

# HCAI CERTIFIED WELLNESS COACH RECERTIFICATION POLICY<sup>1</sup>

May 2025

## OVERVIEW

Recertification is an essential part of being a Certified Wellness Coach. It reflects a commitment to continued learning, ethical practice, and high-quality support for the children, youth, and communities Coaches serve. As behavioral health practices evolve, recertification ensures that coaches stay up-to-date on the latest standards and practices for behavioral health prevention and early intervention. It helps maintain trust, reinforces professionalism, and supports the delivery of safe, effective, and culturally responsive care across California.

To maintain certification, recertification every two years is required. State standards require applicants to satisfy renewal standards, including completing twenty (20) hours of continuing education before submitting a renewal application.

**Applications submitted after the certification has expired are subject to additional requirements and may cause delays in renewal.**

### State Standards for Renewal of Certification

- Certification renewal is required every two (2) years to maintain certification.
- Certification is considered inactive if not renewed by its expiration date.
- Applicants must complete 20 hours of continuing education prior to submitting the renewal application.
- Applicants must read and agree to adhere to the [Certified Wellness Coach Code of Conduct and Ethics](#).

## APPLICATION PROCESS

- Application must be submitted online through your individual certification portal.
- Applications may be submitted up to six (6) months prior to the expiration of your current certificate.
- Current certification must be in good standing.
- Applicants shall upload electronic proof of their 20 hours of continuing education requirement, inclusive of the following:
  - **Core Competencies:** Education in core areas such as mental health assessment, intervention strategies, and case management specific to children, youth, & families.
  - **Cultural Responsiveness:** Minimum of three (3) hours of education related to culturally relevant education to populations being served.
  - **Laws and Ethics:** Minimum of three (3) hours in laws and ethics training.
- Applicant shall maintain records of continuing education hours for two (2) years from the date of request for renewal.

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<sup>1</sup> Adapted from the CalMHSA [Medi-Cal Peer Support Specialist Certification Program Certification Renewal and Continuing Education \(CE\)](#)

## **NOTIFICATION OF RENEWALS**

The California Department of Health Care Access and Information (HCAI) will send several notifications of renewal via email to eligible individuals beginning six (6) months prior to the date of expiration. HCAI will use the email address on file. Revoked certifications are not considered in good standing and therefore are not eligible for renewal.

The renewal notification timeline will be as follows:

- 6 months before the deadline
- 3 months before the deadline
- 1 month before the deadline
- 1 week before the deadline
- 3 days before the deadline
- 1 day before the deadline

## **CONTINUING EDUCATION REQUIREMENTS**

To maintain certification, a CWC must complete 20 hours of continuing education (CE) every two years from the date of the initial certification and every two years thereafter. Eligible continuing education trainings promote professional development, aimed at enhancing the quality of care provided. Applicants are responsible for taking trainings within their scope of practice.

Continuing education must prioritize trainings related to the core competencies of the profession, such as education in wellness assessment, intervention strategies, and case management specific to pre-clinical behavioral health support for children, youth, & families.

Of those twenty hours, at least three (3) hours must be in trainings related to cultural responsiveness and three (3) hours in laws and ethics trainings.

To satisfy the renewal requirements, trainings must be non-repetitive (e.g., the same CE course cannot be claimed more than once during each certification period, even if the course was taken annually). Trainings may be taken in various ways, including asynchronous, in-person, online, and through a variety of trainers. Any fees associated with trainings are the responsibility of the applicant.

### **Continuing Education Topics – Core Competencies**

The bulk of continuing education hours should be focused on the core competencies of Certified Wellness Coach. Acceptable education from trainings, conferences, and coursework may include topics such as:

- Understanding or practice of prevention or early intervention behavioral health services
- Discipline of prevention and early intervention behavioral health services in which significant recent developments have occurred

- Other disciplines that enhance the understanding of the practice of prevention and early intervention behavioral health services
- Support of the children and youth being served (e.g., child and adolescent development, and intervention techniques with individuals, families, and in different systems of care)
- Pragmatic aspects of clinical practice to promote understanding and collaboration with supervisors and other clinical practitioners with whom a CWC may collaborate (e.g., legal or ethical issues, consultation, recordkeeping, supervision training)

### **Continuing Education Topics – Laws and Ethics (at least 3 hours)**

When working as a behavioral health provider supporting children and youth—especially in a preclinical, prevention-focused role like that of a Certified Wellness Coach—ethics are foundational to building trust, ensuring safety, and delivering equitable care. Certified Wellness Coaches are required to take a minimum of three (3) hours of continuing education in the topics of law and ethics. The following primary ethics topics should be central to any trainings, conferences, or coursework:

- Confidentiality and Privacy
  - a. Understand what information must be kept private, and when sharing is legally or ethically required (e.g., safety concerns, mandated reporting).
  - b. Clarify limits of confidentiality with both youth and their caregivers at the outset of services.
  - c. Share information on a “need to know” basis and seek collaboration without compromising confidentiality.
  - d. Understanding your role within HIPAA and FERPA, when applicable.
- Mandated Reporting and Duty to Protect
  - a. Know state-specific laws regarding child abuse, neglect, and threats of harm.
  - b. Understand your role as a Mandated Reporter and how to communicate this to youth and adults you work with.
  - c. Understand legal obligations to report and how to recognize and report concerns promptly and sensitively.
- Informed Consent and Assent for Minors
  - a. Understand that minors 12 and older can consent to nonclinical behavioral health support without the explicit consent of their parents or guardians – be sure to understand your organization’s guidelines and policy around this.
  - b. Recognize that minors under 12 cannot legally consent, but their assent (agreement) is still ethically important. Assent is also essential for all clients, regardless of age.
  - c. Ensure guardians provide consent while engaging youth in an age-appropriate explanation of services, when required.
- Professional Boundaries with Minors

- a. Avoid dual relationships (e.g., being a provider and a friend/family member).
  - b. Maintain appropriate emotional, physical, and social boundaries, and avoid favoritism.
  - c. Understand the difference between supportive engagement and over-involvement.
- Competence and Scope of Practice
  - a. The importance of seeking and advocating for regular supervision, participating in consultation, and professional case management with your supervisor.
  - b. Work only within the limits of your training and role—do not diagnose, treat, or give clinical advice if you are not licensed to do so.
  - c. Refer youth and families to appropriate professionals when needs exceed your scope.
  - d. Advocate for the child or youth you serve to get the support they need.
- Ethical Use of Technology
  - a. Understand confidentiality issues when using phones, email, telehealth platforms, or social media.
  - b. Follow guidelines for secure data storage and communication.
  - c. Understand that appropriate boundaries must be maintained with social media and online presence between a provider and a client.

Additional laws and ethics topics may include:

- Law and ethics relevant to California; record keeping; crisis support; client access to records; telehealth services; insurance reimbursement; civil liability; disciplinary actions and unprofessional conduct; standards of care; relevant family law; disclosures to clients; and the application of legal and ethical standards in different types of work settings.

### **Continuing Education Topics – Cultural Responsiveness (at least 3 hours)**

Cultural responsiveness is a foundational element of effective behavioral health support, especially for children and youth. Certified Wellness Coaches work with individuals from diverse racial, ethnic, linguistic, and social backgrounds—and understanding those cultural identities is essential to building trust and delivering meaningful care. Coaches are required to take a minimum of three (3) hours of continuing education related to cultural responsiveness. Acceptable trainings, conferences, and coursework may include topics that cover:

- Self-awareness: Examining personal biases and assumptions about different cultures.
- Cultural knowledge: Learning about diverse cultural practices, values, and communication styles.
- Critical thinking: Analyzing how cultural factors impact interaction and experiences.

- Active listening: Developing skills to attentively understand perspectives from diverse backgrounds.

## **ACCEPTABLE SOURCES FOR CONTINUING EDUCATION HOURS**

Continuing education must be directly related to the development of skills and competencies related to the effective delivery of pre-clinical behavioral health services to children and youth through age 25 in school-linked/school-based organizations, non-profits, community organizations, and/or health centers/clinics.

The following are examples of acceptable training providers. This list is non-exhaustive, and trainings may include those from vendors listed on the websites of the agencies and organizations below:

- California Mental Health Services Authority-approved continuing education training providers.
- County Behavioral Health Departments and Community-Based Organizations.
- School systems (i.e., Local Education Agencies, County Offices of Education, and Charter Management Organizations).
- Institutions of Higher Education (i.e., California Community Colleges, California State Universities, Universities of California, and private nonprofit universities).
- Professional certification and licensing boards (i.e., California Association for Alcohol/Drug Educators (CAADE), California Association of Marriage and Family Therapists (CAMFT), California Board of Behavioral Sciences (BBS), American Psychological Association (APA)).
- Governmental health agencies in the field of behavioral health education (i.e., Substance Abuse and Mental Health Services Administration (SAMHSA), Office of the California Surgeon General (OSG), Department of Health Care Services (DHCS)).
- Professional mental health associations or non-clinical professional organizations (i.e., California Association of School Social Workers (CASSW), California Association of School Counselors (CASC), American School Counselor Association (ASCA), California Association of School Psychologists (CASP), National Association of School Psychologists (NASP), National Alliance on Mental Illness (NAMI), Mental Health America (MHA), International Association of Peer Supporters (iNAPS), The National Council for Mental Wellbeing, Association for Mental Health and Wellness (AMHW), National Wellness Institute (NWI)).

## **CALCULATING AND RECORDING HOURS**

One (1) hour of direct educational training instruction is equal to one (1) hour of continuing education. Breaks are excluded from direct training instructional requirements and must not be counted towards the 1-hour of continuing education.

For undergraduate or graduate coursework, three (3) units of coursework are equal to twelve (12) hours of continuing education.

For events or conferences, one (1) hour at plenary session, breakout, or workshop is equal to (1) hour of continuing education. Breaks are excluded from events of conference requirements and must not be counted towards the 1-hour of continuing education.

Record hours to the nearest 15-minute increment. HCAI will provide a continuing education table for you to record your hours as part of the application process.

You will be required to record your hours in a table provided by HCAI during the application process, as well as provide supporting documentation to prove completion. Approved types of supporting documents are outlined below:

- Transcripts (for coursework taken at an Institution of Higher Education)
- Certificates of completion (for training courses)
- Stamp or receipt of attendance (for events/conferences)

For trainings that do not have formal documentation, you must provide the supervisor's name and email.

## **MAINTENANCE OF RECORDS**

Certified Wellness Coaches are responsible for maintaining a record of continuing education hours for the purpose of certification renewal. Records should be retained for a minimum of two (2) years from the date of certification renewal application. Failure to comply with continuing education requirements may result in a disciplinary action (see Certification Inactivation section below) against your certification.

## **QUALITY ASSURANCE**

HCAI will review all applicant submissions to validate that their continuing education requirements are from acceptable sources and topics. HCAI may contact applicants for additional information or clarification to confirm the validity of their continuing education hours. An applicant's certification status may be changed from "active" to "inactive" if they do not respond to HCAI's inquiry for additional information.

## **CERTIFICATION INACTIVATION**

Individuals who do not meet the recertification requirements, either by failing to submit at least 20 hours of CE in their portal by the deadline, or by failing to provide additional information upon request from HCAI, will result in a certification being changed from "active" to "inactive" status. This status will be displayed in the individual's certification portal as well as the employer search portal. The following consequences will result for those with an inactive status:

- Ineligibility for Medi-Cal reimbursement until “active” status is reinstated.

Individuals who get moved to inactive status will be required to submit proof of their continuing education hours in their portal and may be required to complete additional requirements.

### **Reactivation Process**

To reactivate an inactive status, the following steps must be completed:

- Applicants must complete their required continuing education hours after the missed deadline.
  1. Within 30 days of the missed deadline: CWCs can access their portal and update directly with their missing requirements.
  2. After 30 days of the missed deadline: CWCs status is changed from “inactive” to “expired.” An additional five (5) hours of continuing education (25 hours total) is required to get back into active status.
  3. After 1 year of the missed deadline: CWCs must reapply for certification and must show proof of 25 hours of continuing education as part of their new application.
- Once requirements are met and approved by HCAI, the individual’s status will return to “active” and that change will reflect immediately in their portal and the employer search page.
- Individuals who are reactivated are immediately eligible to offer CWC services and be reimbursed for those services through Medi-Cal.