

HCAI Certified Wellness Coach

Fieldwork Program Development and Integration Resource Guide

October 2026

Table of Contents

Purpose of This Guide 3

Competency-Based Field Education Framework 3

Assessment in Field Education 4

The Nine CSWE Competencies 4

Alignment of CSWE Competencies with Certified Wellness Coach I/II Core Activities ... 5

Field Education Across Behavioral Health Majors 8

Field Education Processes 9

Supervision Requirements 10

Field Placement in Employment Settings 10

Appendix A: Certified Wellness Coach I/II Core Services (Competencies) 11

Appendix B: Certified Wellness Coach Code of Conduct 14

Appendix C: Code of Ethics Alignment Summary: NASW–Certified Wellness Coach II 16

Purpose of this Guide

Fieldwork is an essential component of many behavioral health–related undergraduate programs, such as Social Work, Human Services, Psychology, and other related programs. Field education provides students with structured opportunities to apply classroom learning in real practice settings, develop professional skills, and prepare for entry-level roles in behavioral health support.

This guide adapts the California Social Work Education (CSWE) Educational Policy and Accreditation Standards[1] (EPAS) principles to help faculty who do not have clearly defined field placement standards design high-quality field experiences that intentionally integrate academic learning, professional behavior, and supervised practice for the non-accredited behavioral health-related programs. This may also be used by accredited social work programs to better understand how their standards align with Certified Wellness Coach competencies and ethical standards.

This guide also supports programs preparing students for **HCAI Certified Wellness Coach I/II** eligibility. Certified Wellness Coaches work in schools and children and youth-serving organizations to promote wellness, expand behavioral health literacy, coordinate care, and offer structured ***non-clinical*** support. Fieldwork experiences should be designed to cultivate these competencies.

The information provided in this document is guidelines that may be used by designated programs to support the development of field education and related placement sites.

I. Competency-Based Field Education Framework

Why Competency-Based Education?

Competency-based models[2] emphasize **demonstrated practice**, integrating:

- Knowledge and ethical values
- Interpersonal and technical skills
- Critical thinking and emotional awareness
- Sound judgment and cultural responsiveness

This approach aligns with the goals of undergraduate behavioral health programs, where students build foundational competencies for work with individuals (children and youth), families, groups, and communities.

Using competencies as the basis for curriculum and field design ensures that learning is:

[1, 2] CSWE accreditation of BSW programs ensures that EPAS standards are integrated into the curriculum and therefore are utilized as a best-practice model. National Association of Social Worker. (n.d.). NASW Code of Ethics. https://www.socialworkers.org/About/Ethics/Code-of-Ethics/Code-of-Ethics-English

- Intentional
- Measurable
- Relevant to behavioral health workforce needs

Faculty across behavioral health-related majors can use the Certified Wellness Coach competencies as a foundation that programs can adapt to fit their program needs, employer workforce needs, and student roles & responsibilities in the field placements.

II. Assessment in Field Education

Assessment is central to competency-based learning. Evaluating students' ability to demonstrate key competencies during fieldwork allows faculty to:

- Determine student readiness for behavioral health support roles with children and youth
- Ensure field experiences align with program learning outcomes
- Identify areas for curricular refinement
- Monitor overall program effectiveness

Competency-based assessment strengthens field education across behavioral health related disciplines, even without accreditation requirements.

III. The Nine CSWE Competencies

1. **Ethical and Professional Behavior**
   Ethical decision-making, professional conduct, documentation, use of supervision, and responsible technology use.
2. **Human Rights and Social, Racial, Economic, and Environmental Justice**
   Awareness of rights and inequities; advocacy for equitable access to behavioral health resources.
3. **Anti-Racism, Diversity, Equity, and Inclusion (ADEI)**
   Cultural humility, recognition of bias, and application of anti-oppressive practices.
4. **Practice-Informed Research and Research-Informed Practice**
   Understanding research basics, applying evidence, and evaluating programs or interventions.
5. **Policy Practice**
   Understanding policies that affect service systems and advocating for equity and access.
6. **Engagement**
   Building effective, culturally responsive relationships across settings.
7. **Assessment**
   Collaborative, culturally informed identification of strengths, needs, and goals.
8. **Intervention**
   Implementing evidence-based skills and supporting goal-directed change.
9. **Evaluation**
   Measuring progress and reflecting on service effectiveness.

IV. Alignment of CSWE Competencies with Certified Wellness Coach I/II Core Activities

These alignments support faculty in any behavioral health-related program to design field experiences that prepare students for Certified Wellness Coach certification.

1. Ethical & Professional Behavior

Aligned Certified Wellness Coach Areas:

- Certified Wellness Coach Code of Ethics
- Professional communication and conduct
- Strength-based documentation
- Appropriate use of supervision
- Crisis protocols and warm handoffs
- Ethical use of technology

Why it aligns:

Professionalism, communication, boundaries, and safety are necessary across behavioral health roles and central to both CSWE and Certified Wellness Coach practice.

2. Human Rights & Justice

Aligned Certified Wellness Coach Areas:

- Practices that promote justice and access
- Care coordination to support equitable resource access
- Stigma reduction and inclusive wellness education
- Trauma-informed, culturally responsive approaches

Why it aligns:
Behavioral health work requires a commitment to reducing disparities and supporting all children and youth's right to wellness.

3. Anti-Racism, Diversity, Equity, and Inclusion (ADEI)

Aligned Certified Wellness Coach Areas:

- Cultural responsiveness and humility
- Addressing personal bias through self-awareness
- Inclusive individual and group support
- Understanding the diverse identities of children and youth

Why it aligns:
Undergraduate behavioral health practitioners often work in diverse school and community settings where ADEI competence is essential.

4. Practice-Informed Research & Research-Informed Practice

Aligned Certified Wellness Coach Areas:

- Supporting implementation of universal screening tools
    - Coordinate (CWC I) or facilitate (CWC II) universal screening programs in schools or other community-based organizations
- Documenting observations
- Using evidence-informed strategies (mindfulness, emotion regulation, behavior activation) (CWC II)
- Applying program data to improve services

Why it aligns:
Evidence-informed practice is central to children and youth behavioral health support roles.

5. Policy Practice

Aligned Certified Wellness Coach Areas:

- Adhering to behavioral health protocols
- Understanding systemic barriers to access
- Advocating for supports and services

Why it aligns:
Students learn how policy influences daily practice and access to care for children and youth.

6. Engagement

Aligned Certified Wellness Coach Areas:

- Empathy and interpersonal communication
- Recognizing youth and families as experts of their own experience
- Classroom and group-based wellness activities
- Collaboration with school staff and providers
- Support behavior changes across individual, organizational, and community levels

Why it aligns:
Relationship-building is foundational to behavioral health professions.

7. Assessment

Aligned Certified Wellness Coach Areas:

- Supporting implementation of universal screening tools
    - Coordinate (CWC I) or facilitate (CWC II) universal screening programs in schools or other community-based organizations
- Identifying needs and appropriate referral strategies based on setting
- Trauma-informed, culturally responsive approaches
- Strength-based assessment

Why it aligns:
Students across behavioral health majors develop skills for early identification and collaborative assessment relevant to children and youth.

8. Intervention

Aligned Certified Wellness Coach Areas:

- Wellness and life skills education
- Emotional regulation and mindfulness practices (CWC II only)
- Goal setting and wellness planning
- Behavior activation (CWC II only)
- Crisis support and warm handoffs*
- Connecting children, youth, and families with resources

*While exposure to crisis deescalation practices are part of the curricular requirements, CWCs are not intended to practice crisis intervention or deescalation independently; direct services and assessments must be conducted by a qualified behavioral health provider. CWCs provide emotional support and engage in warm handoffs with on-site behavioral health providers for youth who are waiting to be seen for crisis services

Why it aligns:
Students gain experience implementing structured, evidence-informed interventions specific to children and youth.

9. Evaluation

Aligned Certified Wellness Coach Areas:

- Tracking progress toward goals
- Documenting changes and outcomes
- Interprofessional communication
- Adapting strategies based on children and youth responses

Why it aligns:
Evaluation skills support reflective, effective practice across children and youth behavioral health fields.

CSWE Competency	Certified Wellness Coach Alignment
Ethics & Professionalism	Ethics, documentation, supervision, crisis protocols
Human Rights & Justice	Equity practices, advocacy, access to resources
Anti-Racism, Diversity, Equity, and Inclusion (ADEI)	Cultural humility, bias management, trauma-informed care
Research & Evidence	Screening tools, evidence-informed skills, data use
Policy Practice	Protocol adherence, access advocacy, systems understanding
Engagement	Empathy, relationship skills, collaboration
Assessment	Screening support, needs identification, referrals
Intervention	Skills-building, behavior activation, wellness planning
Evaluation	Progress tracking, documentation, communication

Table 1: Summary of Certified Wellness Coach competencies aligned with CSWE competencies.

V. Field Education Across Behavioral Health Majors

Field Education as Signature Pedagogy

Fieldwork serves as the signature pedagogy for behavioral health programs by teaching students how to practice with:

- Ethical and professional judgment
- Cultural responsiveness
- Equity and justice orientation
- Evidence-informed strategies

Supervised field experiences help students integrate academic content with hands-on practice, building readiness for the Certified Wellness Coach profession and other early-intervention behavioral health positions.

Field Settings

Programs may place students in a child- and youth-serving setting, including:

- K–12 schools
- Before- and after-school programs
- Community-based organizations

- Youth-serving nonprofits
- Family resource centers
- Health centers and clinics

All placements must offer opportunities to demonstrate Certified Wellness Coach I/II–aligned skills, including wellness promotion, behavioral health literacy, screening support, care coordination, group facilitation, and crisis referral procedures.

Resource: Click here to learn how Certified Wellness Coaches and other school-based mental health providers collaborate to support students within the Multi-Tiered System of Support (MTSS).

Field Hour Requirements

Programs provide a minimum of **150 supervised hours** (CWC I associate degree programs) or **300 supervised hours** (CWC II bachelor's degree programs), which fulfill the field experience requirement needed for CWC certification. Programs may provide more hours if they must meet accreditation standards or other discipline standards.

Wellness Coach applicants can complete the remainder of their hours through any combination of hours from their degree program, volunteer hours, and/or work hours. These hours include direct service, supervision, and related professional activities in child- or youth-serving settings. Field placement instructors may determine the best method for documenting these hours. The following information is to be provided to students and field placement sites:

- How hours are structured
- Documentation and supervision expectations
- How hours contribute to eligibility for Certified Wellness Coach I/II certification

To prepare students for certification, either the placement supervisor or field instructor supervisor must complete the Supervisor Verification Form that attests to the skills and competencies gained during their field placements. These can also be viewed below for reference:

- CWC I Supervisor Verification Form
- CWC II Supervisor Verification Form

VI. Field Education Processes

1. Field Setting Processes

Programs maintain written procedures for:

- Identifying and approving sites that are behavioral health-focused for children and youth populations

- Communicating expectations to partners
- Monitoring effectiveness and suitability

2. Field Faculty Processes

Programs outline procedures for:

- Orienting supervisors
- Supporting supervisors during placements
- Evaluating supervisor quality and site alignment

3. Student Processes

Students receive clear written guidance regarding:

- Field orientation
- Placement matching procedures
- Safety protocols and emergency procedures
- Competency-based evaluation aligned with Certified Wellness Coach roles
- Monitoring progress and accessing support

VII. Supervision Requirements

Supervision must be provided by qualified personnel, such as:

- PPS credentialed school staff
- Licensed behavioral health clinicians
- Personnel trained to supervise individuals providing primary and early intervention behavioral health services

If a site lacks qualified supervisors, the program may assign a qualified university-employed staff member or faculty to operate as a site supervisor.

VIII. Field Placement in Employment Settings

When programs allow students to complete hours at their place of employment:

- Field tasks must align with Certified Wellness Coach competencies and program outcomes
- Field supervision must be distinct from job supervision
- Students must be able to adjust placements if employment changes
- These policies must be documented and shared with students and partners.

Appendix A

Certified Wellness Coach I/II Core Services (competencies)

For more information on the role of Certified Wellness Coaches in schools, visit the California School-Based Alliance for Information and Webinar on Wellness Coaches in Action.

a. **Wellness Promotion and Education:** Deliver group or classroom programming focused on:
   - Wellness promotion and education (e.g., building positive relationships, bullying prevention, diet and exercise in relation to behavioral health)
   - Mental health literacy (e.g., symptom recognition, help-seeking strategies, how to provide support)
   - Life skills (e.g., stress management, time management, problem solving)

   Additional Core Services Wellness Coach II: Deliver group or classroom programming focused on activities listed in CWC I profession and:
   - Behavior activation, including identifying, engaging in, and evaluating activities that promote positive emotions and well-being
   - Supporting and practicing overcoming maladaptive thinking patterns identified in higher-level care
   - Distraction strategies (e.g., redirection techniques, mindfulness)
   - Emotional regulation (e.g., emotion recognition and understanding, regulation strategies)

b. **Screening**
   - Support youth completing behavioral health screenings (e.g., answer questions, hand-off screenings to Behavioral health professionals)
   - Coordinate and support universal screening programs in schools or other community-based organizations per SAMHSA guidelines, under guidance of qualified professionals
   - Identify and refer behavioral health needs of youth to behavioral health providers in school or broader organization setting

   Additional Core Services Wellness Coach II
   - Facilitate universal screening programs in schools or other community-based organizations per SAMHSA guidelines

c. **Care Coordination**
   - Connect individuals to internal and external behavioral health resources (e.g., local/regional/national organizations, school or broader organization resources, outpatient providers, residential programs, crisis response resources) as well as social services (entitlement programs such as Medi-Cal, financial assistance, food, and housing) as needed
   - Facilitate communication with other professionals (e.g., behavioral health

providers, school personnel) that are 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
    - Provide additional support to family, caregivers, providers, school, or broader organization personnel, including behavioral health-related administrative activities (e.g., billing support) and extension of non-clinical or clinical behavioral health support

d. **Individual Support**: Provide brief check-ins and scheduled meetings that provide emotional support and enhance wellness; individual support may include:
    - Wellness education (e.g., basics of behavioral health symptoms, diet, hydration, and exercise in relation to behavioral health)
    - Goal setting/planning (e.g., increasing movement, sleep hygiene)
    - Life skills (e.g., stress management, time management, problem-solving)

    Additional Core Services Wellness Coach II: Activities of the Certified Wellness Coach I scope of services, and:
    - Behavior activation, including identifying, engaging in, and evaluating activities that promote positive emotions and well-being.
    - Supporting and practicing overcoming maladaptive thinking patterns identified in higher-level care
    - Distraction strategies (e.g., redirection techniques, mindfulness)
    - Emotional regulation (e.g., emotion recognition and understanding, regulation strategies)

e. **Group Support**
    - Deliver small group programming to enhance wellness and life skills (e.g., social-emotional skills, stress management, time management, organization, problem-solving)

    Additional Core Services Wellness Coach II: Activities of the Certified Wellness Coach I scope of services, and:
    - Enhance awareness of the most common BH conditions to promote understanding, reduce stigma, and foster a more informed and empathetic community

f. **Crisis Management Awareness (referral)**
    - Adhere to a standardized protocol when responding to risk in the school or broader organization setting (e.g., Commercial Sexual Exploitation of Children)
    - Identify potential risk and refer to the on-site behavioral health provider, such as a licensed clinician, Pupil Personnel Services Credential personnel, or other site-designated professional
    - Understand crisis management and de-escalation techniques

- Provide emotional support and engage in warm handoffs with on-site behavioral health providers for youth that are waiting to be seen for crisis services
- Practice personal safety and field safety

Additional Wellness Coach I/II Abilities

a. Engage in practices that advance social, economic, and environmental justice
b. Engage clients and constituencies as experts of their own experiences with an emphasis on cultural responsiveness, humility, and trauma-informed in an effort to build effective care relationships
c. Use empathy, reflection, and interpersonal skills to effectively engage diverse clients and constituencies
d. Apply self-awareness and self-regulation to manage the influence of personal biases and values in working with diverse clients and constituencies
e. Demonstrate professional and approachable demeanor in behavior, appearance, and oral, written, and electronic communication
f. Demonstrate ability for clear and strength-based documentation practices
g. Use supervision and consultation to guide professional judgment and behavior
h. Make ethical decisions by applying the standards of the Certified Wellness Coach Code of Ethics (see Program Guide), relevant laws and regulations, models for ethical decision-making, and ethical conduct
i. Use inter-professional collaboration as appropriate to achieve beneficial practice outcomes
j. Develop meaningful professional direction for life after graduation and apply social work and/or psychological content and skills to career goals
k. Engage in innovative and integrative thinking and problem solving, teamwork, project management, written, and presentation skills
l. Recognize and understand the complexity of cultural diversity in light of psychological knowledge
m. Demonstrate skills that promote behavioral change at the individual, organizational, and community levels (i.e., Outreach)

Appendix B

Certified Wellness Coach Code of Conduct and Ethics

Certified Wellness Coach providers deliver services that are non-clinical in nature. These services are to support the behavioral health and well-being of children and youth through age 25 and include the ability to offer wellness promotion and education, screening, care coordination, individual and group support, and crisis referral.

The Code of Conduct and Ethics promotes a framework for all Certified Wellness Coaches. The values and ethics described here formalize and advance Certified Wellness Coach services in California's behavioral health system of care.

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 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, Certified Wellness Coaches are expected to reflect on the ethical obligations that they have in relationships with the children, youth, and families served, and to share these reflections with others.

Ethical Values and Principles

1. **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.
2. **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.

3. **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 served.
    - I will understand and abide by employer policies, as well as state and federal confidentiality laws, that are relevant to their work.
4. **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.
5. **Legal Obligations**
    - 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 may supersede the loyalty owed to individual community members.

Appendix C

Code of Ethics Alignment Summary: NASW–Certified Wellness Coach II

1. Support (CWC) ↔ Service (NASW)

- Both commit to a service-oriented mission which prioritizes helping individuals in need.
- Both address behavioral health and social factors that affect quality of life, with Wellness Coaches focusing on youth through age 25.
- Both value prevention and promote **proactive support** to address challenges and reduce harm.

2. Social Justice (CWC) ↔ Social Justice (NASW)

- Both emphasize challenging oppression, inequities, and discrimination.
- Both require awareness of cultural diversity and promoting equity and access.
- Both commit to advocating for vulnerable or marginalized groups.

3. Empathy & Humility (CWC) ↔ Dignity & Worth of the Person and Importance of Human Relationships (NASW)

- Both center respect for client autonomy and treating individuals with dignity and cultural responsiveness.
- Both value empathy, reflective practice, and strong interpersonal skills.
- Both promote collaborative relationships that support client self-determination.

4. Professionalism & Integrity (CWC) ↔ Integrity (NASW)

- Both emphasize ethical behavior, honesty, accountability, and professionalism.
- Both include responsibilities regarding confidentiality, privacy, and ethical communication.
- Both encourage use of supervision and consultation to ensure ethical practice.

5. Scope of Ability & Training (CWC) ↔ Competence (NASW)

- Both require practitioners to work within their areas of competence and be truthful about qualifications.
- Both emphasize ongoing professional development and continued education.
- Both stress the importance of referring clients when needs fall outside one's expertise.

6. Legal Obligations (CWC) ↔ Service, Integrity, and Responsibilities to Society (NASW)

- Both uphold legal responsibilities, including mandated reporting of harm.
- Both recognize responsibilities to the broader society, even when these conflict with individual client interests.
- Both emphasize ethical practice in alignment with laws, policies, and organizational standards.

Certified Wellness Coach Ethical Area	[3]Corresponding NASW Ethical Values/Principles	Shared Themes
1. Support the behavioral health and well-being of children and youth through age 25	**Service** Social workers' primary goal is to help people in need and to address social problems	Draw on knowledge, values, and skills to help people in need
2. Social Justice Advocacy against oppression, discrimination, inequities	**Social Justice** Social workers challenge social injustice particularly with and on behalf of vulnerable and oppressed individuals and groups of people.	Promoting equity, challenging oppression, cultural responsiveness
3. Empathy & Humility Client-centered engagement, cultural humility, self-awareness	**Dignity & Worth of the Person** Social workers respect the inherent dignity and worth of the person in a caring and respectful fashion, mindful of individual differences and cultural and ethnic diversity. **Importance of Human Relationships** Social workers recognize the central importance of human relationships. Social workers engage people as partners in the helping process.	Respect, client autonomy, empathy, collaborative relationships
4. Professionalism & Integrity Ethical conduct, confidentiality, appropriate communication	**Integrity** Social workers behave in a trustworthy manner. They are continually aware of the profession's mission, values, ethical principles, and ethical standards and practice in a manner consistent with them.	Honesty, accountability, trustworthiness, ethical decision-making
5. Scope of Ability & Training Working within competence, accurate representation, ongoing learning	**Competence** Social workers practice within their areas of competence and develop and enhance their professional expertise.	Practicing within skill level, continual learning, appropriate referral
6. Legal Obligations Mandated reporting, compliance with laws, societal responsibility	**Ethical Standards: Social Workers' Ethical Responsibilities to Clients** Social workers focus on helping clients but must sometimes prioritize the law or society's safety over a client's wishes, like when they have to report child abuse or threats of harm, and they must tell clients about these limits.	Legal compliance, safety, responsibility to society and profession

Table 2: Alignment of Certified Wellness Coach Ethical Area with CSWE Ethical Value/Principle

[3] National Association of Social Worker. (n.d.). NASW Code of Ethics. https://www.socialworkers.org/About/Ethics/Code-of-Ethics/Code-of-Ethics-English