

Note to participants: This packet was prepared for the purpose of the in-person listening sessions being hosted March 20 through March 29, 2023. Elements presented are considered draft until final publication from the Department of Health Care Access and Information (HCAI).

California's Community Health Worker/Promotora/ Representative (CHW/P/R) Certificate Discussion

In-Person Session

*Hosted by California State University Sacramento on
behalf of the Department of Health Care Access and
Information (HCAI)*



Meeting Purpose

- Provide overview on California’s CHW/P/R Certificate Option
 - Receive input from stakeholders on certificate items
- Present next steps for HCAI’s stakeholder engagement process

Agenda

Agenda Item	Notes	Timeframe
Welcome and Station Activity	<ul style="list-style-type: none">• Review Station Instructions for more information.	First 25 minutes of the meeting
Formal Presentation	<ul style="list-style-type: none">• In Large Group• Will cover: Welcome, Meeting Purpose, CHW/P/R Certificate Context and Model Draft, Instructions, Q&A	40-50 minutes
Continuation of Station Activity	<ul style="list-style-type: none">• Review Station Instructions for more information.	40-50 minutes
Wrap Up and Next Steps	<ul style="list-style-type: none">• In Large Group	5 minutes

Station Instructions

Step 1: Before today’s Formal Presentation

- Please read through this packet to orient yourself and get familiar with today’s material.
- When you are ready and have reviewed the material, please begin the Station Activity.

Step 2: During today’s Formal Presentation

- Please follow along with today’s presentation. The presenter will guide you through this packet and explain topics in more detail. There will be time for questions and answers after the presentation.
- When prompted, please begin the Station Activity.

Step 3: Station Activity

There are 5 Stations:

Station 1:
Overview of Draft Model

Station 2:
Training Program Pathway

Station 3:
Legacy Pathway

Station 4:
Renewal Requirements

Station 5:
Specialty Certificate

Each station has two elements. Please visit each Station, review content and provide your input on the form.

Element A:
Review Certificate Model Content

Element B:
Respond to Questions

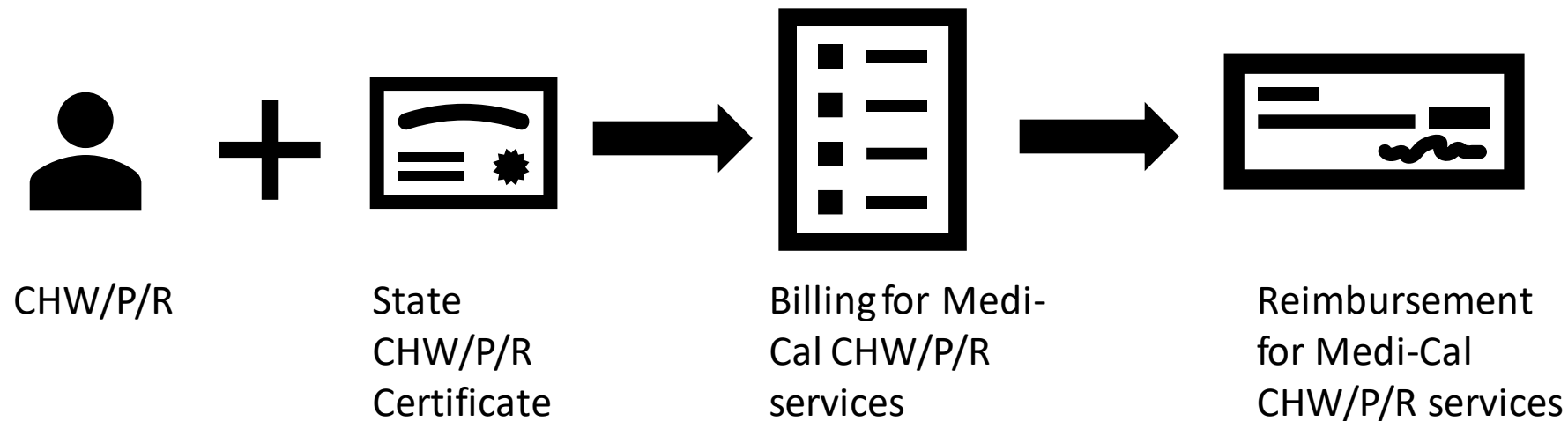
Step 3: Ask for Guidance

If at anytime you would like some assistance or have any questions, please go to the Station 1 for help from event staff. Also, please be sure to provide your written input on the form and leave it with staff before leaving meeting.

State of California-Issued CHW/P/R Certificate: Important Clarifications and Background

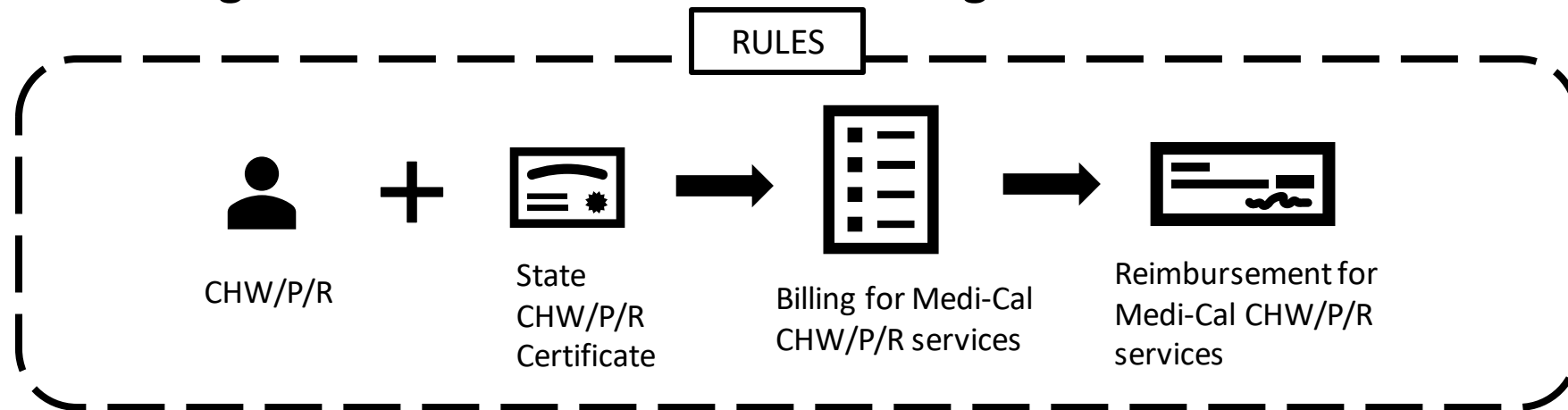
Important Clarifications about the State of California-Issued CHW/P/R Certificate

- The State CHW/P/R Certificate is **only required** to bill Medi-Cal for Medi-Cal reimbursable CHW/P/R services.
- The State CHW/P/R Certificate indicates that an individual has received training and education approved by the state for a CHW/P/R.
- CHW/P/Rs **can** continue to work without the State CHW/P/R Certificate.



Community Health Worker (CHW) services as a Medi-Cal benefit

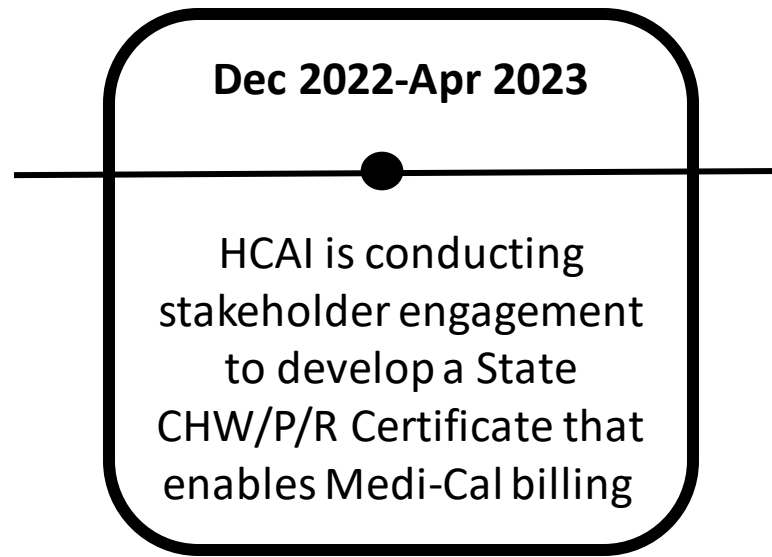
California Legislature and the Administration wanted to provide payment for CHW services through our state's Medi-Cal program. To do so, DHCS, the state's Medi-Cal department, had to define the CHW benefit and create the rules for payment of services including a state-issued certificate through a State Plan Amendment.



For more information on the DHCS Medi-Cal Benefit, please visit:

- [DHCS Community Health Workers Page](#)
- [SPA 22-0001 Approval \(ca.gov\)](#)

Per California statute, HCAI **must develop statewide requirements** for community health worker certificate programs **in consultation with stakeholders.**



Through this stakeholder engagement, stakeholders will help HCAI develop requirements for:

- Self-attestation of lived experience
- CHW/P/R training programs
- Legacy CHW/P/R work experience
- Specialty programs

For more information on the statute and HCAI requirements, please visit:

- [Welfare and Institutions Code](#)

Frequently Asked Questions (1 of 3)

State CHW/P/R Certificate

- **What is the purpose of the State CHW/P/R certificate?**
 - The California Department of Health Care Access and Information (HCAI) is developing the State-Issued CHW/P/R certificate process that can be used to bill the CHW Medi-Cal Benefit, when implemented.
 - The State-Issued CHW/P/R Certificate indicates that an individual has received training and education approved by the state for a CHW/P/R or the individual has the experience demonstrating they possess the core competencies to be a state certified CHW/P/R.
- **Who is the entity authorized to establish a process for the State-Issued CHW/P/R Certificate?**
 - HCAI will be the certifying entity.
- **How will individuals be certified as a CHW/P/R by HCAI?**
 - HCAI will create two pathways to certify individuals as CHW/P/Rs, a Training Pathway and a Legacy Pathway. HCAI will approve CHW/P/R training programs based on requirements developed through the stakeholder engagement process.
 - The Legacy Pathway will provide current CHW/P/Rs with an opportunity to become state certified if they demonstrate they meet the core competencies, outlined in the state requirements under development.
- **Do all CHW/P/Rs need to be certified by HCAI to continue working?**
 - A State-Issued CHW/P/R Certificate is not needed to continue working. the State-Issued CHW/P/R Certificate will demonstrate that the CHW/P/R has the training to bill Medi-Cal for the CHW Medi-Cal Benefit.
- **What is the start date for the State-Issued Certificate?**
 - HCAI expects to begin issuing CHW/P/R certificates in Fall 2023.
- **How much will a State-Issued Certificate cost?**
 - HCAI has clearly heard from stakeholders that the certificate needs to be affordable. HCAI is committed to implementing this stakeholder feedback as we plan for sustainability of the state certification process.

Frequently Asked Questions (2 of 3)

Legacy Pathway

- **What is state certification going to look like for existing CHW/P/Rs - the Legacy Pathway?**
 - The Legacy Pathway will be one of two ways people can receive a State-Issued CHW/P/R certificate. HCAI will seek to ensure the Legacy Pathway is not an unreasonable barrier for currently practicing CHW/P/Rs, but this pathway MUST demonstrate that a legacy CHW/P/R has the core competencies to be a state certified CHW/P/R.
 - HCAI is using stakeholder feedback and information from other states to inform the Legacy Pathway requirements.

Specialty Certificate

- **What areas will the Specialty Certificate cover?**
 - There will be a certificate for specializations of specific groups (e.g., justice-involved, domestic violence survivors, LGBTQ+) that are being determined through stakeholder engagement. We expect to work with training programs that focus on specialization (e.g., Alzheimer's, climate change). The stakeholder engagement process will assist us in identifying priorities for specialized training and developing statewide requirements.
- **Is the Specialty Certificate required for billing for the CHW Medi-Cal Benefit?**
 - No, the Specialty Certificate is an optional add-on to support CHW/P/Rs in working with specific communities and/or to work with individuals with particular health conditions.
- **What does the Specialty Certificate indicate?**
 - The Specialty Certificate indicates that a CHW/P/R has completed additional training that concentrates on specific program focus areas, with learning objectives and topics tailored to the skills required for distinct program and population needs.

Frequently Asked Questions (3 of 3)

HCAI Approved CHW/P/R Training

- **When will HCAI release the requirements for the state certificate of CHW/P/Rs and approving training programs that will train individuals to become state certified CHW/P/Rs?**
 - HCAI will release the requirements for certifying CHW/P/Rs and the requirements for approving training programs in July 2023.
- **How does the state certificate process affect training programs?**
 - Any CHW/P/R wishing to become state certified, unless utilizing the Legacy Pathway, will need to complete an HCAI-approved training program.
- **Will all training materials be presented in multiple languages?**
 - HCAI recognizes the importance of ensuring training materials are in multiple languages. HCAI will approve training programs that provide state-approved CHW/P/R training in multiple languages.
- **What will the requirements for continuing education look like?**
 - HCAI will set a requirement for a minimum of 6 hours of additional relevant training annually. Additional requirements for continuing education will be developed through the stakeholder engagement process.
- **How and when will training programs apply to be approved by HCAI?**
 - HCAI will outreach to known training programs and will also publicize the opportunity for training programs to submit materials on their programs for review. Training program requirements are currently being developed through stakeholder engagement and will be released publicly in July 2023. Submitting training programs who meet these requirements will be approved. HCAI anticipates that the training program submission/approval process will begin in Summer 2023.

Stakeholder Input

- **How are CHW/P/Rs involved in the development of the state certificate process?**
 - HCAI's stakeholder engagement process is meant to bring in the collective experience and voice to the process. HCAI has been delighted to see the high turnout of our stakeholders, including current CHW/P/Rs, who are helping inform the state certificate process.

State of California-Issued CHW/P/R Certificate: DRAFT Model

This draft model is presented for stakeholder feedback.



State-Issued CHW/P/R Certificate: DRAFT Model



State-Issued CHW/P/R Certificate

- ☐ The State CHW/P/R Certificate is *only required* to bill Medi-Cal for reimbursable CHW/P/R services.
- ☐ CHW/P/Rs *can* continue to work without the State CHW/P/R Certificate.
- ☐ 2 Pathways to State CHW/P/R Certificate:
 - Training Program Pathway
 - Legacy Pathway
- ☐ CHW/P/Rs will apply for the State CHW/P/R Certificate online, after meeting the Training Program Pathway or Legacy Pathway requirements



State-Issued CHW/P/R Certificate: Renewal

- ☐ CHW/P/Rs must renew their State CHW/P/R Certificate once every 2 years
- ☐ CHW/P/Rs will apply for renewal online, after completing continuing education requirements



State-Issued Specialty Certificate

- ☐ An *optional* add-on to the State CHW/P/R Certificate (for both Training Program Pathway and Legacy Pathway).
- ☐ NOT required to bill Medi-Cal for Medi-Cal reimbursable CHW/P/R services
- ☐ CHW/P/Rs will apply for the State Specialty Certificate online, after meeting the State Specialty Certificate requirements



State-Issued CHW/P/R Certificate: DRAFT Model

Questions for Stakeholder Feedback:

1. Do you have any questions on this draft outline of the State-Issued CHW/P/R Certificate?



State-Issued CHW/P/R Certificate: Training Program Pathway (DRAFT)



Training Program Pathway Requirements

✓ Self-Attestation of Lived Experience

- The CHW/P/R attests they will provide CHW/P/R services with individuals, communities, populations that align with their lived experience
 - “Lived experience” can be:
 - Personal knowledge of a specific health condition or circumstance
 - Part of someone’s self-identity, such as a member of a race/ethnic community or the LGBTQ+ community

✓ Completion of an HCAI-approved training program, which will provide:

- Minimum 80 hours of training (80 hours must include a minimum of 5 hours of unpaid field experience)
 - Field experience hours are defined as: hours in the field training as a CHW/P/R under supervision
- Curriculum that teaches to core competencies, adopted from C3’s core competencies
- A training team that includes at least one CHW/P/R as a trainer, co-trainer, or other member of the training team
- Assessment of core competencies at the end of the training (test, supervised field experience, or other assessment)
- Support for CHW/P/Rs applying to the certifying entity to receive the State CHW/P/R Certificate

State-Issued CHW/P/R Certificate: Training Program Pathway (DRAFT)

Core Competencies for Training Program Curriculum

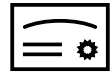
❑ **HCAI-approved training programs will provide curriculum that teaches to the following core competencies (modeled off of C3's core competencies)**

- Communication Skills
- Interpersonal and Relationship Building Skills
- Service Coordination and Navigation Skills
- Capacity Building Skills
- Advocacy Skills
- Education and Facilitation Skills
- Individual and Community Assessment Skills
- Outreach Skills
- Professional Skills and Conduct
- Evaluation and Research Skills
- Knowledge Base (basic knowledge in public health principles and social determinants of health, as determined by the supervising provider)

State-Issued CHW/P/R Certificate: Training Program Pathway (DRAFT)

Questions for Stakeholder Feedback:

- 1. Do you agree with the 80 hours as the minimum training length?**
- 2. Do you agree with the 5 hours of field experience as the minimum training length?**
- 3. Do you agree it is reasonable to require that approved training programs include at least one CHW/P/R as a trainer, co-trainer, or other member of the training team?**
- 4. Please provide any other feedback on the Training Program Pathway model.**



State-Issued CHW/P/R Certificate: Legacy Pathway (DRAFT)



Legacy Pathway Requirements

✓ Self-Attestation of Lived Experience

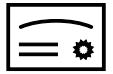
- The CHW/P/R attests they will provide CHW/P/R services with individuals, communities, populations that align with their lived experience
 - “Lived experience” can be:
 - Personal knowledge of a specific health condition or circumstance
 - Part of someone’s self-identity, such as a member of a race/ethnic community or the LGBTQ+ community

✓ 2,000 hours of CHW/P/R work in the past 3 years

- CHW/P/R will submit proof of 2,000 hours of CHW/P/R work (employment or volunteer) in past 3 years

✓ 2 letters of recommendation attesting to CHW/P/R Core Competencies

- CHW/P/R will submit 1 letter of recommendation from Organizational Leader where they have worked or volunteered
- CHW/P/R will submit 1 completed form letter from Direct Supervisor
 - Form letter template will be supplied by certification entity
 - Direct Supervisor will attest to the applicant's competencies in core areas by checking off boxes for each competency and providing signature



State-Issued CHW/P/R Certificate: Legacy Pathway (DRAFT)

Questions for Stakeholder Feedback:

The Legacy Pathway MUST demonstrate that the individual meets the core competencies to receive a State CHW/P/R Certificate. HCAI believes the model, as outlined, meets this standard.

- 1. Do you have any concerns regarding the requirement that CHW/P/Rs submit two letters of recommendation, one from a Direct Supervisor and one from an Organizational Leader?**
 - a) If you do have a concern, do you have another suggestion on how to demonstrate an individual meets the core competencies to receive the State CHW/P/R Certificate?
- 2. Do you have any concerns regarding the requirement that CHW/P/Rs submit documentation on at least 2,000 hours within the past 3 years?**
 - a) If you do have a concern, do you have another suggestion on how to demonstrate an individual meets the core competencies to receive the State CHW/P/R Certificate?
- 3. Please provide any other feedback on the Legacy Pathway model.**

State-Issued CHW/P/R Certificate: Renewal (DRAFT)

Renewal Requirements

- ✓ **CHW/P/R must renew their State CHW/P/R Certificate once every 2 years**
- ✓ **Renewal of Self-Attestation of Lived Experience**
 - The CHW/P/R will again attest that they will provide CHW/P/R services with individuals, communities, populations that align with their lived experience
 - “Lived experience” can be:
 - Personal knowledge of a specific health condition or circumstance
 - Part of someone’s self-identity, such as a member of a race/ethnic community or the LGBTQ+ community
- ✓ **Six hours each year of continuing education, from an HCAI-approved training program.**
All HCAI-approved continuing education training programs will provide:
 - Continuing education focused on:
 - Core competency topics
 - Updates on applicable laws, e.g. changes in Medi-Cal eligibility, and evidence based best practices.
 - Support for CHW/P/Rs applying for renewal of their State CHW/P/R Certificate



State-Issued CHW/P/R Certificate: Renewal

Questions for Stakeholder Feedback:

1. **While all core competencies will be considered for continuing education, pick 3 core competencies that you think should be prioritized.**
 - Communication Skills
 - Interpersonal and Relationship Building Skills
 - Service Coordination and Navigation Skills
 - Capacity Building Skills
 - Advocacy Skills
 - Education and Facilitation Skills
 - Individual and Community Assessment Skills
 - Outreach Skills
 - Professional Skills and Conduct
 - Evaluation and Research Skills
 - Knowledge Base (basic knowledge in public health principles and social determinants of health, as determined by the supervising provider)

2. **Please provide any other feedback on the State CHW/P/R Certificate renewal model.**



State-Issued Specialty Certificate



State-Issued Specialty Certificate Requirements

- ✓ **CHW/P/R meets requirements for State CHW/P/R Certificate**
- ✓ **Completion of HCAI-approved specialty CHW/P/R training program.**
All HCAI-approved specialty training programs will provide:
 - Curriculum in the area of specialization
 - 10 hours of specialty training beyond the 80 hours required for core CHW/P/R training
 - Specialty trainings may be offered with the core CHW/P/R training, or as separate training units
 - CHW/P/Rs using the **Training Program Pathway** can take specialty training(s) with core CHW/P/R training
 - CHW/P/Rs using the **Legacy Pathway** can take specialty trainings that are offered as separate units



State-Issued Specialty Certificate

Questions for Stakeholder Feedback:

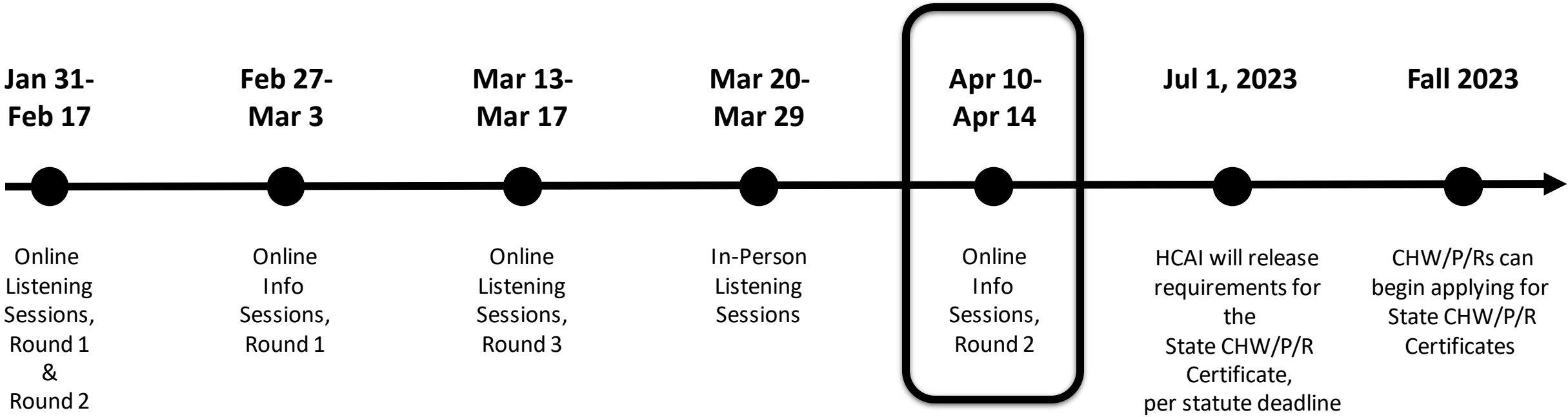
1. While a range of topics will be considered for State Specialty Certificates, pick 3 topics that you think should be prioritized in the two categories listed.
 - **(Conditions):** Alzheimer's and other related dementia, climate impact on health, disability, mental health conditions, substance use, pregnancy, birth, control and prevention of chronic conditions or infectious diseases, behavioral health conditions, and need for preventive services
 - **(Populations):** People in foster system placement, People experiencing homelessness, Justice-Involved Population, LGBTQ+ Community, Military Service Community
 - If your priority topic is not listed, please list the topic.
2. Do you agree with the 10 hours as the minimum training length for each specialty training?
3. Please provide any other feedback on the State Specialty Certificate model.

Wrap Up and Next Steps

Thank you for your participation and feedback!

Please join us for the final engagements: Info Sessions, April 10 – April 14.

Purpose of final Info Sessions: HCAI will share the final State CHW/P/R Certificate model as developed through the full stakeholder engagement process. Please expect invitations via email, in early April.



For questions on this stakeholder engagement process, please reach out to CHW@hcai.ca.gov

Resources

For more information please visit:

- HCAI's Community Health Workers/Promotores/ Representatives (CHW/P/R):
<https://hcai.ca.gov/workforce-capacity/community-health-workers-promotores-chw-p/>
- DHCS Proposal to add Community Health Workers: <https://www.dhcs.ca.gov/community-health-workers>
- State Plan Amendment (SPA) 22-0001: <https://www.dhcs.ca.gov/formsandpubs/laws/Documents/SPA-22-0001-Approval.pdf>