

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

Online Information Session for CHW/P/R Training Programs 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 Training Program representatives.
- HCAI will present the finalized CHW/P/R Certificate Model, as released in the July 1 <u>Guidance Letter</u>, and highlight relevant information for Training Programs.
- Training Program representatives 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 <u>DHCS CHW SPA</u> and the <u>HCAI Statute</u>.

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. 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 attendnce	141	301	228	176	242	485
Notes	Included <b>Tribal</b> <b>partner</b> session, and <b>English and</b> <b>Spanish</b> sessions specifically designated for active CHW/P/Rs	Included <b>Tribal</b> <b>partner</b> session, and <b>English and</b> <b>Spanish sessions</b> specifically designated for active CHW/P/Rs	All sessions provided <b>live</b> <b>Spanish</b> <b>translation</b>	Included <b>Tribal</b> <b>partner</b> session, and <b>English and</b> <b>Spanish sessions</b> 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 live Spanish translation 1 Spanish session



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



### 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:
  - o 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.



# **Training Pathway:** Relevant Information for Training Programs (1 of 3)

- CHW/P/Rs must complete an HCAI-approved training program, in order to receive a state-issued CHW/P/R certificate. Requirements to become an HCAI-approved training program are on the next slide.
- No later than fall 2023, HCAI will release the process for programs to become an HCAI-approved CHW/P/R training program.



# **Training Pathway:**

# Relevant Information for Training Programs (2 of 3)

# To be an HCAI-approved CHW/P/R training program, the training program must apply for approval. Programs must include the following <u>minimum</u> requirements:

- 1. Provide a minimum of 80 total hours of CHW/P/R training for each training cohort.
  - a) Model the curriculum after the <u>Community Health Worker Core Consensus Project (C3)</u> to teach the skills necessary for trainees to receive the state-issued CHW/P/R Certificate.
- 2. Include at least one former or current CHW/P/R on the training team.
  - a) CHW/P/R trainers must be actively involved with, and directly teaching CHW/P/R trainees. To secure approval, the training program will provide details on how the CHW/P/R trainer participates in the training program.
  - b) If a training program meaningfully integrates CHW/P/Rs into their CHW/P/R training program in another manner, training programs must detail this meaningful integration and HCAI will determine, at its discretion, whether the information is sufficient to approve the program.
- 3. Include a minimum of ten hours of field experience in the training curriculum.
  - a) The field experience hours are included in the minimum 80 hours of training. If the training program cannot teach all the core competencies to work as a CHW/P/R and conduct the field experience within the minimum 80-hour timeframe, the training program must increase the overall number of training hours.
- 4. Ensure each trainee takes a core competency assessment at the end of the training.
  - a) The assessment can be a test, supervised field experience, or other method of assessing that the trainee has gained the core competencies to be a CHW/P/R.
- 5. Provide support in the form of technical assistance for trainees to apply for the state-issued CHW/P/R Certificate.



# **Training Pathway:** Relevant Information for Training Programs (3 of 3)

No later than fall 2023, HCAI will release the process for programs to become an HCAI-approved CHW/P/R training program.

#### Currently, preliminary information on the application/approval process is as follows:

- Programs will apply via an online application to be hosted on the HCAI website.
- Programs will be asked multiple questions about meeting the minimum qualifications. Programs will also be asked to upload or otherwise provide HCAI with access to program curriculum, assessment tools and other materials for HCAI's review purposes.
- Once approved, HCAI will publish information about the CHW/P/R training programs on its certification website (launching in early 2024), including
  - total number of training hours including hours of field experience required,
  - program site information, whether programs are offered online,
  - cost of training programs, training in non-English languages,
  - and other information to assist CHW/P/R trainees in selecting an appropriate CHW/P/R training program.
- HCAI aims to provide CHW/P/R trainees with information about their training options. HCAI will not publish program training curriculum. The application will indicate which information will be posted on HCAI's certification website.



Clarifying Questions Regarding: Training Program Requirements and Application Process



# **CHW/P/R Experience Pathway:** Relevant Information for Training Programs

- HCAI will accept a Prior Certificate of Completion (dated 2019 or later) from an HCAI-approved training program in place of documentation of work experience hours.
- HCAI has established a Discretion Policy for 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.



# **Renewal Model:**

### Relevant Information for Training Programs (1 of 2)

CHW/P/Rs are required to take six hours of continuing education each year in order to qualify for renewal of the CHW/P/R certificate.

Yearly CHW/P/R continuing education training must consist of a minimum of six training hours with the education topics focused on CHW/P/R core competencies, updates on applicable Medi-Cal policies, or CHW/P/R evidence-based/community-defined best practices.

#### HCAI encourages HCAI-approved CHW/P/R training programs to offer CHW/P/R continuing education training.

Training Programs will **not** need to submit continuing education curriculum to HCAI for approval, but programs will need to complete trainees' "Verification Form for Continuing Education Hours" and identify the topic(s) covered for the individual's hours. (Illustrative draft example of verification form on next slide.)

Training Programs must provide technical support for trainees to apply for the CHW/P/R certificate renewal.



## **Renewal Model:**

## Relevant Information for Training Programs (2 of 2)

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 yea hours of continuing education completed in the yea	  ur 20					
<ul> <li>Continuing Education was provided in the area(s) of:</li> <li>Communication Skills</li> <li>Interpersonal and Relationship Building Skills</li> <li>Service Coordination and Navigation Skills</li> <li>Capacity Building Skills</li> <li>Advocacy Skills</li> <li>Education and Facilitation Skills</li> <li>Updates on applicable policies (e.g., changes in N HCAI-Approve Specialty Training Program</li> </ul>	<ul> <li>Individual and Community Assessment Skills</li> <li>Outreach Skills</li> <li>Professional Skills and Conduct</li> <li>Evaluation and Research Skills</li> <li>Knowledge Base</li> <li>Medi-Cal eligibility) and evidence based best practices</li> </ul>					
Supervisor Printed Name: Supervisor Signature: Date:						



# **Specialty Model:** Relevant Information for Training Programs (1 of 2)

In 2024, HCAI will release the process for programs to become an HCAI-approved Specialty Certificate training program.

To be an HCAI-approved Specialty Certificate training program, the training program must do the following:

- 1. Be an HCAI-approved CHW/P/R training program or partner with an HCAI-approved CHW/P/R Training Program to provide the Specialty Certificate training.
- 2. Apply to HCAI for approval of the Specialty Certificate The Specialty Certificate training curriculum must meet the following requirements:
  - 1. Provide a minimum of 10 hours of training in the specialized area.
  - 2. Attest that the Specialty Certificate training curriculum is appropriate for training CHW/P/Rs.
- 3. Provide training with learning objectives and topics tailored to developing skills in any of the following general areas:
  - a) Preventive health issues (e.g., preventive dental or mental health care);
  - b) Working with subgroups of marginalized communities (e.g., immigrants with substance use disorders or with Alzheimer's); and/or
  - c) Working in distinct program areas relevant to underserved communities (e.g., climate change or violence prevention).
- 4. Receive approval from experts within the specialized field. Experts, include but are not limited to, state and local governmental entities that oversee the specialized area, health provider associations providing care in the specialty area, community-based organizations with a mission to promote or advance the specialized area.
- 5. Provide technical support for trainees to apply for the Specialty CHW/P/R Certificate.



# **Specialty Model:** Relevant Information for Training Programs (2 of 2)

The training program may provide specialty training as part of an HCAI-approved CHW/P/R Certificate training program. An individual will receive a state-issued CHW/P/R Certificate and a Specialty Certificate if they complete a training for both certificates.

An HCAI-approved training program that incorporates both the CHW/P/R Certificate training and the Specialty Certificate training must offer a minimum of 10 hours additional training beyond the required minimum 80 hours for the state-issued CHW/P/R Certificate.

HCAI may delegate its authority to approve Specialty Certificate training programs to other state departments under the Health and Human Services Agency for specializations within the other state department's area of expertise. The department(s) will ensure all requirements for a HCAI-approved Specialty Certificate training program are met.



# Next Steps



# CHW/P/R Training Program Approval Timeline





# **Questions and Answers**





# **Contact Information**

### To contact HCAI regarding the CHW/P/R certificate, please email <u>CHW@hcai.ca.gov</u>



## Appendix: Finalized CHW/P/R Certificate Model Slides as Presented to CHW/P/Rs in July 2023 CHW/P/R Info Sessions

# 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:
  - o 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)

#### $\checkmark$ Submission of <u>ONE</u> 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

Date:

Applicant's Full Name:				
	Communication Skills		Individual	
	Interpersonal and		and Community	
	Relationship Building		Assessment Skills	
	Skills		Outreach Skills	
	Service Coordination and		Professional Skills	
	Navigation Skills		and Conduct	
	Capacity Building Skills		Evaluation and	
	Advocacy Skills		Research Skills	
	Education and Facilitation Skills		Knowledge Base	
Employer/Volunteer Supervisor Printed Name: Employer/Volunteer Supervisor Signature:				

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

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- 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.



# **Training Pathway**



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

#### ✓ Self-Attestation of Lived Experience

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- 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:

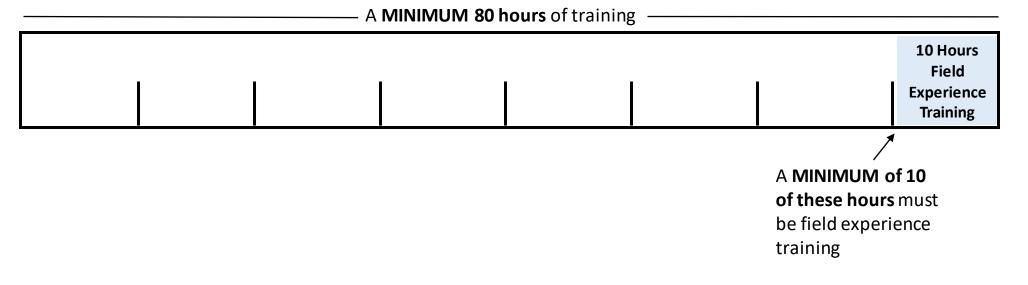
- At least 80 hours of training (80 hours must include a minimum of 10 hours of field experience)
  - See next slide for additional details.
- Curriculum that teaches to core competencies, adopted from C3's core competencies.
  - See future slide for list of C3 Competencies.
- A training team that includes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



# **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

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- 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

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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 hours of continuing education completed in the year	 r 20					
<ul> <li>Continuing Education was provided in the area(s) of:</li> <li>Communication Skills</li> <li>Interpersonal and Relationship Building Skills</li> <li>Service Coordination and Navigation Skills</li> <li>Capacity Building Skills</li> <li>Advocacy Skills</li> <li>Education and Facilitation Skills</li> <li>Updates on applicable policies (e.g., changes in N HCAI-Approve Specialty Training Program</li> </ul>	<ul> <li>Individual and Community Assessment Skills</li> <li>Outreach Skills</li> <li>Professional Skills and Conduct</li> <li>Evaluation and Research Skills</li> <li>Knowledge Base</li> </ul>					
Supervisor Printed Name: Supervisor Signature: Date:						



# Specialty Model





- ✓ 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.



# CHW/P/R Certificate Timeline

