

# HCAI-Certified Wellness Coach Employer Support Grant Program Webinar

August 8, 2024



# Introductions and Agenda

Christopher Roina, HCAI Health Workforce, Operations Section

# Introduction and Housekeeping

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1. Our webinar is hosted in Microsoft Teams, if you're not familiar with the platform, you can find the view controls and chat feature in the menu bar at the top of your screens.
2. The webinar will be recorded and shared with grantees in approximately 7-10 business days.
3. Today, the chat option will be open for asking questions during the Q&A session which is at the end of this webinar. HCAI will develop an FAQ document to address any unanswered questions.
4. Today's webinar will focus only on the HCAI-Certified Wellness Coach Employer Support Grant program details.

# Agenda

**Housekeeping and Introductions:** Christopher Roina, HCAI Health Workforce, Operations Section

**Opening Remarks:** Dr. Sharmil Shah, HCAI Health Workforce Assistant Deputy Director

**Certification, Recruitment, and Employment of CWCs:** Ben Gamache, HCAI Health Workforce, Policy Section

**Grants Technical Assistance:** Michelle Crouch, HCAI Health Workforce Grants Section  
Jessica Fifield, HCAI Health Workforce Research and Evaluation

**Questions & Answers:** Christopher Roina, HCAI Health Workforce, Operations Section

**Closing Remarks:** Dr. Sharmil Shah, HCAI Health Workforce Assistant Deputy Director

# Opening Remarks

Dr. Sharmil Shah, HCAI Health Workforce Assistant Deputy Director

# Certification, Employment, and Recruitment of Certified Wellness Coaches

Ben Gamache, HCAI Health Workforce, Policy Section

# Services and Competencies of the Certified Wellness Coach

## Services

*Activities core to the Certified Wellness Coach roles*

- 1 Wellness promotion and education
- 2 Screening
- 3 Care coordination and extension
- 4 Individual support
- 5 Group support
- 6 Crisis referral

## Additional Competencies

*Demonstrated areas of knowledge to be evaluated against during field experience*

- 7 Cultural responsiveness, humility, and mitigating implicit bias
- 8 Professionalism, ethics, and legal mandates
- 9 Communication
- 10 Operating in role and different environments

# Certification Requirements – Education Pathway

## Prerequisites to Enter Program

## Degree Required

## Majors Accepted

## Field Experience Needed

### Wellness Coach I

- High school diploma or equivalent

- Associate's degree

- Social Work
- Human Services
- Addiction Studies

- 400 hours total
- Minimum hours: 150

### Wellness Coach II

- Wellness Coach I certification or Associate's in related field<sup>1</sup>

- Bachelor's degree

- Social Work
- Human Services
- Addiction Studies

- 800 hours total<sup>2</sup>
- Minimum hours: 300



# Education Pathway: Types of Certification

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**Certified Wellness Coach I (CWC I):** Requires **400 hours** of field/work experience

- Applicants with at least **150 hours** can apply to be a Certified Wellness Coach I with a **Registered** designation (R-CWC I)

**Certified Wellness Coach II (CWC II):** Requires **800 hours** of total field/work experience

- Applicants with at least **300 hours** can apply to be a Certified Wellness Coach II with a **Registered** designation (R-CWC II)

Once R-CWC completes remaining hours they will submit hours in certification portal and their **Registered** designation will be removed.

# Certification Requirements – Workforce Pathway

## Prerequisites to Enter Program

## Degree Required

## Majors Accepted

## Field Experience Needed<sup>1</sup>

### Wellness Coach I

- Professionals who are currently part of the behavioral health workforce

- Associate's degree

- Social Work
- Human Services
- Addiction Studies
- Child Development/Early Intervention
- Psychology
- Sociology

- 1,000 hours
- Must be in mental health, social work, child welfare, or addiction/substance use

### Wellness Coach II

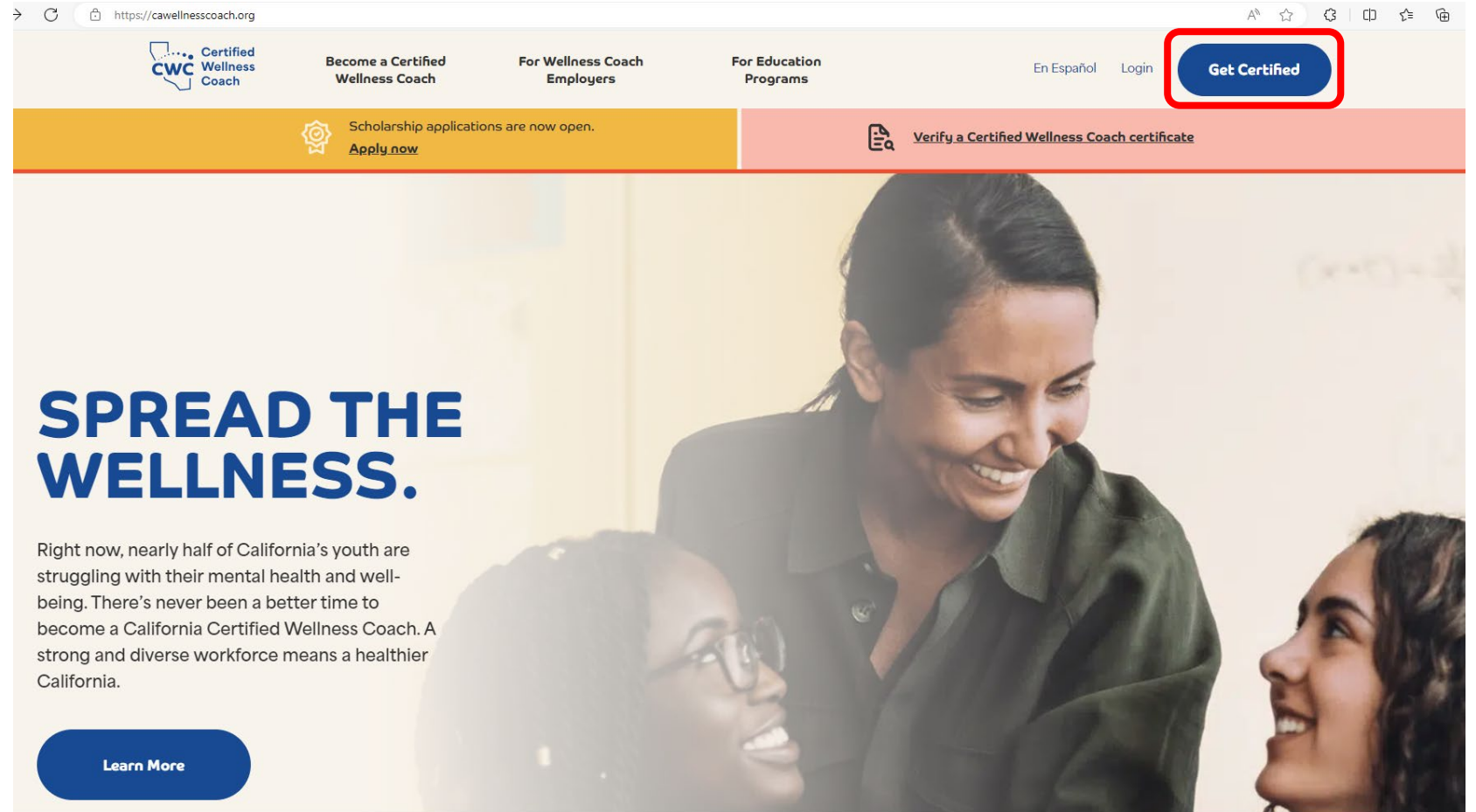
- Bachelor's degree

- Social Work
- Human Services
- Addiction Studies
- Child Development/Early Intervention
- Psychology
- Sociology

- 2,000 hours<sup>2</sup>
- Must be in mental health, social work, child welfare, or addiction/substance use

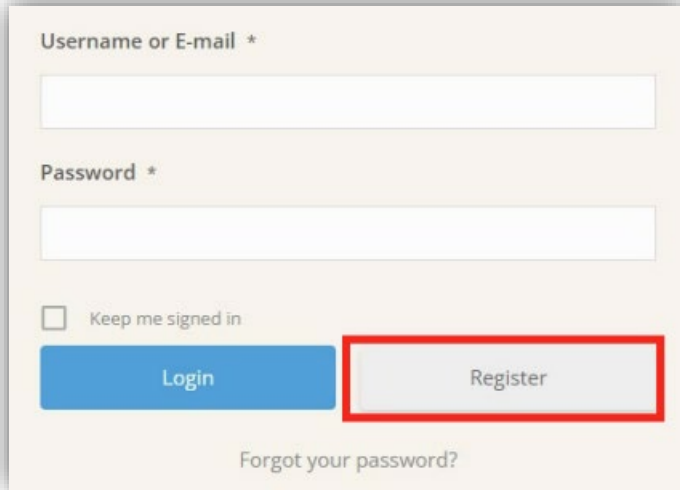
# Getting Certified: Access Portal

1. Go to <https://cawellnesscoach.org>
2. Click “Get Certified” button

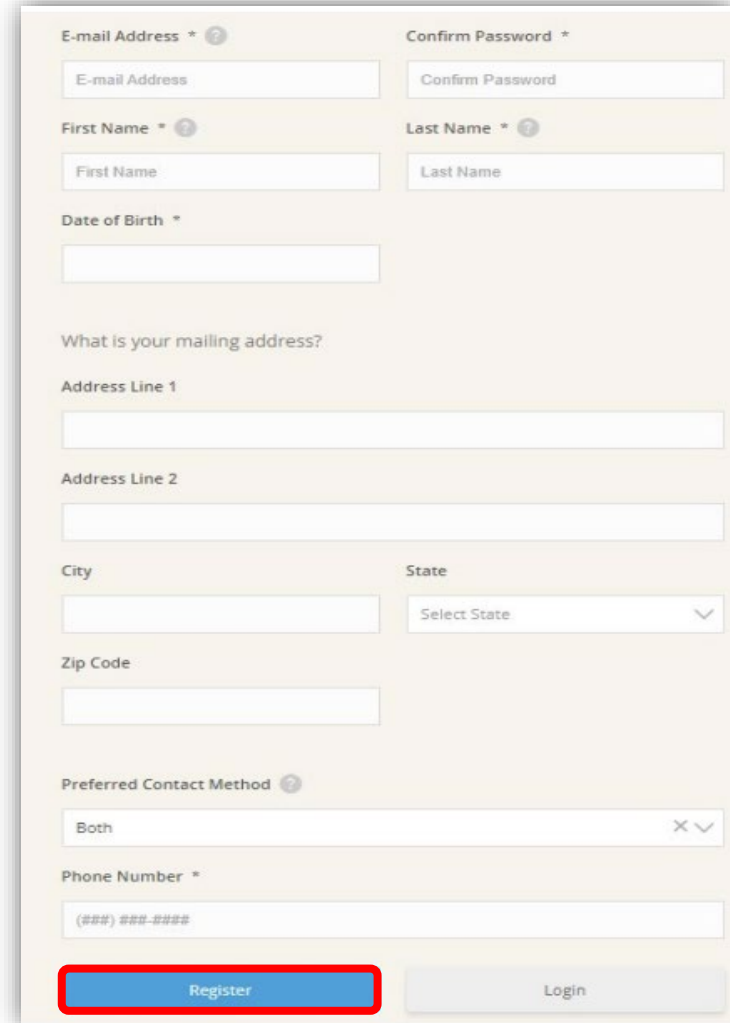


# Getting Certified: Creating Account

1. Click on "Register" on the site, complete the required details, and click "Register" again.
2. Check your email for a confirmation message and click the link provided to confirm your account.
3. Log in to the site using the same credentials.
4. Once logged in, you can start your application.



A login and registration form with the following fields: "Username or E-mail \*", "Password \*", and a checkbox for "Keep me signed in". There are two buttons: a blue "Login" button and a grey "Register" button which is highlighted with a red border. Below the buttons is a link that says "Forgot your password?"



A registration form with the following fields: "E-mail Address \*", "Confirm Password \*", "First Name \*", "Last Name \*", "Date of Birth \*", "What is your mailing address?" (with "Address Line 1" and "Address Line 2" sub-fields), "City", "State" (a dropdown menu with "Select State" and a downward arrow), "Zip Code", "Preferred Contact Method \*" (a dropdown menu with "Both" and an "x" icon), and "Phone Number \*" (with a placeholder "(###) ###-####"). There are two buttons at the bottom: a blue "Register" button highlighted with a red border and a grey "Login" button.

# Getting Certified: Contact Information

1. On the Contact Information tab, enter your first and last name.
2. Additionally, upload a valid photo ID (front and back), then click "Next" at the bottom of the page.

Contact Information   Education & Experience   Proof of Education & Experience   HCAI Code of Ethics   Additional Information   Complete Application Submission

### Application Requirements

We highly recommend you review the eligibility requirements before beginning this application. In addition, click the Application Checklist links below to see which documents you'll need to complete the application. Additional instructions will be provided within the application as well.

**Please note:** For the Education Pathway, you must hold an associate or bachelor's degree in the fields of social work, human services, or addiction studies. For the Workforce Pathway, you must hold an associate or bachelor's degree in the fields of social work, human services, addiction studies, child development/early intervention, psychology, or sociology. If you have any questions on qualifications, please call us at 503-210-1334 or email us at [certify@cawellnesscoach.org](mailto:certify@cawellnesscoach.org).

- Application Checklist for Certified Wellness Coach I (CWC I) Education Pathway
- Application Checklist for Certified Wellness Coach II (CWC II) Education Pathway
- Application Checklist for Certified Wellness Coach I (CWC I) Workforce Pathway
- Application Checklist for Certified Wellness Coach II (CWC II) Workforce Pathway

Any fields marked with a red asterisk are required.

First Name \*

Please use your legal first name as it appears on your official ID.

Last Name \*

Please use your legal last name as it appears on your official ID.

Please upload a clear and legible photograph (front and back) of your federally recognized identification. Suggested IDs include :

- Driver's licenses or other state photo identity cards issued by Department of Motor Vehicles (or equivalent)
- State-issued Enhanced Driver's License
- U.S. passport
- U.S. passport card
- DHS trusted traveler cards (Global Entry, NEXUS, SENTRI, FAST)
- U.S. Department of Defense ID, including IDs issued to dependents
- Permanent resident card
- Border crossing card
- An acceptable photo ID issued by a federally recognized Tribal Nation/Indian Tribe
- HSPD-12 PIV card
- Foreign government-issued passport
- Canadian provincial driver's license or Indian and Northern Affairs Canada card
- Transportation worker identification credential
- U.S. Citizenship and Immigration Services Employment Authorization Card (I-766)
- U.S. Merchant Mariner Credential
- Veteran Health Identification Card (VHIC)

If you don't have one of the IDs listed above, please upload a clear and legible photograph (front and back) of an alternate ID. Examples of potential IDs may include :

- Student ID
- Employee ID with photo
- Voter registration card
- Tribal ID card that may not be federally recognized
- Health insurance card with photo
- Library card with photo
- Notary ID

ID Images Upload \*

Click or drag files to this area to upload.  
You can upload up to 2 files.

Please upload a picture of the front and back of your identification. If your ID does not have a back, please upload the same image used for the front image.

HCAI only sends emails that are related to the application and certification process. By selecting the "Save" button below you are opting in to these emails.  
HCAI respects the privacy of your information and does not sell, rent, or distribute your information to any outside vendors.

**Next** Save and Resume Later

# Getting Certified: Education

1. On the Education & Experience tab, enter the High School or GED information
2. Select highest level of education from the drop-down menu and confirm details.
3. Click "Next."

Contact Information   **Education & Experience**   Proof of Education & Experience   HCAI Code of Ethics   Additional Information   Complete Application Submission

High School or GED ·

Please enter the name of your high school, or "GED" if you received a GED.

Year of Graduation or GED ·

Please type the full year you received your diploma or GED.

City ·

Enter the city where you received your diploma or GED.

State · **Nevada**

Select the state where you received your diploma or GED. If you received your diploma or GED outside the United States, select "Outside the United States".

Please select your highest level of education: ·

AA Degree in Social Work, Human Services, or Addiction Studies

Only associate and college degree graduates are eligible to apply to be a Wellness Coach at this time.

Is your degree from a California Community College, California State University (CSU) or University of California (UC)? ·

Yes

No

HCAI only sends emails that are critical to the application and certification process. By selecting the "Save" button below you are opting in to those emails.  
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Please select your highest level of education: ·

AA Degree in Social Work, Human Services, or Addiction Studies

AA Degree in Social Work, Human Services, or Addiction Studies

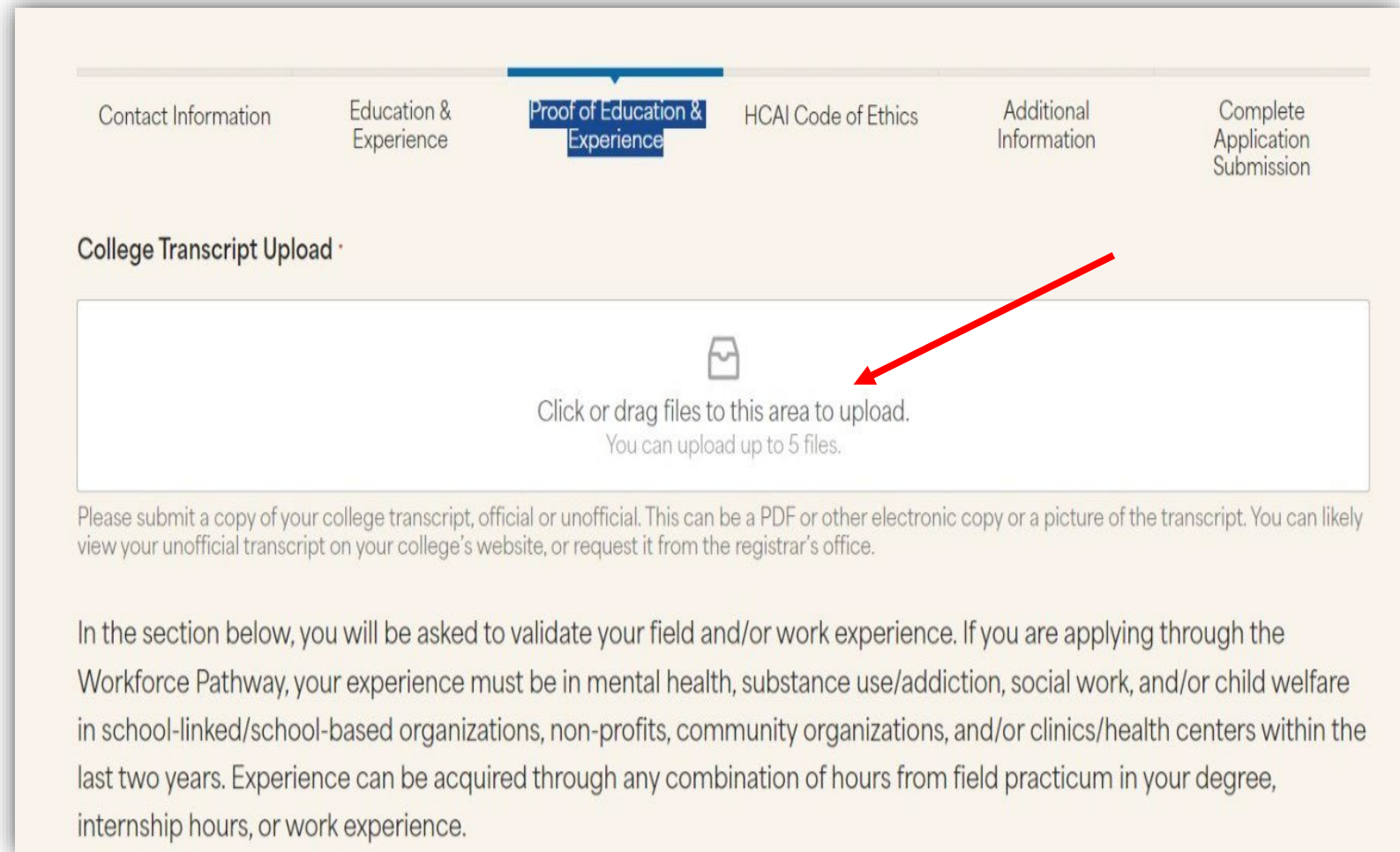
AA Degree in Child Development/Early Intervention, Psychology, or Sociology

BA/BS Degree in Social Work, Human Services, or Addiction Studies

BA/BS Degree in Child Development/Early Intervention, Psychology, or Sociology

# Getting Certified: Proof of Education

1. On the Proof of Education & Experience tab, upload a copy of your **College Transcripts** stating the major and conferred date.



Contact Information    Education & Experience    **Proof of Education & Experience**    HCAI Code of Ethics    Additional Information    Complete Application Submission

College Transcript Upload

Click or drag files to this area to upload.  
You can upload up to 5 files.

Please submit a copy of your college transcript, official or unofficial. This can be a PDF or other electronic copy or a picture of the transcript. You can likely view your unofficial transcript on your college's website, or request it from the registrar's office.

In the section below, you will be asked to validate your field and/or work experience. If you are applying through the Workforce Pathway, your experience must be in mental health, substance use/addiction, social work, and/or child welfare in school-linked/school-based organizations, non-profits, community organizations, and/or clinics/health centers within the last two years. Experience can be acquired through any combination of hours from field practicum in your degree, internship hours, or work experience.


# Getting Certified: Proof of Experience

1. Applicant downloads and fills out *The Field/Work Experience Hours Verification Table*. It is used for documenting past and present supervisors that will validate their field experience.

Please review all the steps below prior to uploading your documents.

1. Download the Field/Work Experience Hours Verification Table and fill this out on your own. (Please make note of the minimum requirements for each type of certification, included at the bottom this form, to ensure you qualify.)
2. Go to the Verification Form Templates section below and download the Instructor and Employer Verification Forms, as applicable. Email a blank form to each of your Instructor(s) and/or Employer(s) that you listed in the Field/Work Experience Hours Verification Table. A Verification Form must be completed and signed by each supervisor, and emailed back to you for upload.
3. Once you've completed the Field/Work Experience Hours Verification Table and you've received all completed Verification Forms from your supervisors, proceed with uploading the documents in the proper sections below.

**Verification Forms Upload**



Click or drag files to this area to upload.  
You can upload up to 5 files.


Please submit your Verification Form from either your teacher or employer. Follow the links below to download template Verification Forms.

**Download Verification Form Templates**

Click the links to download the Verification Forms required from your Instructor(s) and/or Employer(s), where applicable.

- To download an Instructor Verification Form, click here.
- To download an Employer Verification Form, click here.


**Field/Work Experience Hours Verification Table Upload**



Click or drag files to this area to upload.  
You can upload up to 5 files.

Please attach your Field/Work Experience Verification Table. Click the link below to get a Table template.

Click this link to download a Field/Work Experience Hours Verification Table.



## Field/Work Experience Verification Table

Applicant's Full Name:   
Your Name

Agency/ Organization/ Institution	Supervisor Name	Supervisor Email	Start Date (Month, Year)	Position Held	Hours Claimed
<b>Total Hours:</b>					

I declare under penalty of perjury under the laws of the State of California, that the above information is true and correct.

\_\_\_\_\_  
Electronic Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Email



# Getting Certified: Proof of Experience

1. Applicants must download and send verification forms to their instructors and/or employers to validate the hours they listed in the previous table.
2. Supervisors will attest to their hours and confirm their competencies and skills
3. Applicants must have all competencies and skills for their hours to apply to the field experience minimum requirements.

## Verification Forms Upload

Click or drag files to this area to upload.  
You can upload up to 5 files.

Please submit your Verification Form from either your teacher or employer. Follow the links below to download template Verification Forms.


### Download Verification Form Templates

Click the links to download the Verification Forms required from your Instructor(s) and/or Employer(s), where applicable.

- To download an Instructor Verification Form, click here.
- To download an Employer Verification Form, click here.

## Field/Work Experience Hours Verification Table Upload

Click or drag files to this area to upload.  
You can upload up to 5 files.

 **Certified Wellness Coach II**  
Verification Statement: Instructor

Date:   
MM / DD / YYYY

To whom it may concern:  
My name is   
Your Name

and I verify that , for whom I was the  
Applicant Name

instructor for , at  
Course

, meets the competencies and skills to qualify as a  
institution  
Certified Wellness Coach II.

During my time teaching and overseeing   
Applicant Name

I can attest that this is an individual who meets **all** the following competencies:

- The importance of cultural responsiveness, humility, and mitigating implicit bias to effectively engage with diverse clients and constituencies.
- Understanding of professionalism, ethics, and legal mandates and how those qualities will be employed to inform their coaching.
- The importance of communication skills to engage with their clients with an emphasis on empathy, self-reflection, and interpersonal skills.

**Wellness Education and Promotion Skills:** The ability to deliver group or classroom programming that addresses various aspects of wellness, such as building positive relationships, bullying prevention, nutrition, and exercise in relation to behavioral health; the ability to teach about mental health literacy, such as understanding symptoms, strategies for seeking help, and how to offer support; the ability to teach life skills, such as stress management, time management, and problem-solving.

**Universal Screening Skills:** The ability to support youth during behavioral health screenings by clinical professionals, such as answering questions and assisting in handing off screenings to behavioral health professionals; the ability to coordinate and assist with universal screening programs in schools or community-based organizations, following SAMHSA guidelines, under the direction of qualified professionals.

**Care Coordination and Navigation Skills:** The ability to connect individuals to both internal and external behavioral health resources, such as local, regional, or national organizations, school resources, outpatient providers, and crisis response resources; the ability to communicate with other professionals to ensure cohesive support and care; the ability to offer behavioral health-related administrative activities.

**Crisis Referral Skills:** The ability to identify potential risks and appropriately refer to clinical professionals; the ability to provide emotional support and warm handoffs with the behavioral health providers for youth awaiting crisis services.

**Individual Support:** The ability to conduct brief check-ins and scheduled meetings that focus on offering emotional support, following manualized curriculum designed to enhance wellness such as wellness education, nutrition, exercise, goal setting and planning for improving lifestyle, and life skills.

**Group Support:** The ability to deliver programming to small groups that focus on enhancing wellness and life skills, such as social-emotional skills, stress management, time management, organization, and problem-solving.

**Evidence-Based Documentation Skills:** The ability to record information systematically and objectively, relying on credible evidence to support the documentation.

I certify that this individual has done approximately  hours under my supervision  
Hours

Title

Electronic Signature

Email

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# Getting Certified: Code of Conduct And Ethics

1. Applicant reviews and initials next to each ethical value and principle.
2. Applicant signs their application and clicks "Next"

Contact Information   Education & Experience   Proof of Education & Experience   **HCAI Code of Ethics**   Additional Information   Complete Application Submission

### WELLNESS COACH CODE OF CONDUCT AND ETHICS

DEPARTMENT OF HEALTH CARE ACCESS AND INFORMATION (HCAI)

**Purpose**

Certified Wellness Coaches services are non-clinical services that support the behavioral health and well-being of children and youth, including wellness promotion and education, screening, care coordination, individual and group support, and crisis referral.

This Code of Conduct and Ethics document promotes a framework to those who are providing, receiving, and supervising services from a Certified Wellness Coach. The values and ethics described here formalize and advance Wellness Coach services in California's behavioral health system of care. For the purpose of this document, "Wellness Coach" refers to Certified Wellness Coaches.<sup>1</sup>

Employers are encouraged to consider this Code when creating Wellness Coach programs. The Code of Conduct and Ethics is based upon commonly understood principles that apply to all professionals within the health and social service fields (e.g., promotion of social justice, positive health, and dignity). The Code, however, does not address all ethical issues facing Wellness Coaches and the absence of a rule does not imply that there is no ethical obligation present. As professionals, Wellness Coaches are encouraged to reflect on the ethical obligations that they have to the children, youth, and families served, and to share these reflections with others.<sup>2</sup>

1 Adapted from the DMCS "MEDICAL CODE OF ETHICS FOR PEER SUPPORT SPECIALISTS IN CALIFORNIA"

2 Adapted from the "Community Health Worker Code of Ethics Toolkit" designed by the Harrison Institute for Public Law

**Ethical Values and Principles**

**Social Justice**

- I will engage in practices that advance social, economic, and environmental justice.
- I will recognize and understand the complexity of cultural diversity.
- I will continuously stand against oppression, racism, discrimination, and inequities, and acknowledge personal privilege.
- I will not discriminate against any person or group on the basis of race, ethnicity, gender, sexual orientation, age, religion, social status, disability, or immigration status.

Sign your initials here if you agree with the Social Justice statement above.

• I will report actual or potential harm to others within the communities I serve to the appropriate authorities.

• I will follow legal regulations set forth by the state and/or my employing organization.

• I understand that my responsibility is to uphold specific legal obligations and the well-being of the larger society supersede the loyalty owed to individual community members.

Sign your initials here if you agree with the Legal Obligations statement above.

Please sign and date your application.

E-Signature

HCAI only sends emails that are critical to the application and certification process by selecting the "Save" button below you are opting in to these emails.

HCAI ensures the protection of your privacy and does not sell, rent, or distribute your information to any outside vendors.

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**Empathy and Humility**

- I will engage clients as experts of their own experiences with an emphasis on cultural humility and responsiveness.
- I will use empathy, reflection, and interpersonal skills to effectively engage diverse clients and constituencies.
- I will apply self-awareness and self-regulation to manage the influence of personal biases and values in working with diverse clients and constituencies.

Sign your initials here if you agree with the Empathy and Humility statement above.

**Professionalism and Integrity**

- I will demonstrate a professional and approachable demeanor in behavior, appearance, and oral, written, and electronic communication.
- I will use supervision and consultation to guide professional judgment and behavior.
- I will demonstrate the ability for clear and strength-based documentation practices.
- I will respect the rights, dignity, and worth of all people and have an ethical obligation to report any inappropriate behavior (e.g., sexual harassment, racial discrimination, etc.) to the proper authority.
- I will respect the confidentiality, privacy, and trust of individuals, families, and communities that I serve.
- I will understand and abide by employer policies, as well as state and federal confidentiality laws, that are relevant to my work.

Sign your initials here if you agree with the Professionalism and Integrity statement above.

**Scope of Ability and Training**

- I will only provide services and represent myself as competent within the boundaries of my education, training, certification, consultation received, supervised experience, or other relevant professional experience.
- I will be truthful about my qualifications, competencies, and limitations on the services that may be provided.
- I will not misrepresent my qualifications or competencies to individuals, families, communities, or employers.
- I will acknowledge when client issues are outside of my scope of practice and refer clients to the appropriate health, wellness, or social support services when necessary.
- I will strive to expand my professional knowledge and competencies through continued education and training.

Sign your initials here if you agree with the Scope of Ability and Training statement above.

# Getting Certified: Additional Information

- 1. Applicant completes additional information,
- 2. Once completed, Click **Next** to continue to the next steps..

Contact Information   Education & Experience   Proof of Education & Experience   HCAI Code of Ethics   **Additional Information**   Complete Application Submission

### Opening Statement & Disclosure

California is committed to equitable access to healthcare for all. Your responses to this additional information section will help HCAI understand whether we are meeting the goal of developing a workforce that reflects California's children and youth. This section of the application should take no more than 5 minutes and (by California law) the data will be confidential. This data will not be used during the application review process and will not impact your chances of success.

Are you Hispanic, Latino/a, or of Spanish origin? Select all that apply.

- No
- Yes; Mexican, Mexican-American, Chicano/a
- Yes; Puerto Rican
- Yes; Cuban
- Yes; Central American
- Yes; South American
- Yes; Other Hispanic, Latino/a or Spanish origin
- Decline to State

With which race do you identify?

Please select an option or "Decline to State" :

What is your highest level of education?

Please select an option or "Decline to State" :

Where did you complete the degree that qualified you for this profession?

Please select an option or "Decline to State" :

Are you currently functioning in a role similar to a Wellness Coach or is this a new career path for you?

Please select an option or "Decline to State" :

What sex were you assigned at birth, on your birth certificate?

Please select an option or "Decline to State"

How do you currently describe your gender identity?

Please select an option or "Decline to State"

How would you currently describe your sexual orientation?

Please select an option or "Decline to State"

What is your disability status?

Please select an option or "Decline to State"

HCAI only sends emails that are critical to the application and certification process. By selecting the "Save" button, you agree to receive these emails.  
HCAI ensures the protection of your privacy and does not sell, solicit, or distribute your information to any outside parties.

Previous   **Next**   Save and Resume Later

# Getting Certified: Submission

1. Last Tab is the **Complete Application Submission**. Once the applicant agrees to the Penalty of Perjury statement and the background check statement, Click **“Submit”** to complete the application process.
2. Certification team will review application and follow up with email within 5 – 7 days.

Contact Information    Education & Experience    Proof of Education & Experience    HCAI Code of Ethics    Additional Information    **Complete Application Submission**

I declare under penalty of perjury under the laws of the state of California that the information provided and all copies of documents are true and correct. \*

Yes

I understand that the certificate provided under the Certified Wellness Coach program does not supplant any state or federal requirement for background or identity checks to work with specific populations. \*

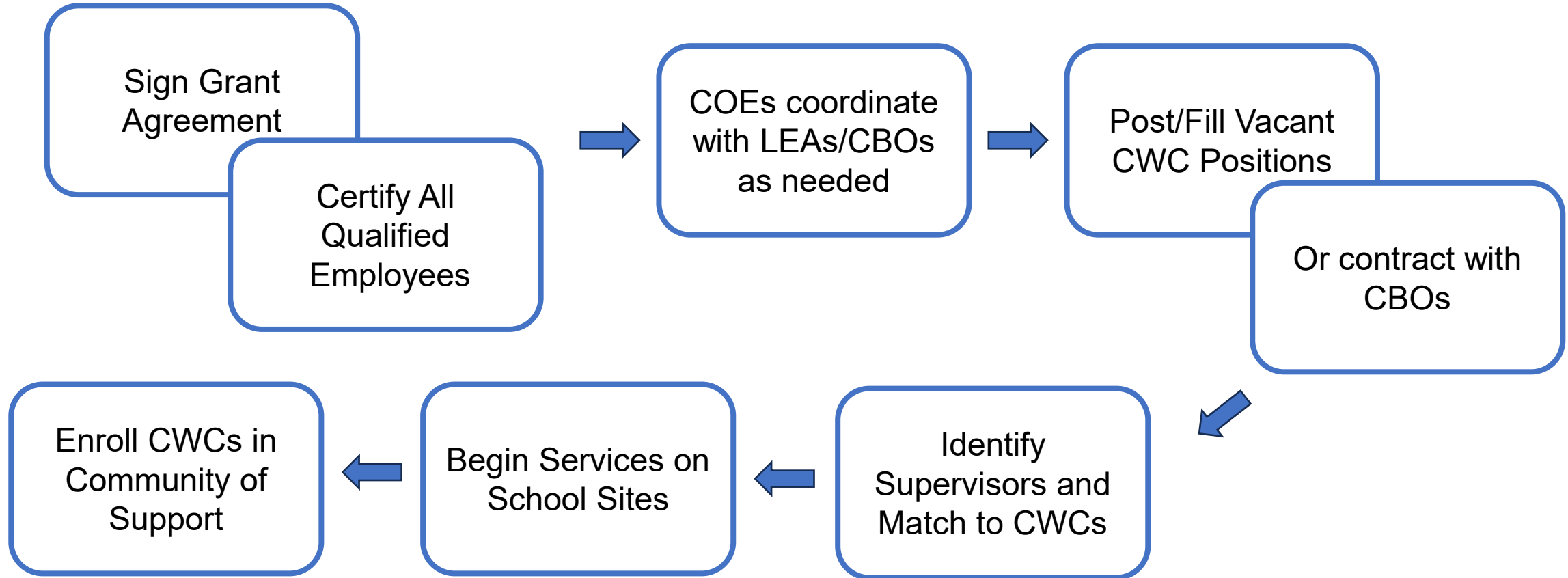
Yes

HCAI only sends emails that are critical to the application and certification process. By selecting the "Save" or "Submit" button below you are opting in to these emails.  
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[Previous](#)    [Submit](#) Save and Resume Later

# Illustrative Example: County Office of Education Hiring Wellness Coaches

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# Employer Resources: Job Descriptions



## Certified Wellness Coach I (CWC I) Job Description

### Overview of Opportunity

The [Certified Wellness Coach](#) is a state-certified profession established by California's Department of Health Access and Information as part of the [Children and Youth Behavioral Health Initiative](#). The role of the Certified Wellness Coach is to offer non-clinical services that support youth behavioral health and well-being. Behavioral health and related services performed may include:

- Wellness promotion and education
- Screening
- Care coordination
- Individual and group support
- Crisis referral

A Certified Wellness Coach may operate as part of a care team and under the direction of a Pupil Personnel Services (PPS) credentialed or licensed professional. A Certified Wellness Coach will be able to work in a variety of settings, such as schools and school-linked community-based organizations. The Certified Wellness Coach role serves as a career opportunity for individuals interested in supporting youth mental health, ensuring a consistent level of training for entry-level employees, allowing them to work in the field without a master's degree requirement.

### Description of Possible Duties

A Certified Wellness Coach I may:

- Deliver structured curriculum to groups or classrooms focused on:
  1. Wellness promotion and education (e.g., building positive relationships, bullying prevention, nutrition and exercise in relation to behavioral health, Check-In/Check-Out)
  2. Mental health literacy (e.g., symptom recognition, help-seeking strategies, how to provide support)
  3. Life skills (e.g., stress management, time management, problem-solving)
- Screening, such as:
  1. Supporting youth in completing behavioral health screenings (e.g., answer questions, hand-off screenings to behavioral health professionals)

2. Coordinating and supporting universal screening programs in schools or other community-based organizations per [SAMHSA guidelines](#), under the direction of qualified professionals
  3. Identifying and referring behavioral health needs of youth to behavioral health providers in school or broader organization setting
- Care coordination and extension, such as:
    1. Connecting individuals to internal and external behavioral health resources as needed
    2. Facilitating communication with other professionals providing support and care to youth, including connecting individuals to licensed providers so all care team members work together and operate at the top of their license or certification
    3. Providing additional support to providers, caregivers, school, or broader organization personnel, including behavioral health-related administrative activities and extension of non-clinical or clinical behavioral health support
  - Providing brief check-ins and scheduled meetings to individuals that provide emotional support and/or follow manualized curriculum that enhances wellness, such as:
    1. Wellness education (e.g., basics of behavioral health symptoms, nutrition, and exercise in relation to behavioral health)
    2. Goal setting/planning (e.g., increasing movement, sleep hygiene)
    3. Life skills (e.g., stress management, time management, problem-solving)
  - Delivering structured curriculum to small groups to enhance wellness and life skills, such as:
    1. Social-emotional skills, stress management, time management, organization, problem-solving
  - Crisis referral, which includes:
    1. Using a standardized protocol, respond to signs of crisis in the school or broader organization setting
    2. Identifying potential risks and referring to the appropriate qualified BH provider or supervisor
    3. Providing emotional support and engaging in warm handoffs with on-site behavioral health providers for youth that are waiting to be seen for crisis services

### Minimum Qualifications (Skills, Knowledge, and Abilities)

- **Certificates:** Receive either a Certified Wellness Coach I or Registered-Certified Wellness Coach I certification through the California Department of Health Care Access and Information (HCAI)
- **Education:** Associate's degree or higher
- **Knowledge** of the standards of the Certified Wellness Coach Code of Ethics, relevant laws and regulations, models for ethical decision-making, and ethical conduct of research
- **Knowledge** of practices that advance social, economic, and environmental justice
- **Ability:** Be able to make ethical decisions

- **Ability:** Be willing to engage with clients and constituencies as experts of their own experiences with an emphasis on cultural humility and responsiveness
- **Ability:** Be willing to use empathy, reflection, and interpersonal skills to effectively engage diverse clients and constituencies
- **Ability:** Be able to apply self-awareness and self-regulation to manage the influence of personal biases and values in working with diverse clients and constituencies
- **Ability:** Be able to maintain professional and approachable demeanor in behavior, appearance, and oral, written, and electronic communication
- **Ability:** Be able to recognize and understand the complexity of cultural diversity in light of psychological knowledge

### Additional Skills

*While not required, these skills are strongly desired*

- Possess a strong interest in working with children and youth, families, and staff
- Aspire to pursue a career dedicated to supporting youth mental health
- **Experience:** Possess prior experience working with children and youth
- **Skills:** Be proficient in a language other than English and can use that language to effectively communicate and engage with children and youth

### Physical Requirements

*To be completed by the organization*

### Compensation Range

Salary range to be commensurate with similar positions in the LEA.

### Who is the Department of Health Care Access and Information (HCAI)

*HCAI's mission is to ensure healthcare access is provided to Californians through its commitment to a healthier California where all receive equitable, affordable, and quality health care. HCAI strengthens the state's healthcare system by ensuring resilient health facilities, expanding the health workforce, and providing health information. Our diverse team upholds the values of professionalism, innovation, equity, and service.*

*The Office of Health Workforce Development in HCAI increases access to healthcare services in underserved communities by promoting a culturally competent and linguistically diverse health workforce. Our team evaluates healthcare policy, investigates workforce gaps, and makes over 3,000 awards each year in the form of scholarships, loans, and organizational grants.*

# Employer Resources: LinkedIn Group

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Join the Official LinkedIn Group for Certified Wellness Coaches and prospective Employers!

- All members must be **approved** before they can join.
- Coaches will be asked to **provide their Certificate ID** along with first and last name to the Group Administrator via LinkedIn messaging.
- California employers interested in hiring a Coach will be asked to **confirm the name of the organization** they represent.

[Join Group Here](#)

# **CWC Employer Support Grant Technical Assistance**

Michelle Crouch, HCAI Health Workforce, Grants Section

Jessica Fifield, HCAI Health Workforce, Research and Evaluation Section



# Grant Terms

## Term of CWC Employer Support Agreements

- Agreements will take effect on August 31, 2024, and end on June 30, 2026.
- The grant period is for 21 months, and the salary period is a 10-month minimum.

# Grant Terms

## Scope of Work

- **Certified Wellness Coach (CWC) Employees:** Provide funding to support employing Certified Wellness Coaches providing services at an eligible organization. The Grantee determines the salary amount, with CWCs employed the equivalent of full time for at least 10 months.
- **Certified Wellness Coach Intern Stipend:** Provide funding to Registered Certified Wellness Coaches is for a limited period for them to gain additional field experience. Internship awardees must qualify as an R-CWC I or R-CWC II. Interns need to agree to work a period of 200-400 hours as an R-CWC I and 200-500 hours for R-CWC II.

# Grant Terms

## Scope of Work (continued)

- **Certified Wellness Coach Employee Supervision:** Provide funding for individuals to supervise Certified Wellness Coaches employees.
- **Certified Wellness Coach Intern Supervision:** Provide funding for individuals to supervise Certified Wellness Coach interns. Awardee must provide a minimum of 2 to 5 hours of direct supervision per week for the duration of the internship period.

# HCAI-Certified Wellness Coach Employer Support Grant Program: Funding Categories

Program Category	Funding Amount
Certified Wellness Coach Employees	\$69,500 per CWC I \$82,550 per CWC II
Registered-Certified Wellness Coach Intern Stipend	\$6,000 per R-CWC I \$9,000 per R-CWC II
Certified Wellness Coach Employee Supervision	\$6,250 per CWC Employee
Certified Wellness Coach Intern Supervision	\$3,000 per Intern (R-CWC I or R-CWC II)
Indirect Costs	10% of direct costs

- HCAI expects the Grantee will begin performance of the grant agreement on the start date listed on the grant award documents
- A single payment equaling twenty-five percent (25%) of the grant award will be made upon execution of the grant agreement

## Expenditures Terms

- HCAI makes payments in arrears upon receipt of bi-annual budget (twice a year) and activities report and expenditure documentation
- Spend according to categories, hire for less the money reverts to HCAI (cannot be repurposed for other expenditures)

- The State Controller's Office mails a paper check directly to the Grantee's address on file. ***Please ensure HCAI has your most recent and current address on file to avoid delay in payment***
- HCAI reserves the right to recover monies for a Grantee's failure to perform service and other grant agreement obligations

## **Grant Agreement and Signature Process (DocuSign)**

- Grant Agreements are expected to be sent out by Monday, August 12 or Tuesday, August 13 at the latest
- Once received, you will have seven (7) days to sign the agreement
- Contracts are expected to go into effect on 8/31/2024

# Monitoring and Reporting Schedule

Report	Reporting Period	Report Due Date
Program Report 1	August 31, 2024 - February 28, 2025	March 31, 2025
Program Report 2	March 1, 2025 - August 31, 2025	September 30, 2025
Program Report 3	September 1, 2025 - February 28, 2026	March 31, 2026
Program Report 4	March 1, 2026 - June 30, 2026	July 31, 2026

# Monitoring Website: Data Elements

- Site name(s) and identify which have established Medi-Cal billing capabilities
- Narrative describing the implementation status (up to 2000 characters)
- Narrative describing any delays or obstacles you are encountering in hiring CWCs (up to 2000 characters)
- Positions filled and funds used
- Excel workbook reporting (details on next slide)



# **Excel Workbook Reporting (Draft)**

## **Tab 1: Site Data**

**(Data is entered per site/location)**

- Site name
- Site address
- Number of children and youth (under 26 years old) who receive CWC services at this site.
- Number of CWCI employees who support this site
- Number of CWCII employees who support this site
- Number of CWCI Interns who support this site
- Number of CWCII Interns who support this site
- How many Supervisors for CWCs (including Intern and employee CWCs) support this site.

## **Tab 2: Employment Data**

**(Data is entered per employee)**

- Last name
- First name
- Wellness Coach Certification #
- Employment status: part time or full time (full time=30 hours or more for 10 or more months per year)
- Position
- Site name(s) that Wellness Coach works at (Up to 10 allowed. Site name must match a site name on tab 1)

# Reminder: Press Releases

If you plan to engage with the media to promote your grant award, there are important steps to follow:

- All grantee organizations are **required to submit press releases for review** by HCAI at a **minimum of two weeks in advance** of the intended publication date for review and approval.
- **Portions, or the entirety, of your press release may be used** by HCAI, CalHHS, or the Governor's Office and **may be changed without notice to the grantee**.
- You may **issue your own press release** after HCAI, CalHHS or the Governor's Office issues a statement. The release **must still be reviewed by HCAI before release**.

Grantee organizations should stay in close contact with grant managers and provide any detailed plans related to news media engagement.

# Questions & Answers

Christopher Roina, HCAI Health Workforce, Operations Section

# Closing Remarks

Dr. Sharmil Shah, HCAI Health Workforce Assistant Deputy Director

# Resources

## HCAI Resources

- [Grant Guide](#)
- [Resource Guide](#)
- [Wellness Coach Overview](#)
- [FAQs: Certified Wellness Coach Certification Specific Questions](#)
- [Wellness Coach Website](#)

## Other Resources:

- [Multi-payer Fee Schedule](#)
- [CYBHI Website](#)

# Sign Up to Our Newsletter!

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<https://hcai.ca.gov/mailling-list/>

## Contact Us!

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Email [WellnessCoach@HCAI.ca.gov](mailto:WellnessCoach@HCAI.ca.gov)

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