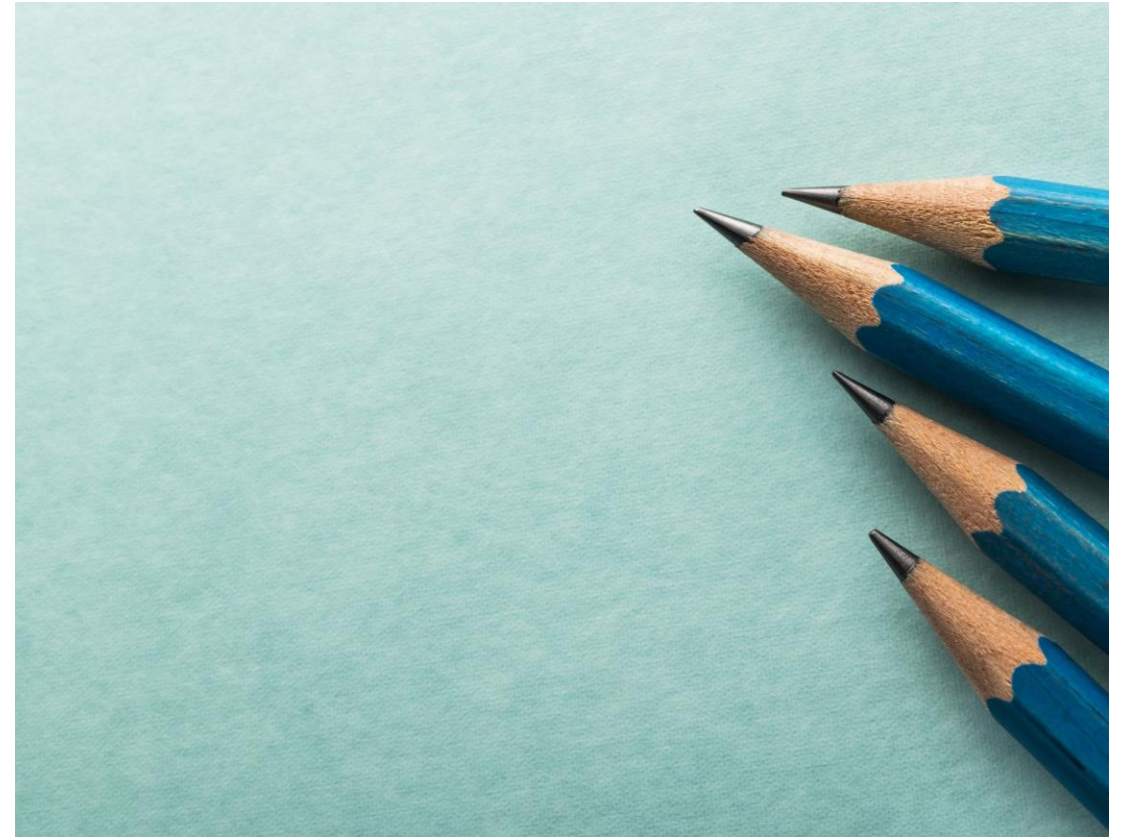


# California's Community Health Worker/Promotora/ Representative (CHW/P/R) Certificate

Online Information Session for CHW/P/Rs  
July 2023

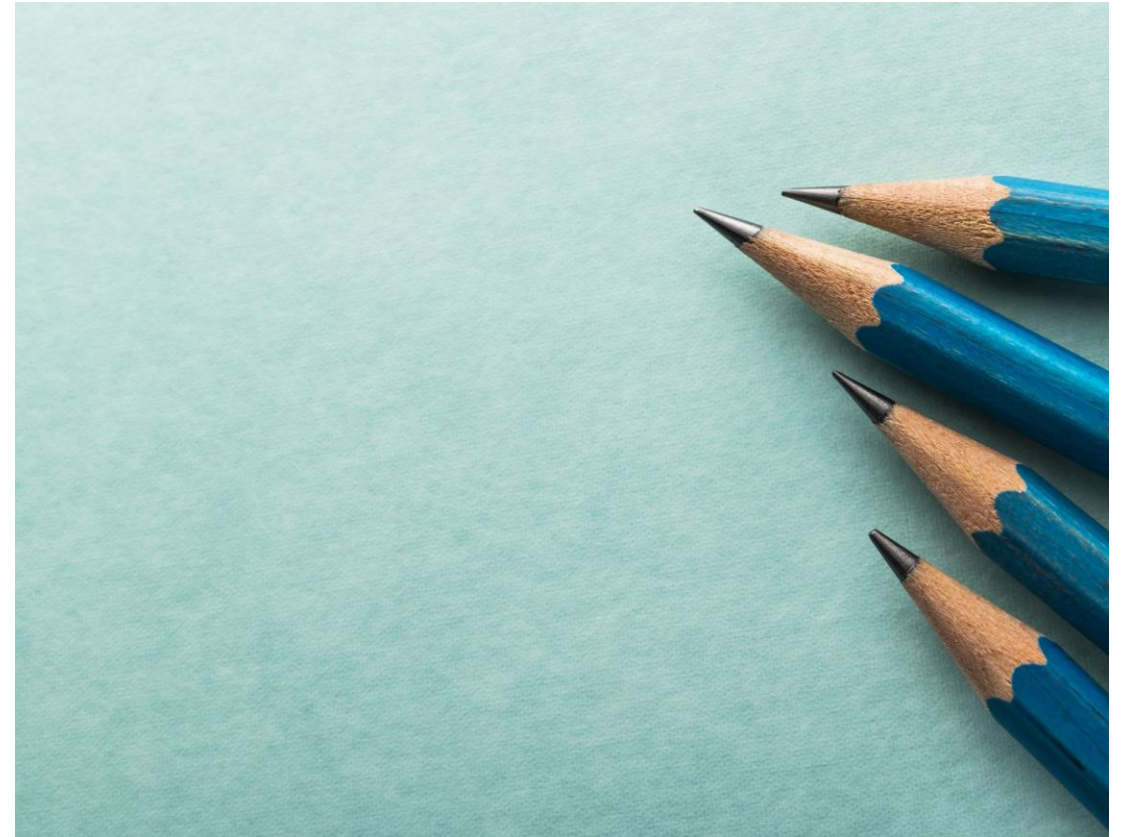
# Agenda

- **Welcome and Meeting Purpose**
- **Overview of HCAI's Guiding Principles and Stakeholder Engagement Process**
- **Overview of HCAI's Finalized CHW/P/R Certificate Model**
- **Next Steps**
- **Q/A Time**



# Meeting Purpose

- This session is intended for CHW/P/Rs.
- HCAI will present the finalized CHW/P/R Certificate Model, as released in the July 1 [Guidance Letter](#), and highlight relevant information for CHW/P/Rs interested in applying for the HCAI CHW/P/R certificate.
- CHW/P/Rs will be able to ask clarifying questions on the finalized model.



# Overview of HCAI's Guiding Principles and Stakeholder Engagement Process

# HCAI's Guiding Principles for the Development of the CHW/P/R Certificate Model

HCAI is committed to ensuring that the certificate process aligns with the [DHCS CHW SPA](#) and the [HCAI Statute](#).

HCAI is committed to being highly responsive to stakeholders. HCAI is committed to centering the voices of Community Health Workers, Promotoras(es), and Representatives. When making final decisions for the model, HCAI considered every opinion voiced through comments, chat, email feedback, and poll data provided to us through stakeholder feedback sessions and our CHWPR email inbox. The decision points in the final model are based on the majority opinion/vote.

# Stakeholder Engagement Summary

December 2022 through May 2023, HCAI worked with stakeholders to develop standards for a state-issued certificate for CHW/P/Rs and for approval of training programs.

- **Stakeholder Engagement Phase 1 (Dec '22-Jan '23):** HCAI completed 41 one-on-one interviews with 26 stakeholder organizations to inform the topics and questions for the next phase of stakeholder engagement.
- **Stakeholder Engagement Phase 2 (Jan '23-May '23):** HCAI hosted 43 sessions with a total attendance of 1,573.

Phase 2 Events	Round 1 Listening Sessions	Round 2 Listening Sessions	Round 1 Info Sessions	Round 3 Listening Sessions	In-Person Listening Events	Round 2 Info Sessions
Dates	Jan 31 - Feb 7	Feb 13 – Feb 17	Feb 27 - Mar 3	Mar 13 - Mar 17	Mar 20 – Apr 25	May 24 - 26
# of Session	13 sessions	10 sessions	3 sessions	6 sessions	7 sessions	4 sessions
Total attendance	141	301	228	176	242	485
Notes	Included <b>Tribal partner</b> session, and <b>English and Spanish</b> sessions specifically designated for active CHW/P/Rs	Included <b>Tribal partner</b> session, and <b>English and Spanish</b> sessions specifically designated for active CHW/P/Rs	All sessions provided <b>live Spanish translation</b>	Included <b>Tribal partner</b> session, and <b>English and Spanish</b> sessions specifically designated for active CHW/P/Rs	Locations: Stockton, Salinas, Eureka, San Diego, San Bernardino, Los Angeles, Oakland  All sessions provided <b>live Spanish translation</b>	3 sessions with <b>live Spanish translation</b>  <b>1 Spanish session</b>

# Overview of HCAI's Finalized CHW/P/R Certificate Model

\*Newest updates from May 2023 Info Session feedback will be shown in a blue box

# State-Issued CHW/P/R Certificate



## State-Issued CHW/P/R Certificate

- ☐ The State CHW/P/R Certificate indicates that a CHW/P/R meets the requirements to bill for Medi-Cal CHW/P/R services.
- ☐ CHW/P/Rs *can* continue to work without the State CHW/P/R Certificate.
- ☐ There are 2 Pathways to State CHW/P/R Certificate:
  - CHW/P/R Experience Pathway (Previously known as “Legacy Pathway”)
  - Training Program Pathway
- ☐ CHW/P/Rs will apply for the State CHW/P/R Certificate online, after meeting the Training Program Pathway or CHW/P/R Experience Pathway requirements.



## State-Issued CHW/P/R Certificate: Renewal

- ☐ CHW/P/Rs must renew their State CHW/P/R Certificate 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 CHW/P/R Experience 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.



## General Information

- ☐ HCAI will NOT collect or require SSN, or proof of immigration status
- ☐ HCAI will allow individuals 16 years and older to apply but will note that Medi-Cal billing has a minimum age requirement of 18.



# CHW/P/R Experience Pathway

(Previously known as “Legacy Pathway”)



# State-Issued CHW/P/R Certificate: CHW/P/R Experience Pathway

## ✓ Self-Attestation of Lived Experience

- The CHW/P/R will attest that they will provide CHW/P/R services with individuals, communities, or 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
  - (Draft example of self-attestation process on next slide)

## ✓ Submission of ONE of the following:

- 2,000 hours (500 of which must be verified) of CHW/P/R work as a volunteer or employee.
  - (Draft example of the verification form on future slide)

**-OR-**

- Prior Certificate of Completion (dated 2019 or later) from an HCAI-approved training program AND proof of at least 10 hours of field experience.
  - (Draft example of the field experience verification form on future slide)

### New Information regarding the CHW/P/R Experience Pathway:

- HCAI has revised the name “Legacy Pathway” to “CHW/P/R Experience Pathway” for better clarity.
- HCAI has added a Reciprocity Policy and a Discretion Policy (more information available on an upcoming slide).
- HCAI will close CHW/P/R Experience Pathway in 2029, but reciprocity and discretion policy will continue indefinitely. HCAI may revisit the decision to close the CHW/P/R Experience Pathway if application volume remains significant as we approach 2029.



## State-Issued CHW/P/R Certificate: CHW/P/R Experience Pathway

### Self-Attestation of Lived Experience

Attestation is defined as an official verification of something as true or authentic. Self-attesting a document allows individuals to verify the document themselves without the help of an outside party.

When CHW/P/Rs apply online to receive the CHW/P/R Certificate, they will self-attest to a statement describing their lived experience.

An initial draft has been included to the right:

I, \_\_\_\_\_, hereby attest that I will provide CHW/P/R services with individuals, communities, or populations that align with my lived experience. Lived experience is defined as one or both of the items below:

- 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

\_\_\_\_\_  
Electronic signature

\_\_\_\_\_  
Date



# State-Issued CHW/P/R Certificate: CHW/P/R Experience Pathway

## Illustrative DRAFT Examples of Potential Verification Forms

### Verification Form for 500 Hours + Core Competencies

Applicant's Full Name: \_\_\_\_\_

Applicant's Start Date: \_\_\_\_\_

Employer/Volunteer Site Name: \_\_\_\_\_

Employer/Volunteer Site Phone #: \_\_\_\_\_

Employer/Volunteer Site Address: \_\_\_\_\_

Applicant's Position at Employer/Volunteer Site: \_\_\_\_\_

# of hours worked/volunteered (must be at least 500): \_\_\_\_\_

Applicant has demonstrated the following competencies (applicant must possess all to qualify for State-Issued CHW/P/R Certificate):

- |   |  |
|---|--|
| <input type="checkbox"/> Communication Skills                           | <input type="checkbox"/> Individual                      |
| <input type="checkbox"/> Interpersonal and Relationship Building Skills | and Community Assessment Skills                          |
| <input type="checkbox"/> Service Coordination and Navigation Skills     | <input type="checkbox"/> Outreach Skills                 |
| <input type="checkbox"/> Capacity Building Skills                       | <input type="checkbox"/> Professional Skills and Conduct |
| <input type="checkbox"/> Advocacy Skills                                | <input type="checkbox"/> Evaluation and Research Skills  |
| <input type="checkbox"/> Education and Facilitation Skills              | <input type="checkbox"/> Knowledge Base                  |

Employer/Volunteer Supervisor Printed Name: \_\_\_\_\_

Employer/Volunteer Supervisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### Verification Form for 10 Hours of Field Experience

Applicant's Full Name: \_\_\_\_\_

Applicant's Start Date: \_\_\_\_\_

Employer/Volunteer Site Name: \_\_\_\_\_

Employer/Volunteer Site Phone #: \_\_\_\_\_

Employer/Volunteer Site Address: \_\_\_\_\_

Applicant's Position at Employer/Volunteer Site: \_\_\_\_\_

# of hours of field experience (must be at least 10 hours): \_\_\_\_\_

Employer/Volunteer Supervisor Printed Name: \_\_\_\_\_

Employer/Volunteer Supervisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_



## State-Issued CHW/P/R Certificate: HCAI's Reciprocity Policy

- CHW/P/Rs coming from another state or country must meet the following requirements to obtain a California-Issued CHW/P/R Certificate:
  1. Self-Attestation of lived experience
  2. Submit a certificate of completion from a CHW/P/R training program from another state or country demonstrating that they have completed a training to work as a CHW/P/R a. The certificate of completion must have been issued no earlier than five years from the application date.
  3. Submit proof of completing at least 10 hours of field experience (supervised CHW/P/R work in the field).
- This policy will remain indefinitely.



## State-Issued CHW/P/R Certificate: HCAI's Discretion Policy

- “Discretion” means that HCAI will maintain the freedom to decide what should be done in situations where an existing CHW/P/R cannot meet the requirements for the CHW/P/R Experience Pathway or Reciprocity Policy for reasons beyond their control.
- HCAI, at its discretion, will review information (including, but not limited to, personal statements, testimonials and evidence of CHW/P/R work performed) submitted by the CHW/P/R. At its discretion, HCAI will consider whether to award a state-issued CHW/P/R Certificate to the individual based on their unique circumstances and the information they offer to demonstrate they possess the core competencies to work as a CHW/P/R.
- This policy will remain indefinitely.

# Clarifying Questions Regarding: CHW/P/R Experience Pathway

# Training Pathway





## State-Issued CHW/P/R Certificate: Training Program Pathway

### ✓ **Self-Attestation of Lived Experience**

- **The CHW/P/R attests they will provide CHW/P/R services with individuals, communities, or 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:**

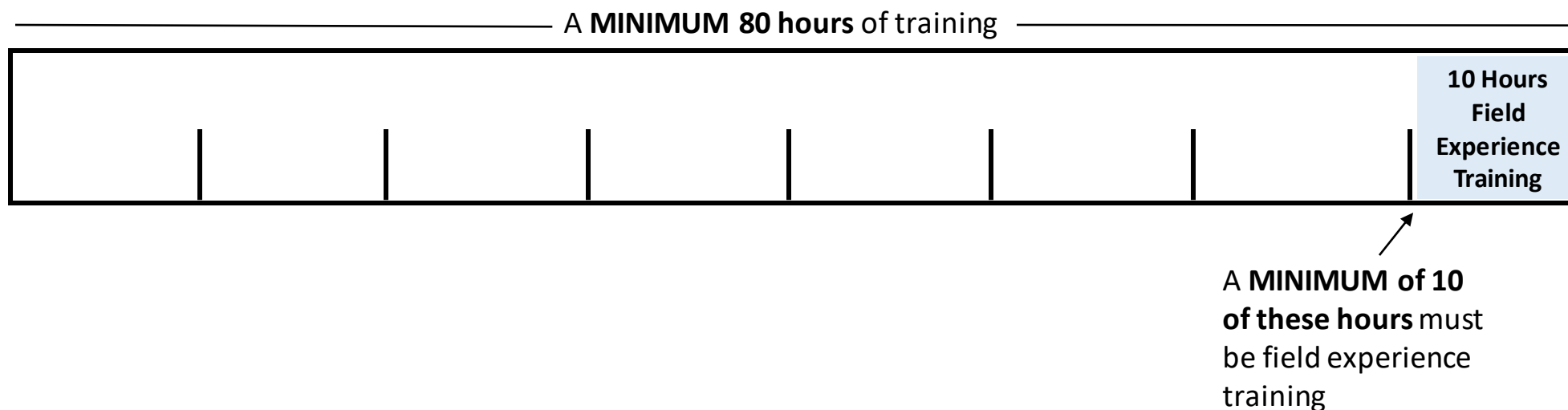
- **At least 80 hours of training (80 hours must include a minimum of 10 hours of field experience)**
  - See next slide for additional details.
- **Curriculum that teaches to core competencies, adopted from C3’s core competencies.**
  - See future slide for list of C3 Competencies.
- **A training team 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

### Additional Details on Training Hours /Field Experience Training Hours

- Field experience training hours are defined as: supervised hours in the field, training as a CHW/P/R.
- Training programs are required to offer the field experience training hours. However, if a trainee chooses, they can complete their field experience hours through their employer. Field experience hours may be unpaid, unless provided by the CHW/P/R's current employer.
- The minimum of 10 hours of field experience will be completed **within** the minimum of 80 hours of training.





## State-Issued CHW/P/R Certificate: Training Program Pathway

### Core Competencies for Training Program Curriculum

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

# Clarifying Questions Regarding: Training Pathway

# Renewal Model



## State-Issued CHW/P/R Certificate: Renewal

- ✓ **CHW/P/R must renew their State CHW/P/R Certificate every 2 years.**
  
- ✓ **CHW/P/Rs must complete 6 hours each year of continuing education, from an HCAI-approved training program or employer/volunteer site.**
  - (Draft example of the verification form on the next slide).
  - Training Programs must provide support for CHW/P/Rs applying for renewal of their State CHW/P/R Certificate.
  
- ✓ **Acceptable topics for continuing education hours:**
  - Core competency topics
  - Updates on applicable laws (e.g., changes in Medi-Cal eligibility) and evidence based best practices.
  - HCAI-approved specialty training program hours



# State-Issued CHW/P/R Certificate: Renewal

## Illustrative DRAFT Example of Potential Verification Form

### Verification Form for Continuing Education Hours

Applicant's Full Name: \_\_\_\_\_

Name of Continuing Education Provider: \_\_\_\_\_

Continuing Education Provider Phone #: \_\_\_\_\_

Continuing Education Provider Site Address: \_\_\_\_\_

\_\_\_\_ hours of continuing education completed in the year 20\_\_\_\_

\_\_\_\_ hours of continuing education completed in the year 20\_\_\_\_

Continuing Education was provided in the area(s) of:

- |   |   |
|---|---|
| <input type="checkbox"/> Communication Skills   | <input type="checkbox"/> Individual and Community Assessment Skills |
| <input type="checkbox"/> Interpersonal and Relationship Building Skills   | <input type="checkbox"/> Outreach Skills                            |
| <input type="checkbox"/> Service Coordination and Navigation Skills   | <input type="checkbox"/> Professional Skills and Conduct            |
| <input type="checkbox"/> Capacity Building Skills   | <input type="checkbox"/> Evaluation and Research Skills             |
| <input type="checkbox"/> Advocacy Skills  | <input type="checkbox"/> Knowledge Base                             |
| <input type="checkbox"/> Education and Facilitation Skills  |   |
| <input type="checkbox"/> Updates on applicable policies (e.g., changes in Medi-Cal eligibility) and evidence based best practices |   |
| <input type="checkbox"/> HCAI-Approve Specialty Training Program  |   |

Supervisor Printed Name: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# Clarifying Questions Regarding: Renewal Model



# Specialty Model



## State-Issued Specialty Certificate

- ✓ **CHW/P/Rs must meet requirements for the core State CHW/P/R Certificate to secure a Specialty Certificate.**
- ✓ **CHW/P/Rs must complete an HCAI-approved specialty training program. The programs may be offered by, or in partnership with, HCAI-approved core CHW/P/R training programs only.**

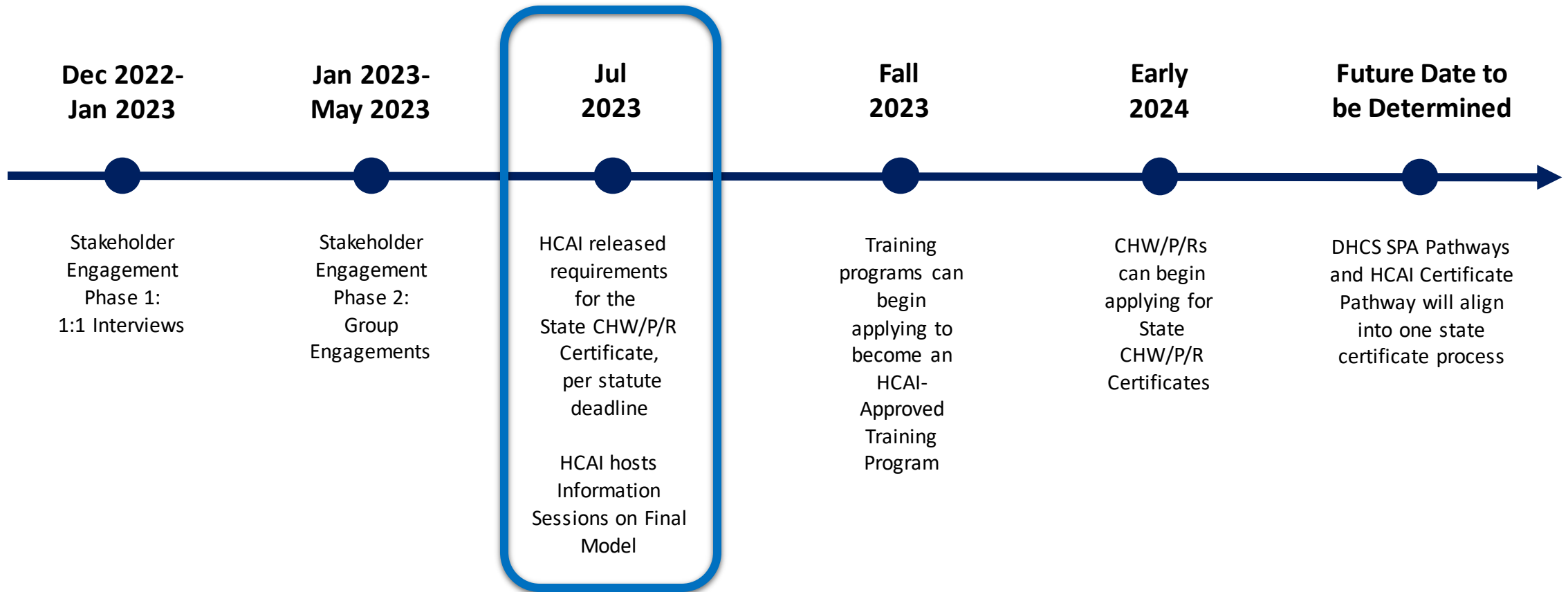
### **Specialty training programs will provide:**

- At least 10 hours of specialty training, in addition to the 80 training hours required for the core CHW/P/R Certificate.
- Specialty curriculum that has been approved by expert(s) within the specialty area, such as a state department or other expert organization.
- Specialty trainings may be offered with the core CHW/P/R Certificate training, or as separate training units.

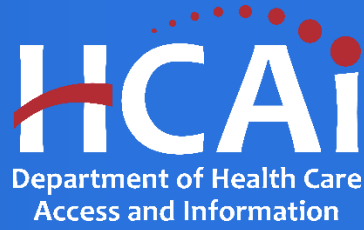
# Clarifying Questions Regarding: Specialty Model

# Next Steps

# CHW/P/R Certificate Timeline



# Questions and Answers



# Contact Information

To contact HCAI regarding the CHW/P/R certificate,  
please email [CHW@hcai.ca.gov](mailto:CHW@hcai.ca.gov)