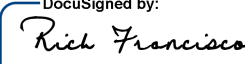




Policy/Procedure Title: Orientation: Addressing Educational Needs of Persons Served	Policy and Procedure #: 11-003	<u>Review Dates</u>	
Category: Community Relations Subject: Orientation: Addressing Educational Needs of Persons Served	Prepared by: Name: Gary Ridley Title: Communications Manager Approved by: DocuSigned by:  Rich Francisco, Executive Director	05/06/2026	
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I. POLICY

It is the policy of HealthWest to provide orientation and education appropriate to the needs and abilities of individuals served throughout their enrollment and in compliance with the Michigan Department of Health and Human Services (MDHHS) requirements and standards put forward by accrediting bodies.

II. PURPOSE

- A. To assure a welcoming and caring culture where individuals served are provided with access to complete information about service array, provider options, costs of services, and rights and due processes.
- B. To improve quality of life outcomes of individuals served by promoting self-advocacy and informed choice, and to establish a consistent process for distribution and documentation of Education and Orientation.

III. APPLICATION

Providers of behavioral health services and programs operated or funded by HealthWest and for the benefit of beneficiaries and potential beneficiaries.

IV. DEFINITIONS

Education: A process for delivering information appropriate to the needs of the individual served and type of service provided, understandable to the person served and includes:

- 1. Orientation to the agency’s purpose, mission and vision, and procedures.
- 2. Orientation of the person served to specific programs and services.
- 3. Rights and Responsibilities of the persons served.

Educational Materials: Any materials or supports used to accomplish the policy purpose.

Family: The primary caregiver, guardian, and/or significant other.

Person Served: An individual who is receiving behavioral health services from a Community Mental Health service provider/CMH program (HealthWest) or who has previously received services in the system.

Certified Peer Support Specialist: An individual who has a personal experience with mental health services and who has received special training to use that shared experience to educate, mentor or advocate with the person served.

V. PROCEDURE

- A. Education is an ongoing benefit and will occur throughout the service relationship in a variety of ways.
1. An Individual will be assessed at intake and throughout their enrollment for the most appropriate method to assure understanding and promote choice and control.
 2. At enrollment and throughout service the individual served will be informed of:
 - a. Rights and responsibilities of the person served.
 - b. Grievance and appeal procedures.
 - c. Availability of Peer Support Specialist Services.
 - d. Array of services and providers in the network.
 - e. Ways in which input is given regarding:
 - i. Quality of Care.
 - ii. Achievement of outcomes.
 - iii. Satisfaction of persons served.
 3. Program-specific orientation will occur at intake, transfer and discharge. Program Managers are responsible to develop orientation procedures specific to each program and the individuals served. Education will include:
 - a. Program expectations for the individual.
 - b. Discharge criteria and /or termination of services.
 - c. Medical advance directive and psychiatric medications, as required.
 - d. Orientation to program site; exits, shelters, fire suppression, and emergency procedures.
 - e. Discussion of rights and privileges of the person served; including, loss and reinstatement.

- f. Policy on use of seclusion/restraint.
 - g. Policy on illicit or licit drugs and weapons brought into the facility.
 - h. Policy on smoking.
 - i. The capacity of the program.
 - j. Transition criteria and procedures.
 - k. Hours of operation of the program.
4. Orientation / Education will be documented in the medical record.
5. The agency standards promote active meaningful engagement of persons served.
- a. Education incorporates learning, skills development, treatment, health and other related services that promote and facilitate supported independence, community inclusion and productivity, including employment and volunteerism.
 - b. Annually staff will assess the knowledge and understanding of core principles of self-direction and will facilitate opportunities for learning and renewal; including, but not limited to:
 - i. Purpose and process of assessment(s).
 - ii. Purpose and process of Person/Family-Centered Planning, including purpose of natural supports.
 - iii. Provide cost of services/supports he/she is receiving at the time of person-centered planning.
 - iv. The amount, scope, and duration of benefits available in sufficient detail to ensure beneficiary understands their entitled benefits.
 - v. Approaches to risk versus choice (Health and Safety).
 - vi. Services and activities offered by the agency (array of services).
 - vii. Access to tools of self-direction: WRAP, Peer Support, consumer groups, volunteer and employment opportunities, Independent Facilitators /Brokerage Service, Advance Directives, Crisis Plans, and Instruction in Self-Advocacy and Self-Determination.
 - viii. Involvement in outcomes evaluation by person served.
 - ix. Transition criteria and procedures.
 - x. Code of ethics.

- B. The material covered in orientation will include self-determination, person-centered planning, recovery and resiliency, customer satisfaction, active engagement, recipient rights, grievance and dispute resolution and information about local support groups and advocacy organizations. Individuals served will have access to Best Practice Guidelines through Customer Services. Peers who have received training will provide orientation and recovery education whenever possible with support of HealthWest staff. (See Guidelines for Peer Led Orientation)
- C. The Customer Services staff will distribute and, when needed, produce the necessary materials to support required education, including but not limited to services handbooks, brochures, web sites and other formats as needed.
- D. The Customer Services staff will provide customer service information to providers of behavioral health services and monitor their method of distribution.
- E. The HealthWest Director or his/her designee will identify a HealthWest staff person in each program or location to be responsible for implementing the orientation/education requirements.
- F. The Quality Improvement and Customer Services staff will monitor the individual and family education required throughout enrollment and as defined by the MDHHS contract in compliance with other standards and procedures.
 - 1. The person served will be notified annually of their right to request information about the service delivery system and their individual rights as recipients of HealthWest Services.
 - 2. Assessment throughout enrollment will ensure education will be provided in the manner best suited for the individual. For example: An individual is unable to read an essential document (whether the individual is illiterate or temporarily incapable because of medication issues), and they may not be able to legally sign receipt of information in printed text. The agency staff will provide an alternative such as verbal communication or modifying the time of the activity.
- G. Customer Service representative(s) will collaborate with persons served, providers, and other professionals to implement community-wide educational events.
- H. Customer Service representative(s) will work with persons served and professionals to develop and publish a quarterly newsletter to educate participants about services, programs, supports, and accomplishments of individuals served.

VI. REFERENCES

- A. Vocational Rehabilitation Act, 1973 Section 504
- B. Americans with Disabilities Act, Title II
- C. Balanced Budget Act, Title 42, Part 438, subpart A and subpart K
- E. Receipt of Recipient Rights Pamphlet and Orientation Materials, C049
- F. HealthWest Service and Provider Guide at the following internet address:
www.healthwest.net