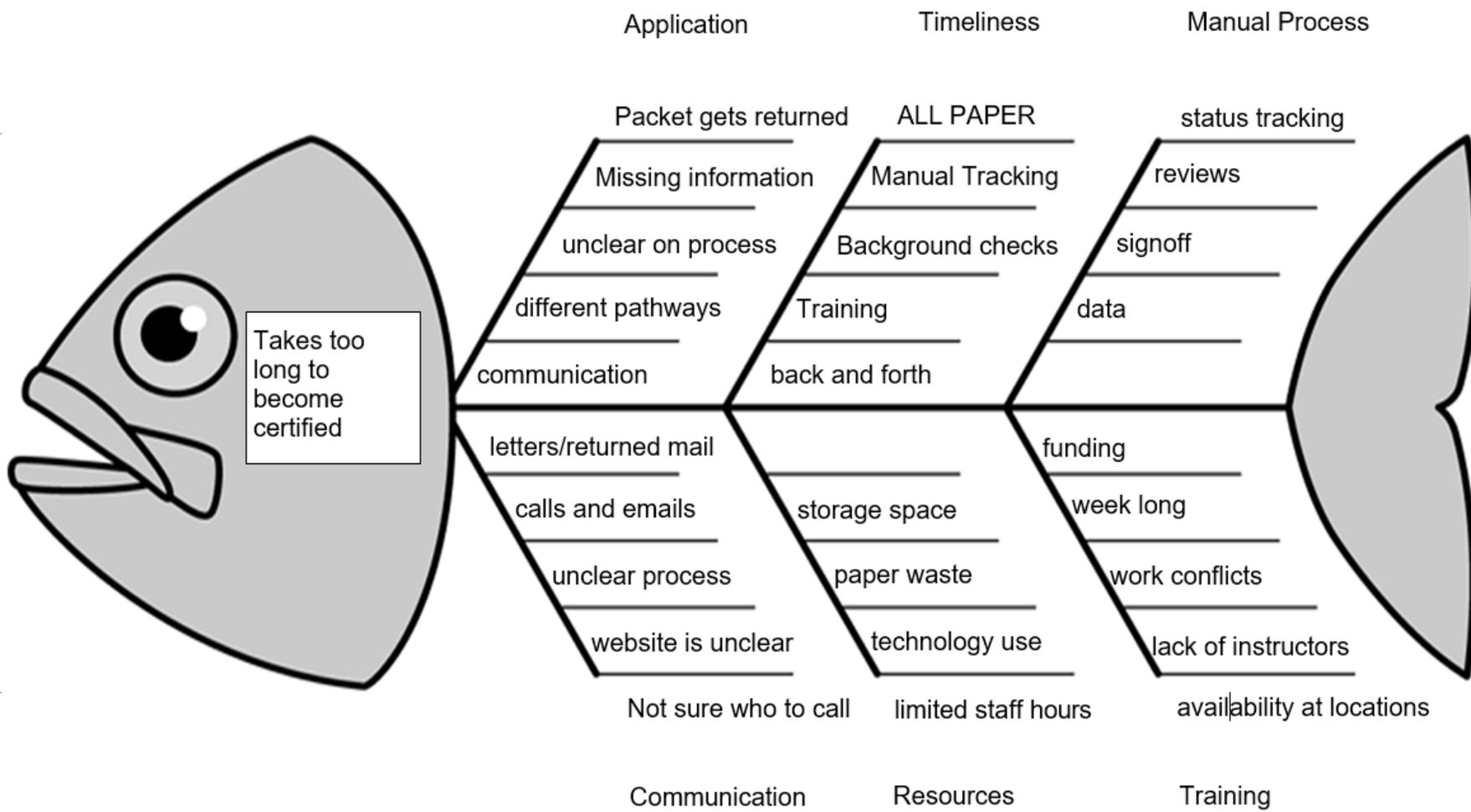


C	R	U
Application Date	Date Originally Certified	Process Days
06/28/18	11/2/2018	127
07/02/18	11/2/2018	123
07/11/18	11/2/2018	114
08/27/18	11/2/2018	67
07/20/18	11/2/2018	105
07/31/18	11/2/2018	94
08/07/18	11/2/2018	87
08/04/18	11/2/2018	90
08/16/18	11/2/2018	78
08/16/18	11/2/2018	78
05/17/18	11/2/2018	169
08/16/18	11/2/2018	78
08/27/18	11/2/2018	67
04/05/18	11/2/2018	211
08/23/18	11/23/2018	92
10/22/18	11/23/2018	32
10/03/18	11/30/2018	58
10/01/18	12/14/2018	74
10/26/18	12/14/2018	49
09/27/18	12/14/2018	78
10/30/18	12/14/2018	45
11/14/18	12/14/2018	30
09/20/18	12/14/2018	85

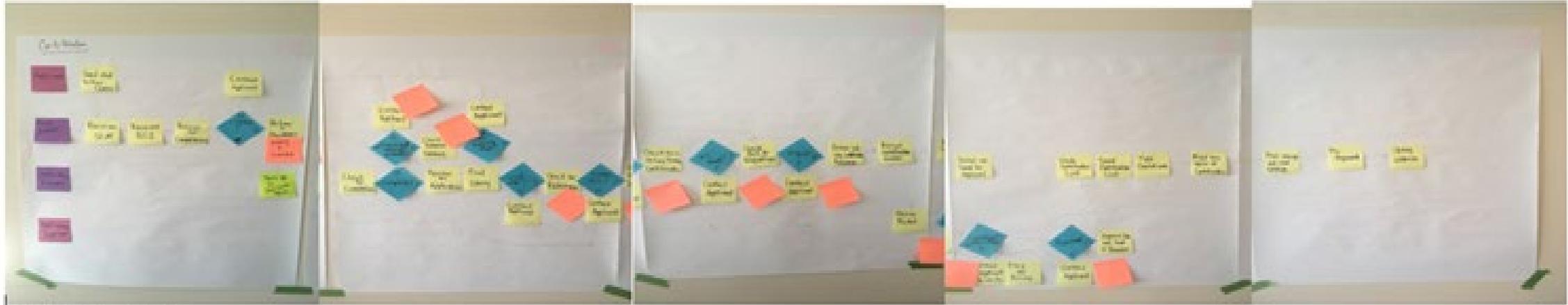


**A**NALYZE- Why is this  
problem happening?

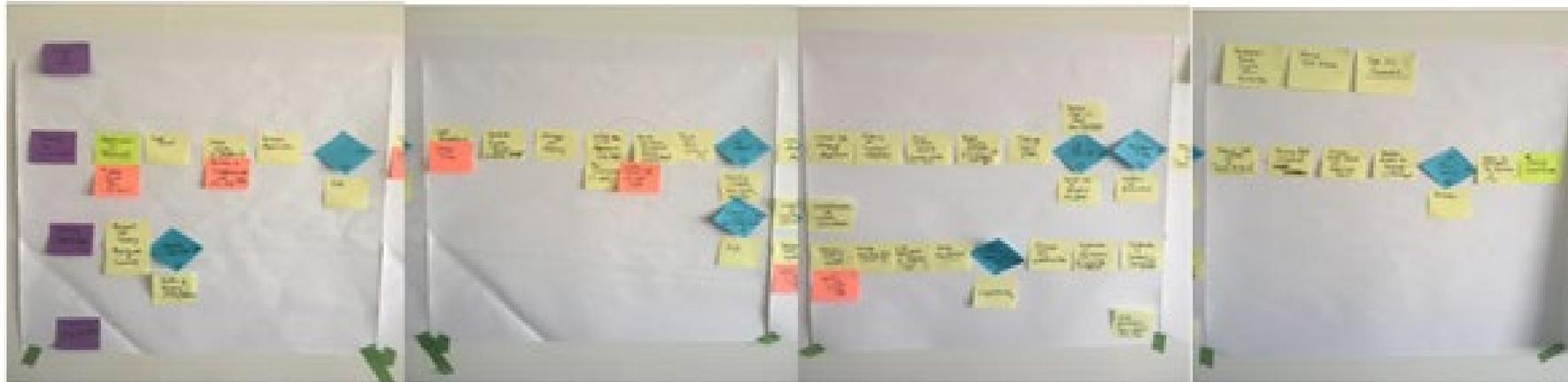
# Fishbone



# TIM U WOOD – identify waste



Certification mapping



Training current state

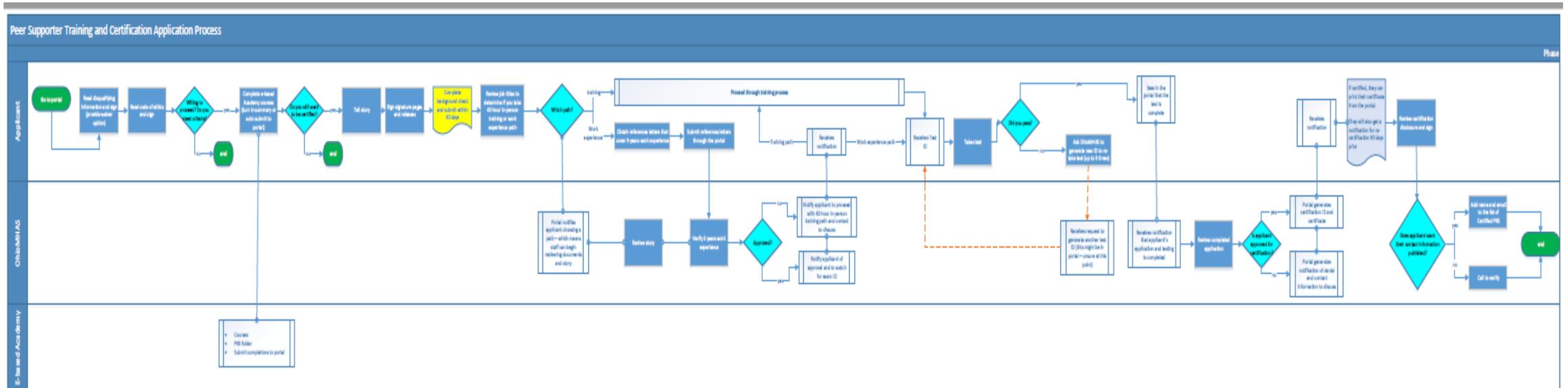
# Current State

(results from mapping the current process resulted in the following information. Since we are looking to combine processes which overlap, we also took stats on the combined process)

	<u>Training Process</u>	<u>Certification Process</u>	<u>Combined Process</u>
Tasks	52	46	98
Decision Points	8	12	20
Functions	5	4	6
Delays and Waste	32	27	59
Points of Entry	4	3	4
Loopbacks	3	10	13

**I**MPROVE- How are we going to fix the problem?

# Clean sheet redesign



# Process Mapping: Future State

	<u>Training Process</u>	<u>Certification Process</u>	<u>Combined Process</u>
Tasks	52	46	98
Decision Points	8	12	20
Functions	5	4	6
Delays and Waste	32	27	59
Points of Entry	4	3	4
Loopbacks	3	10	13

**BEFORE**

	<u>Training Process</u>	<u>Certification Process</u>	<u>Combined Process</u>
Tasks	17	22	36
Decision Points	4	7	11
Functions	3	2	3
Delays and Waste	TBD	TBD	TBD
Points of Entry	1	1	1
Loopbacks	0	2	2

**AFTER**

# Process Mapping: Change Scorecard

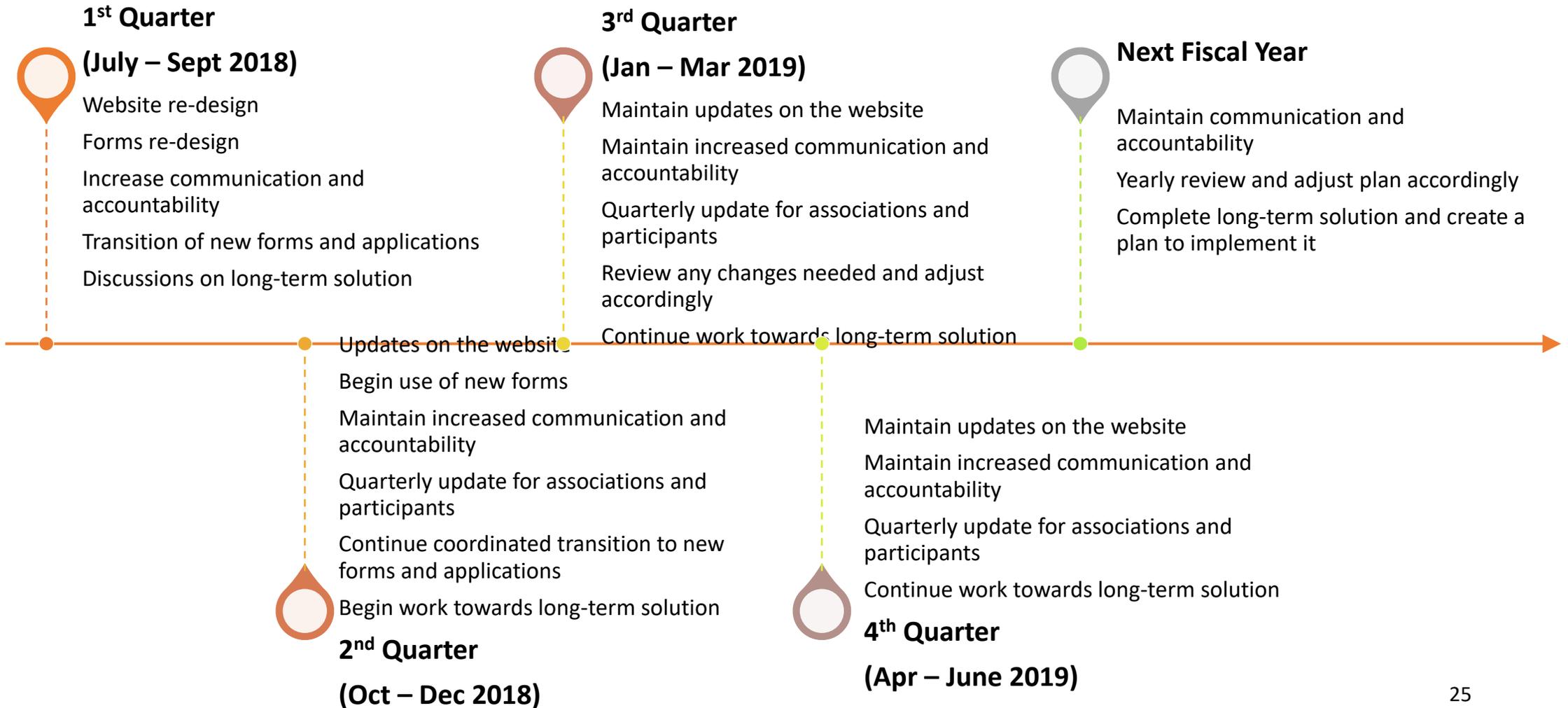
	<u>Training Process</u>		<u>Certification Process</u>		<u>Combined Process</u>	
	<u>Change</u>	<u>% Change</u>	<u>Change</u>	<u>% Change</u>	<u>Change</u>	<u>% Change</u>
Tasks	-35	-67%	-24	-52%	-62	-63%
Decision Points	-4	-50%	-5	-42%	-9	-45%
Functions	-2	-40%	2	-50%	-3	-50%
Delays and Waste	-	-	-	-	-	-
Points of Entry	-3	-75%	-2	-67%	-3	-75%
Loopbacks	-3	-100%	-11	-85%	-11	-85%

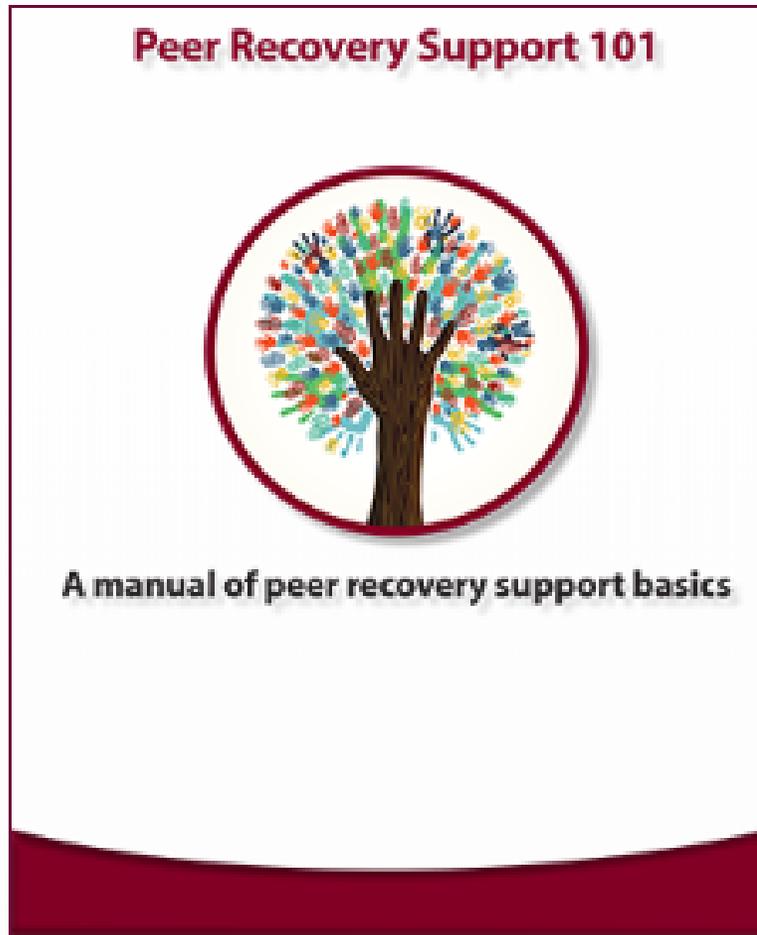
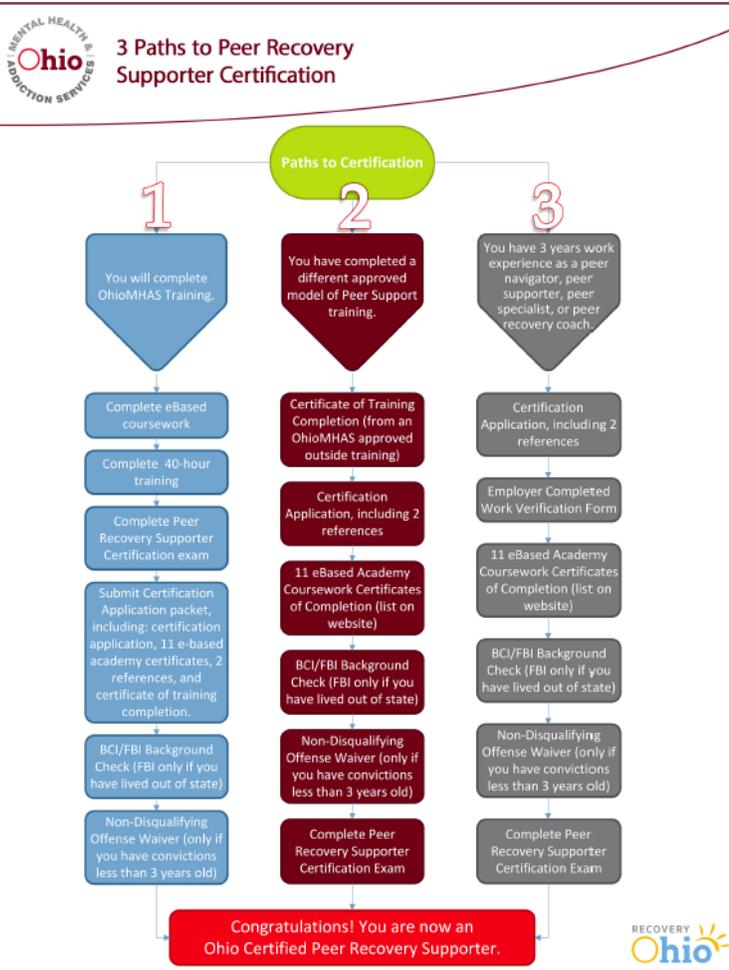
# List of Solutions

Solution	Summary	Status
Technological Solution	Funds were identified and IT staff were assigned. Discontinued due to administration change.	✗
Forms and Database Re-design	Poke-yoked forms to be more user-friendly and created fillable pdfs Peer Database cleaned and updated to provide better customer service to applicants	✓
E-Based Certificate	Grouped 12 certificates into one condensed package	✓
Website Re-design	Website made more user-friendly, specific instructions based on history and work experience, and added communication around peer updates	✓
Plan for Applicants	Developed Peer Career Ladder and 12 Steps to Certification one-pagers	✓
Communication Plan	Improve communications via website, create Newsletter or E-update, convene more opportunities for peers to provide feedback	✓



# Action Plan





Additional changes added:

Peer Recovery Support Manual

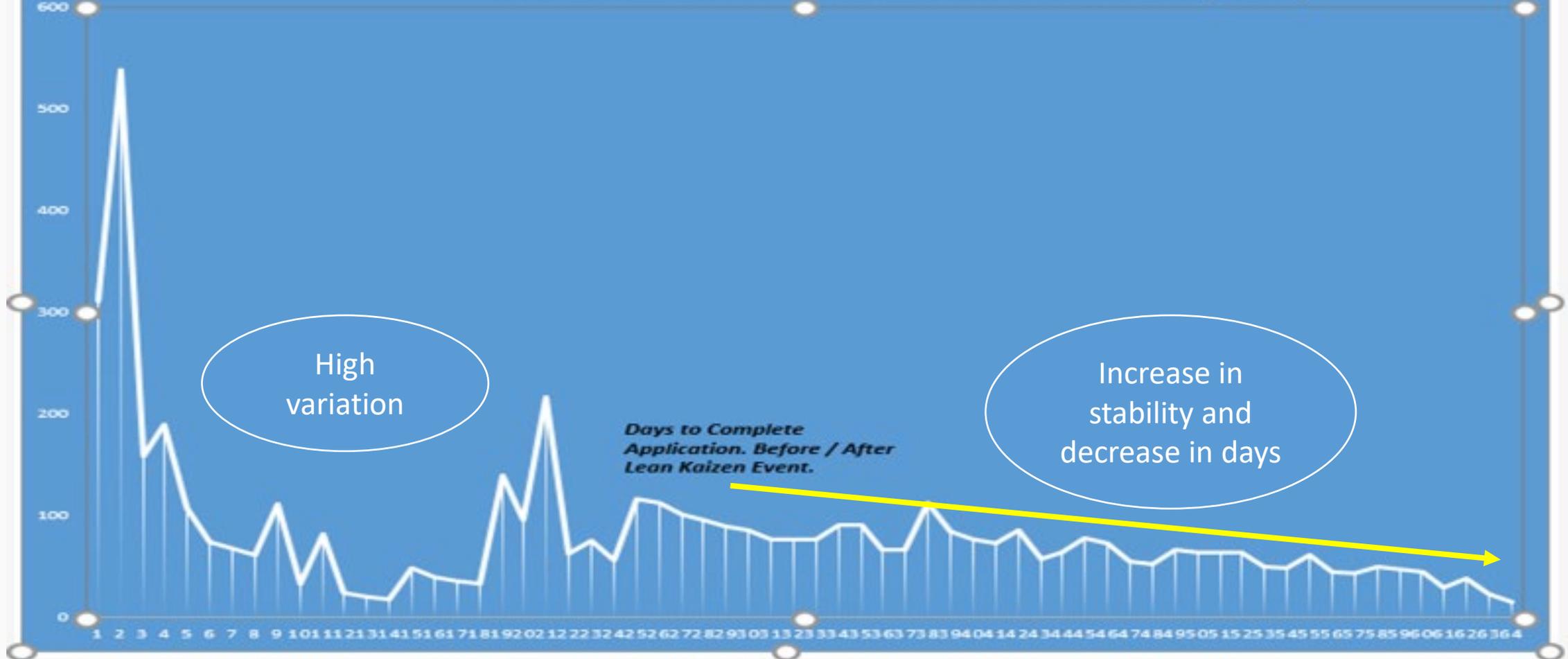
3 paths to Peer Recovery Supporter Certification  
handout

<https://mha.ohio.gov/Health-Professionals/About-Mental-Health-and-Addiction-Treatment/Peer-Support>

**C**ONTROL- How will we  
standardize and maintain  
improvements?



PEER SUPPORT CERTIFICATION APPLICATION (DAYS)



High variation

Increase in stability and decrease in days

Days to Complete Application. Before / After Lean Kaizen Event.

# Any future work in this area has been transitioned to the Governor's RecoveryOhio Initiative



## Recovery Support

The adoption of recovery by mental health and addiction treatment systems in recent years has signaled a dramatic shift in the expectation for positive outcomes for individuals who experience mental health and/or substance use disorders. The value of recovery and recovery-oriented systems of care is widely accepted by states, communities, health care providers, peers, families, researchers, and advocates.

The process of recovery and wellness maintenance is personal and occurs via many pathways. It may include clinical treatment, medications, faith-based approaches, peer support, family support, self-care, and other approaches. Recovery supports promote individual, program, and system-level approaches that foster health and resilience (including helping individuals with behavioral health needs to "be well," manage symptoms, and achieve and maintain abstinence); increase housing to support recovery; reduce barriers to employment, education, and other life goals; transition individuals from institutional settings to community living; and connect to necessary social supports in their chosen community. Focus areas for recovery and wellness maintenance:

- **Peer support and peer-run organizations:** Through the promotion of sharing personal experience and knowledge, individuals engaged in peer support play an active and vital role in laying the foundations for sustained recovery. Peers are an important part of Ohio's behavioral health workforce. "Peer recovery supporter" is an all-inclusive term consisting of peer specialists, recovery coaches, and peer supporters. As individuals with lived experience, peers offer a unique type of support for people in treatment, recovery, or those working to manage their illness.

Consumer-operated services (also known as peer recovery organizations) and recovery community organizations provide services or activities that are planned, developed, administered, delivered, and evaluated by people, a majority of whom have a direct lived experience of a mental health and/or substance use disorder. The peer-run organizations have a primary goal of enhancing the quantity and quality of support available to individuals seeking recovery from mental health or substance use disorders.

# Peer Listening Sessions

- RecoveryOhio workgroup traveled to Four sites (PRO's and RCO's)
- Approximately 125 individuals attended (including certified peers, peers in training, supervisors, trainers, provider agencies, and other stakeholders)
- Sessions consisted of two hour "dialogues" with groups around Peer Support
- Identified Challenges and Barriers
- Brainstormed Solutions
- Voted on highest priority solutions
- Report published by OhioMHAS Feb, 2020



# Lean on me

When you're not strong...

**WE ALL NEED SOMEBODY TO LEAN ON**

*Thank you Ohio Department of Medicaid, OHMHAS for supporting me.*

*Special thanks to the LeanOhio staff and liaisons and teammates for pushing me to go further and believing in my success.*