



Provider Manual for Recovery Planning

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Section A. Welcome and Overview

The Recovery Plan Template is intended to provide individuals and their support network a tangible, yet flexible, tool in their journey towards “recovery” (living the life they want to live). The plan provides a framework for three core elements towards Recovery: Illness Monitoring, Wellness Management, and Crisis Preparation.

This tool was initially developed for use in Allegheny County for adults with serious mental health challenges and often co-occurring substance abuse issues. The Recovery Plan tool is meant to assist individuals with developing self-efficacy through the use of supports in their community and to develop treatment or service plans that make sense for them in their recovery journey. Community Care would like to acknowledge the work of Richard Goldberg, Ph.D. from the University of Maryland and his peers for their willingness to share this tool as a model that can be used and adapted to meet the needs of individuals on their recovery journey. There are many recovery tools that serve similar purposes for individuals in recovery and we encourage our members and providers to explore all resources.

This tool outlines three important components of a good recovery plan that can assist individuals on their road to recovery:

- 1) Illness Monitoring: Help the individual become more aware of triggers, as well as signs or symptoms, that may indicate that they are not doing well and need more support. The goal is to help individuals learn the skills they need to better monitor their illness and use their coping skills and supports to help prevent a crisis from occurring.
- 2) Wellness Management: Help the individual identify strategies that help him/her relax, feel distracted, and more in control. The link between these strategies and when to implement them as identified in the Illness Monitoring section should be discussed and planned for with the individual and their support network. Focus should be on using these strategies to aid with illness monitoring and to support daily maintenance of wellness.
- 3) Crisis Preparation: Help the individual to create a plan in case a crisis cannot be prevented.

A successful Recovery Plan will be one where the individual develops the content with the support of his/her treatment team. Listen, reflect, and learn through an open-ended conversation around these topic areas.

The completed treatment plan should be shared by the individual with his/her support network and should be updated regularly.

Section A1. Guidelines for Use of the Recovery Plan Tool

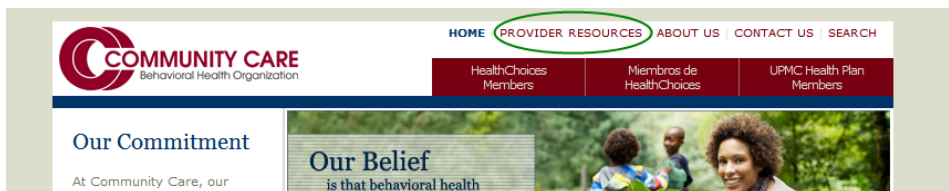
The Recovery Plan can be used as a guide for discussion around recovery and wellness. Use this as structure to get to know someone (i.e. as part of your efforts to actively and meaningfully engage the member).

- Make sure the plan **belongs** to the individual. Ideally, a recovery plan should be developed with the individual at a time when s/he is calm. As much as possible we want to help the individual have ownership of their own plan, rather than seeing it as some kind of routine paperwork they are required to do for the mental health people working with them. With many people, it will be best to work through it with them item by item, giving plenty of encouragement and validation, but others will prefer to fill it out on their own – you also might use a combination of these approaches. Be sure to allow time to add or explore other options in addition to the examples provided in each section.
- Ideally, this plan should be developed with all relevant services and natural supports. When possible, encourage it to be shared with the individual’s support team. Someone should be identified as a point person to guide it when crisis happens.
- Make the plan a **living document** – The recovery plan should be taken out and used when a problem is brewing and it should be revised whenever there has been an incident that threatens wellness or to help avert a potential crisis. As more is learned about triggers, warning signs, useful interventions, and what to avoid doing, all of this information should be added to the plan. We recommend that the Recovery Plan be reviewed on a regular basis with the individual, especially following a crisis or significant event or change in the person’s life.

When the plan is solidified, you and/or the member can reformat it to include only the sections/items relevant for him/her. You may want to take the information on the form and put it in a more easily accessible format. For example, you could make a 3X5 card with “Things to notice” on one side and “Things to try” on the other. If helpful, consider laminating, making additional copies, getting a small notebook or folder, etc.

Section B. Accessing the Recovery Plan

The Recovery Plan is accessible via Community Care’s public website (<http://www.ccbh.com>) in the Provider Resources section under Member Help Center. To navigate to the Recovery Plan, click on the “Provider Resources” link in the upper right hand corner of the page.



The Recovery Plan can be found in the Member Help Center. Click on “Member Help Center” on the left side of the Provider Resources page.

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Recovery Plan

The Recovery Plan is intended to provide individuals and their support network a tangible, yet flexible, tool in their journey towards "recovery" (living the life they want to live). The plan provides a framework for three core elements towards Recovery: Illness Monitoring, Wellness Management, and Crisis Preparation.

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A successful Recovery Plan will be one where the individual develops the content with your support. Listen, reflect, and learn through an open-ended conversation.

To open the Recovery Plan, click on "Recovery Plan" under "Recovery/Crisis Plan Documents." This will open the Recovery Plan in a new browser window. **We recommend saving a blank Recovery Plan to your computer before you begin to complete it.** You can also save the Recovery Plan directly to your computer without opening the document by right-clicking on "Recovery Plan" and then selecting the "Save Target As..." option. By saving a blank copy of the Plan to your computer you will eliminate the need to visit the Community Care website each time you wish to complete a Recovery Plan.

In order to view and use the Recovery Plan, you will need Adobe Acrobat Reader version 7.0 (or higher). If you need the Acrobat Reader, you can download it free from the Adobe website (<http://www.adobe.com>). If you have problems opening the file, go to the Adobe website and download the most recent version of Adobe Acrobat Reader. You can also click through the link on the Recovery Plan page of the Community Care website.

Section C. Completing the Recovery Plan

Section C1. Components of the Recovery Plan

The Recovery Plan has three parts: Illness Monitoring, Wellness Management, and Crisis Preparation. An asterisk (*) prior to the item indicates an item that is displayed on the final one-page summary of the document when it is completed electronically.

Part 1: Illness Monitoring: the member is asked to identify *triggers (events that are more likely to inspire unsafe/upset feelings), *thoughts/inside warning signs (things the member may notice just before feeling unsafe or upset), and *outside warning signs (things others may notice just before the member feels unsafe or upset).

Part 2: Wellness Management: the member is asked to identify actions they or others could take to prevent or manage their symptoms. These items include: *things that help them stay better or feel more in control now, *things that help them stay well on a regular basis, *things that make them feel worse,

*actions/contacts for when the member notices triggers or warning signs, *actions others can take to prevent things from getting worse, and ways the member can reward themselves for successfully navigating stressful times.

Part 3: Crisis Preparation: the member is asked to describe what behaviors, feelings, and thoughts constitute a true crisis for them and to develop an action plan in the event of a crisis. The action plan includes a *series of contacts the member/others can reach out to during a crisis. When completed electronically, these contacts can be moved up or down the list to create an ordered sequence. The member is also asked to list things that worked or didn't work during past crises.

Section C2. Completing the Recovery Plan Electronically

The Recovery Plan can be accessed online and completed on your computer through an editable PDF. You can view which fields can be checked or typed into by clicking the "Highlight Fields" button at the top of the screen (shown below).

The screenshot shows the 'Community Care Recovery/Crisis Plan' form in Adobe Acrobat Standard. The form is titled 'Community Care Recovery/Crisis Plan' and includes sections for 'PART 1: ILLNESS MONITORING' and 'THOUGHTS/INSIDE WARNING SIGNS'. The form contains various checkboxes and text input fields. A 'Highlight Fields' button is visible in the top right corner of the form area. The form is displayed in a window titled 'RecoveryCrisisPlan.pdf - Adobe Acrobat Standard'.

You may type answers into any field bars that are highlighted in blue – simply click on the highlighted box and type. The smaller check boxes can be also be filled in simply by clicking on them. You may also tab through items and fill in check boxes by pressing the space bar.

A note about answers marked "Other": for each question that lists "Other" as a possible answer choice, there is only one answer field. You can enter multiple items in these fields if desired by separating the answers with commas.

As you fill out the Recovery Plan, responses to select questions will be condensed and displayed on the last page. This one-page summary of the completed Plan provides a convenient way for the member to carry their Recovery Plan with them wherever they go. This page has no identifying information (last name, contact information for friends/family members/supports, etc.) in case it is lost.

After you have completed the Recovery Plan with a member, print a hard copy for the member as well as for the member's file or record by clicking the "Print" button located on the bottom of each page of the PDF (visible in the above screen shot). Clicking this button on any page will print the entire document.

You may also find it useful to save the completed Recovery Plan. By saving the completed Plan on your computer, you will be able to access the Plan at a later date if the member wishes to make changes without needing to start over with a blank Plan. Choose "Save As" to save the completed Plan to a local drive on your computer. If you wish to keep a blank template of the Plan on your local drive, remember to use the "Save As" command, and not the "Save" command. Give the file a meaningful name that specifies which member the plan belongs to as well as the date the plan was created/revised, recorded numerically. For example, a file with the title "Recovery Plan Smith 20120501" indicates a Recovery Plan for a member with the last name Smith that was created on May 1, 2012. The complete Recovery Plan contains identifiable information and should be maintained as other personal health information. Computers should have limited access and files should be password protected.

Section C3. Completing the Recovery Plan on Paper

The Recovery Plan can also be completed on paper from photocopies of the PDF available on Community Care's public website. There are a few drawbacks to completing the Plan on paper.

- If the Plan is only completed on paper, there is no electronic record that allows you and the member to revise the plan in the future. You would need to start over with a new paper copy of the Recovery Plan.
- The electronic PDF produces a single sheet of condensed information that the member can easily carry with them that must be created by hand if completing a Recovery Plan on paper. Therefore, it may be beneficial to complete and save an electronic version of each Plan created, even if the original copy was completed on paper.