

Meeting Instructions

- ✓ **Please mute yourself.** On the phone use *6 to mute/unmute.
- ✓ **If your internet connection is not stable, please join with a phone (for audio) and your computer (for video).** Join online via the Zoom link and then opt to join via phone audio. When you are dialing in, please be sure to enter your participant ID. Here is a step-by-step guide to help: <https://support.zoom.us/hc/en-us/articles/201362663-Joining-a-meeting-by-phone>
- ✓ **Rename yourself after logging into Zoom.** Hover over your name in the “Participants” tab and change to: First name, Last Name, Affiliation; Ex. “Jane Smith, Albany High School)”
- ✓ **Comments or questions for HCAI can be shared in the chat function.** Chat messages will only go to hosts.
- ✓ **To choose language:**
 1. Select “Interpretation” in your Zoom controls
 2. Select the language that you would like to hear**NOTE:** To hear the interpreted language only, click Mute Original Audio.

Instrucciones

- ✓ **Por favor, desactive su micrófono.** Si está al teléfono, utilice *6 para silenciarlo/desilenciarlo.
- ✓ **Si sabe que su conexión a Internet no es óptima, le recomendamos que se conecte tanto por teléfono (para el audio) como por su computadora (para el vídeo).** Puede hacerlo uniéndose a la reunión en línea a través del enlace Zoom y optando por unirse a través del audio telefónico. Cuando marque, asegúrese de introducir su número de identificación de participante. Aquí tiene una guía paso a paso que le ayudará: <https://support.zoom.us/hc/enus/articles/201362663-Joining-a-meeting-by-phone>
- ✓ **Cambie su nombre después de entrar en el Zoom.** Pase el cursor sobre su nombre en la pestaña "Participants". Cambie su nombre por Nombre, Apellido, Afiliación; Ej. "Jane Smith, Albany High School)"
- ✓ **Los mensajes de los chats sólo llegarán a los moderadores.**
- ✓ **Por favor, dirija cualquier comentario o pregunta para HCAI en la función de chat a los moderadores.**
- ✓ **Para elegir idioma,**
 1. En los controles de Zoom, haga clic en "Interpretation"
 2. Haga clic en el idioma que desea escuchar.
 3. **NOTA:** Para escuchar sólo el idioma interpretado, haga clic en "Mute Original Audio."

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

Online Information Session

May 24 to May 26, 2023



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

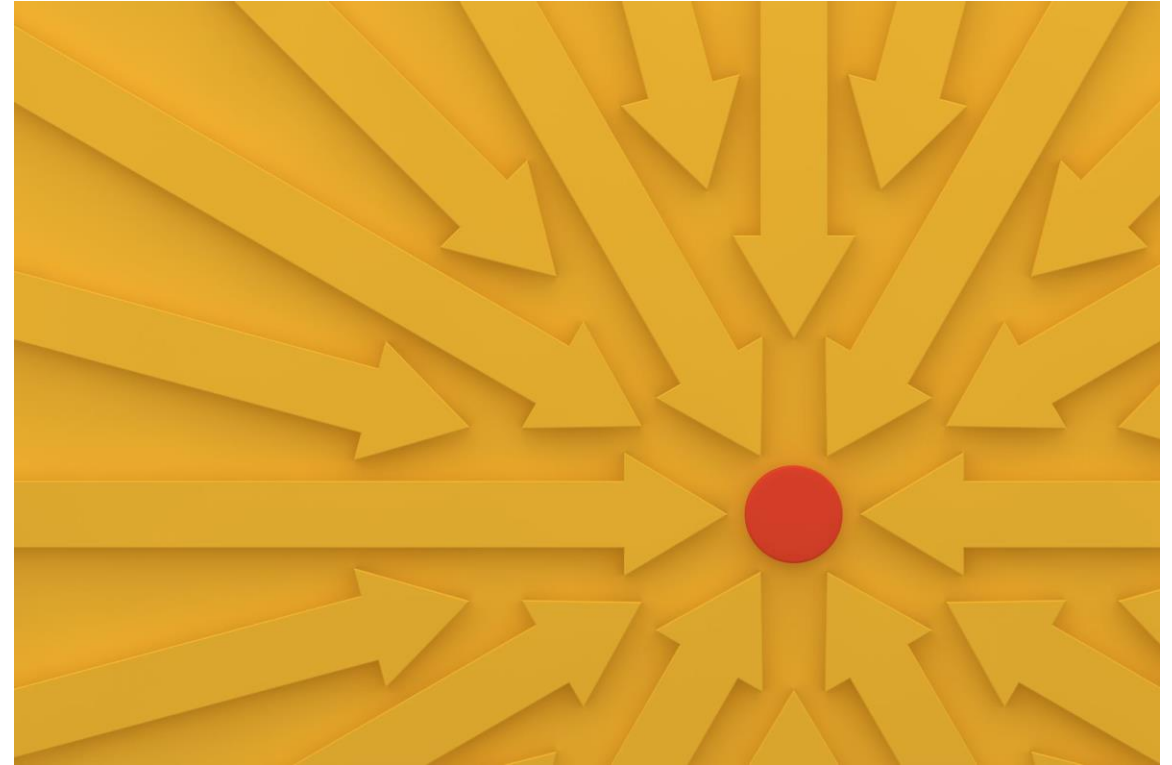
Note: For the purposes of stakeholder engagement, we will be using the term CHW/P/R to describe this workforce.

Meeting Purpose

- HCAI to present the current CHW/P/R Certificate Model, with updates based on stakeholder input.
- Present next steps for HCAI's implementation of the certificate process.

Reminders:

- This meeting will be recorded.
- Notes will be taken throughout the information session.



Agenda

- **Welcome and Meeting Purpose**
- **Who is in the Room**
- **CHW/P/R Certificate Context**
- **Updated Certificate Model and Insights from Listening Sessions**
- **Open Q&A**
- **Wrap Up and Next Steps**



Please feel free to ask questions and share input as you hear insights in the chat. We will compile all feedback!

Who is in the room?

In the chat, let us know:

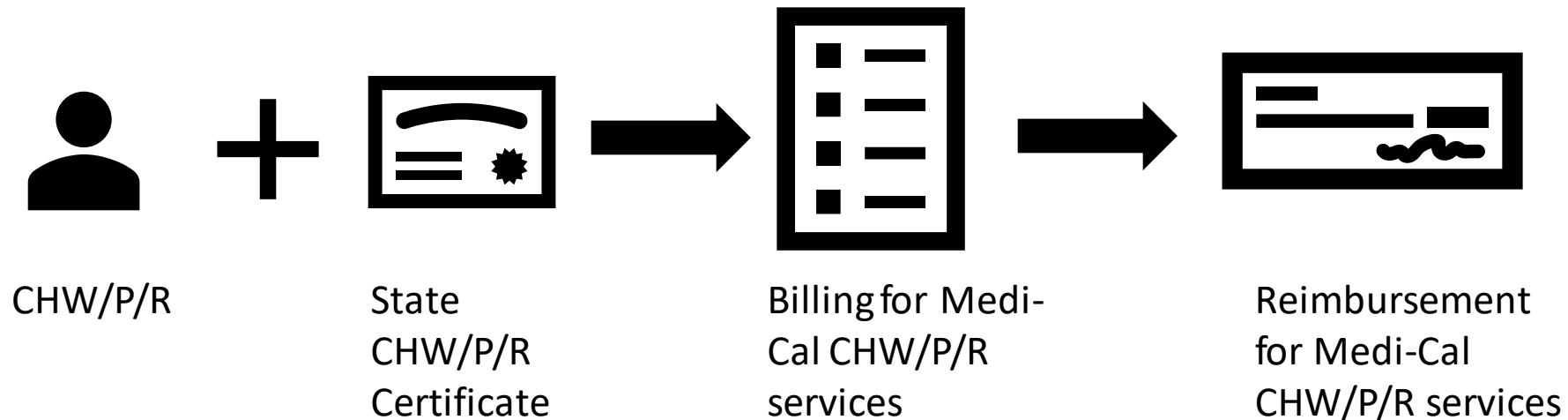
- Your name
- Your organization
- Your role
- What brings you to the information session today



CHW/P/R Certificate Context

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

- The State CHW/P/R Certificate indicates that the individual has the core competencies 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.



Updated Certificate Model

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



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:
 - 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 Legacy 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 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.



Topic: Legacy Pathway

We Presented

- **Self-Attestation of Lived Experience**
- **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.

We Heard

On 2,000 hours

- Many concerns that 2,000 hours in the last 3 years is too much.
- Many felt there may be difficulty attaining proof for all hours, especially from employers or volunteer programs that no longer exist; flexibility is desired by many.

On letters of recommendation

- Many felt there may be challenges getting 2 letters from previous employers or volunteer programs.

Overall Considerations

- Many CHW/P/Rs have completed other training programs.
- Process must be low barrier while also upholding the quality of work and preparation expected for CHW/P/Rs.

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

✓ 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 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)

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

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: Legacy Pathway (UPDATED DRAFT)

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 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 Skills |
| <input type="checkbox"/> Education and Facilitation Skills | |

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: _____

Topic: Training Pathway

We Presented

- **Self-Attestation of Lived Experience**
- **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.

We Heard

On 80 hours

- Majority of stakeholders supported 80 hours of training.
- Some concern that 80 hours may not cover all competencies.

On 5 Field Experience hours

- Many felt 5 hours was too few hours to demonstrate CHW/P/R readiness, but some expressed concerns that may be a burden if too many hours are required.

On who will support the Field Experience Hours Requirement

- Individuals should be able to complete field experience hours with their employers if they choose, concerns about creating a bottleneck where trainees can't find a field placement opportunity.



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

✓ 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:

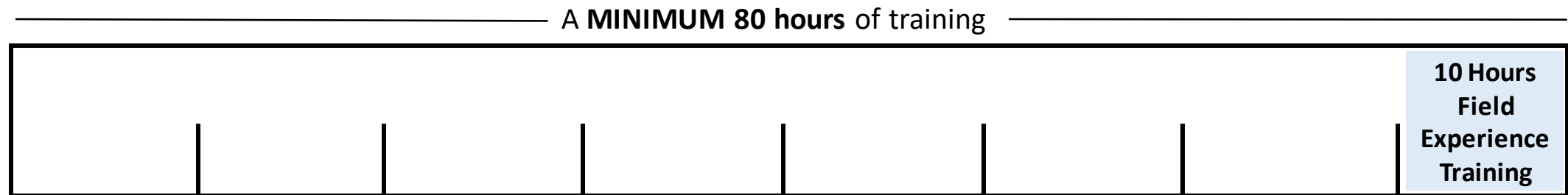
- At least 80 hours of training (80 hours must include a minimum of 10 hours of field experience)
 - See next slide for additional details.
- Curriculum that teaches to core competencies, adopted from C3’s core competencies.
 - See future slide for list of C3 Competencies.
- A training team that includes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

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.



A **MINIMUM of 10 of these hours** must be field experience training



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

Topic: Renewal

We Presented

- CHW/P/R must renew their State CHW/P/R Certificate once every 2 years.
- Renewal of Self-Attestation of Lived Experience.
- 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.

We Heard

On Self-Attestation of Lived Experience

- Most saw no value to renewing self-attestation of lived experience.

Continuing Education by HCAI-approved training programs

- Some suggested employers should also be allowed to provide continuing education to address concerns on costs and access to continuing education.
- Some training programs are concerned with the request that their programs support fulfillment of renewal requirements.

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

- ✓ **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.



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

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 |
| <input type="checkbox"/> Interpersonal and Relationship Building Skills | <input type="checkbox"/> 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 |
| <input type="checkbox"/> Updates on applicable laws, e.g. changes in Medi-Cal eligibility, and evidence based best practices. | |

Supervisor Printed Name: _____

Supervisor Signature: _____

Date: _____



Topic: Specialty

We Presented

- 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.

We Heard

On Hours

- There were only a few voices that were concerned with the 10 hours.
- Some felt the specialty certificate model should have a minimum of hours with the expectation that more hours may be needed for certain specialty topics or subjects.

On Topics

- HCAI suggested many specialty topics and there was some level of support for all topics:
 - "Conditions" receiving highest priority votes were: mental health conditions, control and prevention of chronic conditions or infectious diseases, substance use, disability.
 - "Special populations" receiving highest priority votes were: people experiencing homelessness, the justice-involved population, the foster care population, and the LGBTQ+ community.



State-Issued Specialty Certificate (UPDATED DRAFT)

- ✓ **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.

Q&A

- **Please use the "raise hand" feature to offer comments and questions verbally**
- **Please use the chat feature to offer written comments and questions**
- **All comments and questions in the chat will be recorded and shared with HCAI**

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



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.
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- ☐ 2 Pathways to State CHW/P/R Certificate:
 - Legacy Pathway
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- ☐ 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 every 2 years.
- ☐ CHW/P/Rs will apply for renewal online, after completing continuing education requirements.

Note to CSUS: Please show this slide during Q&A for participants' visual reference



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.



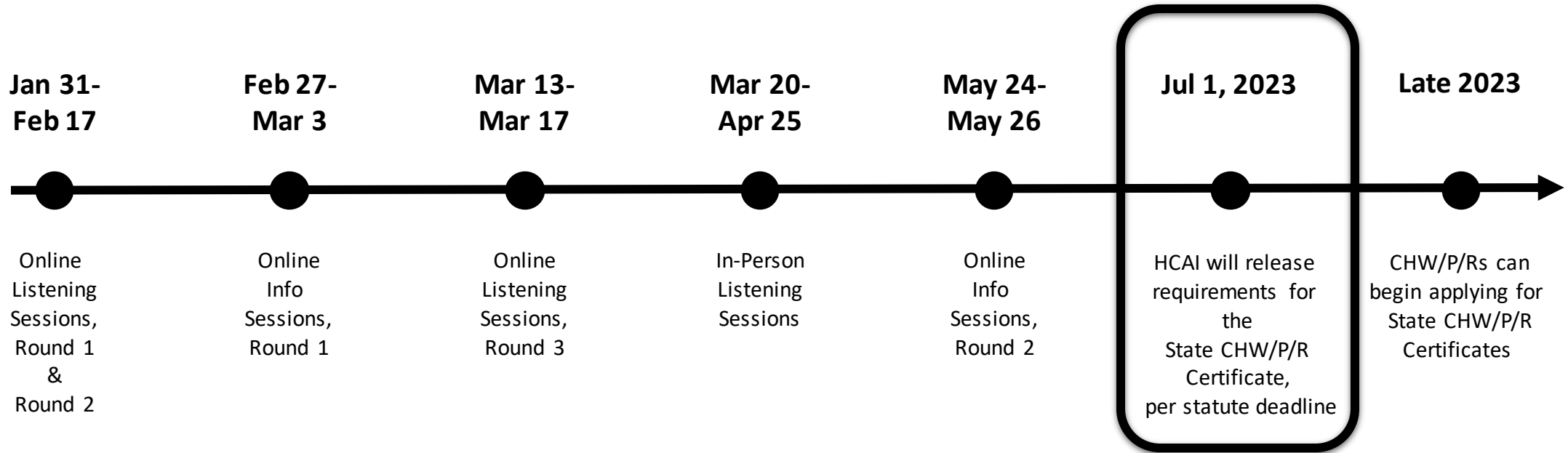
Wrap Up, Next Steps, Future Considerations

Future Considerations and Plans

- **Funding Updates:**
 - The Governor's Proposed Budget continues to recommend delaying \$123 million in funding for CHW/P/R training and training programs until July 2024 through June 2026. We will update stakeholders on HCAI's CHW/P/R webpage when the final budget is approved.
- **Training Program Approval Plans:**
 - **Summer 2023, Outreach/Marketing to Programs:**
 - HCAI plans to begin outreach to known CHW/P/R training programs in Summer of 2023, to make them aware of the opportunity and requirements to submit their programs for approval. HCAI will also post the information and requirements for approval on our CHW/P/R webpage.
 - **Fall 2023, Approval of Programs:**
 - HCAI will be approving programs in Fall 2023
 - **Late 2023, Launch Certificate Process:**
 - At launch, HCAI will list approved training programs on the State CHW/P/R Certificate website.
- **HCAI looks forward to continuing stakeholder conversations on some upcoming items:**
 - Ensuring CHW/P/Rs throughout California are aware of the new State-Issued CHW/P/R Certificate opportunity
 - Ongoing conversation on approval process for core and specialty training programs
 - How best to support funding training programs

Wrap Up and Next Steps

Thank you for your participation and feedback!



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>