



Psychiatric Advance Directives & Crisis Management

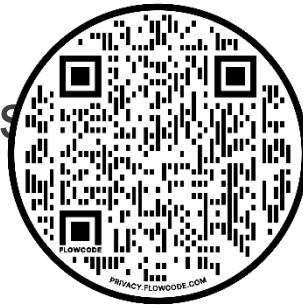
Waynette Brock, MLuv Wallace & Matthew Federici

September 30, 2024



Indigenous Land Acknowledgement

- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California and in displaying respect, honor, and gratitude for all Indigenous people.



Whose land are you on?

Option 1: Text your ZIP code to 1-907-312-5085

Option 2: Enter your location at <https://native-land.ca>

Option 3: Access the Native Land website via QR Code

Community Agreements

- Be present and be an active listener.
- Remember: One mic, one voice.
- Practice inclusivity.
- Honor pronouns and gender identity.
- Show respect. (This may look different for each person.)
- Allow conflicting perspectives to exist.
- Assume best intentions.
- Take space, make space.
- Share what you are comfortable sharing.
- Protect individual privacy.
- Practice self-care.
- Encourage growth of self and for others.
- Support resource sharing.





Learning Objectives

- Introduction to Psychiatric Advance Directives (PAD) & Crisis Management.
- PADs and its importance in mental health treatment preferences.
- The Role of Peer Support in PAD Creation.
- How to lead effectively during a crisis.
- Learn about PAD training opportunities for peers.

Presenters



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“

One New Heartbeat, in partnership with The Copeland Center for Wellness and Recovery, believes everyone should have access to wellness-centered support. We are committed to equipping individuals with the knowledge and tools they need to take charge of their own well-being.

”



Introduction to Psychiatric Advance Directives & Crisis Management

Definition & Importance:

- Psychiatric advance directives (PADs) allow individuals to outline their mental health care preferences.
- PADs are critical for ensuring decisions are respected during crises.
- PADs are sometimes referred to as mental health advance directives (MHADs).



Advance Directives & Psychiatric Advance Directives

Advance Directives

- An advance directive outlines a person's wishes in the event that they are incapacitated or unable to express wishes for health care and treatment.
- Under federal law, any facility receiving Medicare or Medicaid reimbursement is required to use advance directives. Individuals with physical and mental health conditions are covered under this mandate.

[\(Bazelon Center for Mental Health Law, n.d.\)](#)

Advance Directives & Psychiatric Advance Directives

Psychiatric Advance Directive (PAD)

A psychiatric/mental health advance directive is a legal rights document that allows a person to make preferences regarding mental health treatment known in the event that the person is determined not to be able to make decisions about their treatment and/or is determined incapacitated based on state laws. This person is giving or withholding consent to treatment in advance of when treatment is needed.

[\(NRC PAD, n.d.b.\)](#)

Crisis Management

Crisis Management Defined

Crisis management in mental health refers to the strategies and interventions employed to support individuals during mental health emergencies or breakdowns. Effective crisis management helps reduce harm, stabilize the situation, and restore functioning.

The Role of PADs in Crisis Management

PADs are crucial tools for crisis management because they allow individuals to outline their preferred care and treatment during a mental health crisis, especially when they might not be able to communicate their wishes effectively. Having a PAD in place enables the following:

- **Pre-emptive Planning:** Individuals can anticipate potential crisis situations and guide health care professionals on how to manage their care.
- **Reducing Uncertainty:** PADs provide clarity to mental health providers, family, and friends on the individual's wishes, reducing the uncertainty that often arises during crises.
- **Supporting Autonomy:** Even during a crisis, individuals maintain a sense of control over their treatment, as the PAD reflects their preferences.

[\(Swanson, et al., 2009\)](#)

Relationship Between PADs and Crisis Plans

Relationship Between PADs and Crisis Plans

Crisis management plans are often a key component of PADs. These plans:

- Include directives for specific interventions, medications, and treatments to avoid.
- Specify trusted individuals who can make decisions if the person is incapacitated.
- Outline strategies for de-escalation and support that have been effective in the past.

Legal and Practical Implications

PADs provide a legally binding document that ensures mental health professionals must consider the individual's choices during a crisis. It enhances the coordination of care by aligning legal and medical protocols.



Psychiatric Advance Directives and Their Importance in Mental Health Treatment Preferences

Why Are PADs Important?

- Benefits include ensuring proper care and potentially preventing involuntary treatment.
- PADs can be shared with local hospitals, providers, and law enforcement.
- Clearly stated care preferences make it easier for these entities to prioritize the individual's needs.
- Informed family members can become better advocates for their loved ones.

How Advance Planning in Mental Health Benefits Individuals and Families

- PADs empower individuals and provide clarity to family and friends in times of crisis.
- Planning ahead ensures that treatment preferences are honored and can prevent involuntary treatment. Families experience reduced stress knowing that decisions reflect the individual's wishes.



How PADs Support Mental Health Treatment Preferences

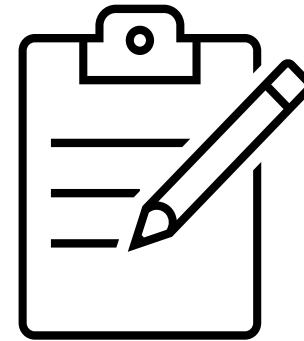
- PADs allow individuals to maintain control over their treatment, prevent unnecessary hospitalization, and serve as a less restrictive alternative to guardianship.
- PADs ensure person-centered care that reflects the individual's choices during times of crisis.



Key Components of a PAD

Content of PAD:

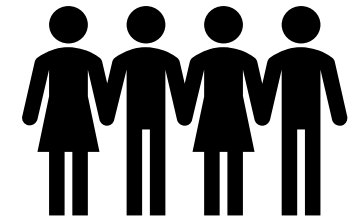
- Treatment preferences
- Emergency contacts
- Health care agents



[\(American Psychiatric Association, n.d.\)](#)

The Power of Shared Knowledge

- PADs can be shared with local hospitals, providers, and law enforcement.
- Clearly stated care preferences make it easier for these entities to prioritize the individual's needs.
- Informed and educated family members can become better advocates for their loved ones.



Federal Self-Determination Act and PADs

- The **Patient Self Determination Act (PSDA)** of 1990 mandates that health care facilities receiving Medicare and Medicaid funding must inform individuals of their rights to make advance directives, including PADs.

How It Benefits Crisis Management:

- **Right to Self-Determination:** Individuals are legally entitled to dictate their health care preferences in advance, ensuring their choices are respected during crises.
- **Legal Recognition:** PADs are a legally binding document under this act, ensuring health care providers and institutions adhere to the individual's crisis plan.
- **Empowerment in Health Care:** By using PADs, individuals exercise their rights under the PSDA to make proactive decisions about their mental health care.

[H.R.4449, 101st Congress \(1989–1990\)](#)

The Patient Self-Determination Act of 1990

The PSDA is a federal law that requires health care facilities receiving Medicare and Medicaid funds to inform patients of their rights regarding advance directives, including Psychiatric Advance Directives (PADs).

The act ensures individuals are empowered to make decisions about their future medical care, including mental health treatment, before they may become incapacitated or unable to communicate their wishes during a crisis.

While the PSDA does not explicitly mention PADs, it covers advance directives more broadly, and PADs fall under the category of advance directives for mental health care.

([NRC PAD, n.d.a.](#); [Teoli & Ghassemzadeh, 2023](#))

Benefits: Federal Self Determination Act - Part 1

Advance planning in mental health, such as creating a **PAD** or a **crisis plan**, can provide significant benefits to individuals with mental illness as well as their family and friends.

Benefits for the Individual:

- **Increased Control:** Advance planning allows individuals to outline their treatment preferences and care decisions, ensuring their voice is heard even during times when they may be unable to communicate due to a mental health crisis.
- **Reduced Stress During Crisis:** Knowing that their wishes are documented and will be respected can bring peace of mind, reducing anxiety about potential involuntary treatments or undesired interventions.

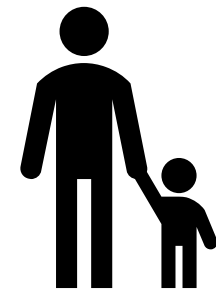
[\(American Psychiatric Association, n.d.\)](#)

Benefits: Federal Self Determination Act - Part 2

Benefits for the Individual Cont.

- **Empowerment:** Advance planning fosters a sense of personal agency, enabling individuals to take an active role in managing their health and well-being.
- **Tailored Care:** With specific instructions about preferred treatments, medications, or interventions, the person is more likely to receive care that aligns with their personal values and needs.

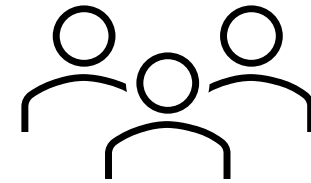
[\(American Psychiatric Association, n.d.\)](#)



Benefits: Federal Self Determination Act - Part 3

Benefits for Family and Friends:

- **Clarity in Decision-Making:** A clear plan provides guidance to loved ones, reducing the emotional burden of making difficult decisions during a crisis. They can confidently follow the individual's wishes rather than guessing at what the person might want.
- **Improved Communication:** Advance planning promotes open discussions about mental health between the individual and their support network, fostering understanding and strengthening relationships.



[\(American Psychiatric Association, n.d.\)](#)

Benefits: Federal Self Determination Act - Part 4

- **Benefits for Family and Friends:**
 - **Better Coordination with Health Care Providers:** A documented plan helps family members collaborate more effectively with health care professionals, ensuring that the individual receives appropriate care aligned with their preferences.
 - **Reduced Conflict:** Clear instructions reduce the potential for disagreements among family members or friends about the right course of action during a mental health crisis.

Overall, advance planning helps create a supportive environment where both the individual and their loved ones can navigate mental health crises more effectively, with greater confidence and reduced uncertainty.

[\(American Psychiatric Association, n.d.\)](#)



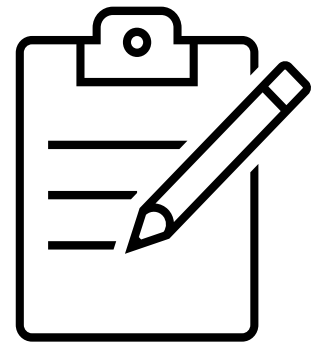
Legal Requirements for Advance Directives

- Under federal law, any facility receiving Medicare or Medicaid reimbursements must utilize advance directives.
- This includes directives for individuals with both physical and behavioral health illnesses.

Legal Aspects

- **Understanding State Laws:**
 - PADs are governed by state-specific laws; understand revocability.
- **Documentation:**
 - Steps for creating a legally sound PAD: witnesses, copies, filings.

SAMHSA has a new app that provides information on PADs as well as state-by-state requirements. Details can be found at <https://attcnetwork.org/news/new-samhsa-smi-adviser-pad-app-is-now-available/>



Steps to Create a Psychiatric Advance Directive

1. Identify your treatment preferences and emergency contacts.
2. Select a health care agent, if necessary.
3. Legally document your preferences with required witnesses.
4. Review and update the document regularly.

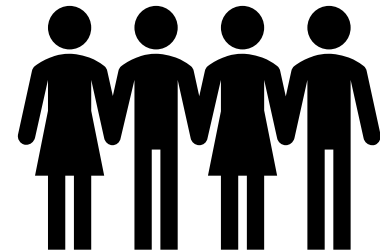
The Role of Peer Support

Peer Support Overview:

- Integral in PAD creation, reducing stigma, and enhancing self-advocacy.

Real-life Applications:

- Example: Positive impact of peer support on PAD experience.



The Role of Peer Support in PAD Creation

Peer support plays a critical role in the creation of PADs by offering individuals a safe and understanding environment where they can express their preferences and concerns without fear of judgment. People with lived experience with mental health challenges—peer supporters—provide unique insights, guidance, and encouragement that can make the PAD creation process more approachable and effective. Here is how peer support contributes:

- **Reducing Stigma**
 - One of the biggest barriers to creating a PAD is the stigma surrounding mental illness and crisis planning. Peer supporters, who have personally experienced these challenges, offer a nonjudgmental space where individuals can openly discuss their mental health preferences.
 - By sharing their own experiences, peer supporters help normalize discussions around mental health crises, making it easier for individuals to plan without feeling ashamed or isolated.

[\(Easter, et al., 2021\)](#)

The Role of Peer Support in PAD Creation

- **Enhancing Self-Advocacy:**
 - Peer support empowers individuals to advocate for themselves by helping them identify their personal values, treatment preferences, and rights. This process allows individuals to take ownership of their mental health decisions.
 - Through shared experiences, peer supporters can demonstrate the importance of self-advocacy and provide practical tools for individuals to communicate their wishes effectively during mental health crises.
- **Emotional and Practical Guidance:**
 - Peer supporters can assist individuals in navigating the complex process of creating a PAD, offering emotional support as well as practical guidance on how to articulate their treatment preferences, identify trusted decision-makers, and ensure their PAD is legally recognized.
 - The peer-to-peer relationship fosters trust, making it easier for individuals to engage in meaningful conversations about their future care.

([Concepts Forward Consulting, n.d.](#); [Easter, et al., 2021](#))

The Role of Peer Support in PAD Creation

- **Promoting Collaboration:**

- Peer supporters encourage individuals to involve their families, caregivers, and health care providers in the PAD creation process. This collaborative approach ensures that everyone in the support network is on the same page and aware of the individual's preferences, enhancing the effectiveness of the PAD.

Overall, peer support is an integral component of the PAD creation process, helping to dismantle stigma, bolster self-advocacy, and provide individuals with the confidence and support they need to make informed decisions about their mental health care.

[\(Concepts Forward Consulting, n.d.\)](#)



How to Lead Effectively During a Crisis

Tips for Conversations Around Crisis Planning



Choose the right moment to initiate the discussion.

Focus on the individual's values, preferences, and concerns.

Involve health care professionals or peer supporters when necessary.

Ensure the conversation is supportive, without pressure.

Key Pillars of Crisis Management

- 1. Preparation:** Establish protocols in advance to ensure swift action during a crisis. Ensure stakeholders know the PAD and plans.
- 2. Communication:** Maintain clear and compassionate communication throughout the crisis, ensuring the individual and their support network are informed.
- 3. Teamwork:** A collaborative approach with peer support, medical professionals, and family members (optional) reduces confusion and enhances care.
- 4. Adaptability:** Remain flexible and adjust strategies based on real-time needs.
- 5. Recovery and Reflection:** Post-crisis follow-up and reflection improve future crisis management efforts.

[\(Susman, n.d.\)](#)

Best Practices to Deploy a Crisis Management Program

- **Develop Clear Protocols:**
 - Establish comprehensive crisis response plans with clearly defined roles and responsibilities for everyone involved, including health care providers, peer support workers, and family members.
 - Ensure that the protocols are accessible and easy to understand by all participants, including the individual in crisis.
- **Training and Education:**
 - Provide regular training for staff, volunteers, and family members on crisis intervention strategies and communication techniques.
 - Include practical simulations or role-play scenarios to ensure all parties are well-prepared.
 - Ensure that everyone is aware of the individual's PAD or crisis plan, if available.
- **Leverage Peer Support:**
 - Incorporate peer support specialists into the crisis management team. Their lived experiences can offer valuable insights and help to de-escalate crisis situations effectively.
 - Encourage individuals in crisis to engage with peer supporters for emotional support and guidance.

[\(Susman, n.d.\)](#)

Best Practices to Deploy a Crisis Management Program Cont.

- **Communication Plan:**
 - Establish a communication plan that ensures clear and calm communication between the individual, family members, and crisis responders.
 - Ensure all parties know whom to contact and how information will be shared during a crisis.
- **Review and Update Regularly:**
 - Periodically review and update the crisis management plan to reflect changes in the individual's needs or preferences.
 - Engage the individual in the process to ensure that the plan remains relevant and effective.
- **Post-Crisis Support:**
 - Offer follow-up support to the individual and their family or support network after the crisis, including counseling, peer support, and recovery resources.
 - Review how the crisis was managed and identify areas for improvement.

[\(Susman, n.d.\)](#)



Training and Education

*Our PAD sessions are based on the
Copeland Center Curriculum.*

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Attending the PAD Course:

- This is a multi-session course that will support us to begin, complete, or revise an advanced directive through a peer support process.
- The course is designed for at least six sessions and can be expanded to support the pace and size of the peer-group.
- Every session is rooted in peer support and sharing on personal wellness.
- We will explore many perspectives and individual insights into what works and does not work for us in a health care crisis and getting support.
- Introduction to the concept of Advance Planning and Peer Support for better health care.
- Identify personal and community benefits to advanced planning.

Attending the PAD Course (Continued)

- We have the human right to direct our lives and how we are cared for.
- We deserve the dignity of choice, self-determination, and the opportunity to learn and grow.
- **There is no evidence that having a disability means we cannot make decisions about our medical treatment and life.**

By integrating these best practices and attending the Peer Supported Advance Directive Course, individuals can better prepare for potential mental health crises and ensure that their preferences are honored.

How to Participate

[Register for the PAD Course](#)



This live workshop has limited seats and will not be recorded.

Register early to secure your spot.

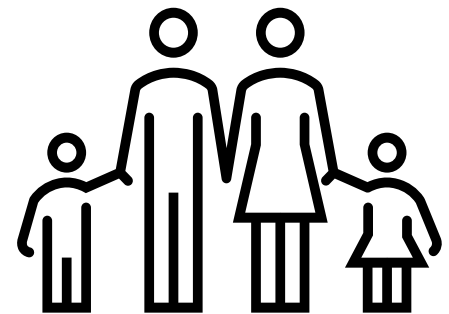
Continuing Education Hours Certificate will be provided.*

Please plan to attend all sessions.

* Please check with your profession's governing board to determine whether this course fulfills the requirements for continuing education units/hours needed for your certification or license.

Join Us in Empowering Our Community

- Together, we can make a difference by ensuring that everyone has the tools to support their mental health.
- Thank you for your time and commitment to wellness.





Questions?

Contact Information

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Thank You

Resources

Video: [Painted Brain on Supported Decision Making 3 \[YouTube\]](#)

National Disability Rights Network: <https://www.ndrn.org/>

SAMHSA has a new app that provides information on PADs as well as state-by-state requirements. Details can be found at <https://attcnetwork.org/news/new-samhsa-smi-adviser-pad-app-is-now-available/>

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