

 <p style="text-align: center;"><b>County of Sacramento Department of Health Services Division of Behavioral Health Policy and Procedure</b></p>	Policy Issuer (Unit/Program)	<b>QM</b>
	Policy Number	<b>QM-03-15</b>
	Effective Date	<b>07/01/2025</b>
	Revision Date	
Title: <b>Community Health Worker (CHW) and Enhanced CHW Services</b>	Functional Area: <b>Beneficiary Protection</b>	
Approved By: (Signature on File) <b>Signed version available upon request</b>		

**Background/Context:**

The County of Sacramento's Division of Behavioral Health recognizes the critical role that Community Health Workers (CHWs) play in enhancing the delivery of behavioral health services. CHWs serve as a bridge between the community and healthcare providers, helping to improve access to care, enhance the quality of services, and promote health equity.

The integration of CHWs into the behavioral health workforce is part of a broader strategy to address the complex needs of individuals with mental health and substance use disorders. CHWs bring unique skills and perspectives that are essential for engaging with diverse communities, providing culturally competent care, and supporting individuals in navigating the healthcare system. By leveraging the strengths of CHWs, the Division of Behavioral Health seeks to improve health outcomes, reduce disparities, and enhance the overall effectiveness of behavioral health services.

**Definitions:**

**Community Health Worker:** An unlicensed, trained health educators who provides tailored preventative services for members living with significant behavioral health needs and may have difficulty accessing services due to cultural or language barriers. Due to their experience in the field, CHWs are trusted members of their communities and help to address chronic conditions, preventive health care needs, and health-related social needs.

**Enhanced Care Services:** ECM is a statewide Medi-Cal benefit available to members with complex needs. Services include comprehensive care management, coordination among various providers and community supports designed to integrate a member's continuum of services.

## **Purpose:**

This policy and procedure document aims to establish clear guidelines and standards for member eligibility for Enhanced CHW services, CHW certification, supervision, documentation, and claiming for CHW services within the behavioral health system. It also provides guidance on the scope of practice and collaboration with other healthcare professionals. The goal is to ensure that CHWs are well-equipped to perform their duties and contribute to the mission of the Division of Behavioral Health in promoting the well-being of the community.

## **Details:**

### **I. Eligibility for Enhanced CHW Services**

To be eligible for Enhanced CHW Services, a member must meet access criteria for Specialty Mental Health Services (SMHS), defined in the Department of Health Care Services (DHCS) Behavioral Health Information Notice [BHIN 21-073](#), and/or access criteria for Drug Medi-Cal Organized Delivery System (DMC-ODS) services, defined in [BHIN 24-001](#), or subsequent guidance.

Enhanced CHW Services require a written recommendation from a physician or other licensed practitioner within their scope of practice under state law. The recommending provider does not need to be enrolled in Medi-Cal or be employed by or contracted with the Sacramento County BHS SMHS or DMC-ODS program. The recommending provider must ensure that the member meets eligibility criteria for Enhanced CHW Services.

### **II. Pathways to CHW Certification**

There are two pathways to obtaining a state-issued CHW Certificate: The Training Pathway and the CHW Experience Pathway. Both pathways ensure that individuals have or gain the core competencies outlined in the [HCAI-CHWPR-Guidance-Letter](#). CHW stakeholders expressed their strong support for the adoption of the nationally recognized [Roles & Competencies | CHW Core Consensus Project](#) to outline skills for curriculum development necessary to receive the state-issued CHW/P/R Certificate. A certificate holder must be 18 years of age for Medi-Cal reimbursement.

1. Training Pathway - The Training Pathway is intended for individuals with limited or no experience working as a CHW. This pathway outlines the state requirements for individuals to gain the necessary knowledge and skills to provide CHW services and receive a state-issued CHW Certificate. To obtain a state-issued CHW Certificate under the Training Pathway, an individual must meet all of the following requirements:
  - a. Self Attestation of lived experience
  - b. Training program completion – Must successfully complete and HCAI-approved CHW training program

- c. Field experience – Complete a minimum of 10 hours of field experience. This may be included as part of the HCAI-approved training program or through their employer. Field experience hours may be unpaid, unless provided by the CHW current employer.
2. Experience Pathway - The CHW Experience Pathway allows those who are currently working or have experience as a CHW to obtain a state-issued CHW Certificate based on this work experience. This pathway can lead to a certificate in one of three ways:
  - a. Option 1 – Verification of Skills/Core Competencies and Past Work Experience

An individual that has worked or volunteered as a CHW must meet all the following requirements:

    - i. Self-Attestation of lived experience.
    - ii. Documented hours – Applicants must have 2000 hours of prior work experience (employment or volunteering) within the past three years. If experience is from volunteering, at least 500 of these hours must be verified by an employer or an organizational representative where the applicant volunteered.
    - iii. Verification of Core Competencies – A supervisor or organization official of the CHW employee or volunteer applicant must verify and attest to the applicant having the required core competencies.
  - b. Option 2 – Prior Completion of an HCAI-Approved Training Program.

To obtain a state-issued CHW Certificate under this option, an individual must meet all of the following requirements:

    - i. Self-Attestation of lived experience.
    - ii. Submit a certificate of completion from an HCAI-approved CHW training program demonstrating that they have completed a training to work as a CHW. The certificate of completion must have been issued no earlier than five years from the certification application date and the certificate of completion must be from a time before the training program received the HCAI approval.
    - iii. Submit proof fo completing at least 10 hours of field experience (supervised CHW work in the field).
  - c. Option 3 – Reciprocity

To obtain a state-issued CHW Certificate under this option, an individual with a CHW certificate from another state or country must meet the following requirements:

    - i. Self-Attestation of lived experience.
    - ii. Submit a certificate of completion from a CHW training program from another state or country demonstrating that they have completed a training program to work as a CHW. The certificate of completion must have been issued no earlier than five years from the application date.
    - iii. Submit proof of completing at least 10 hours of field experience (supervised volunteer or paid CHW work in the field).
3. Recertification

- a. CHW certification must be renewed every two years by providing proof of completing a minimum of six hours per year (twelve hours total) of continuing education training.
- b. Continuing education must be completed through an HCAI CHW training program.
- c. Continuing education training courses and/or activities must meet state requirements. Education topics must focus on CHW core competencies, updates on applicable Medi-Cal policies, or CHW evidence-based/community-defined best practices.

#### 4. Supervision

CHWs must be supervised by a Medi-Cal enrolled provider. The supervising provider must be an individual licensed practitioner or a behavioral health provider organization, community-based organization, or clinic. The supervising provider does not need to be within the same entity as the physician or other licensed practitioner that made the recommendation for Enhanced CHW Services. The supervising provider does not need to be physically present at the service site; however, the supervising provider is responsible for ensuring the provision of Enhanced CHW Services complies with all applicable requirements, including training requirements.

### III. Scope of Work

For CHWs, the scope of work, includes using their knowledge of culture and community to provide the following array of services:

- Health education to promote the Medi-Cal member's health or address barriers to health care, including providing information or instruction on health topics.
- Health navigation to provide information, training, referrals, or support to assist Medi-Cal members to access health care, understand the health care system, and engage in their own care and to connect members to community resources necessary to promote their health.
- Screening and assessment that assist Medi-Cal members to connect to appropriate services to improve their health.
- Individual support or advocacy that assists Medi-Cal members in preventing the onset or exacerbation of a health condition or preventing injury or violence.

### IV. Claiming for Enhanced CHW Services

Prior authorization is not required for Enhanced CHW Services.

Enhanced CHW Services are claimed as a 30-minute encounter providing "education and training for patient self-management by a qualified nonphysician health care professional using a standardized curriculum, face-to-face with the patient (could include caregiver/family)" using the following CPT codes:

- 98960 – individual patient
- 98961 – two to four patients

- 98962 – five to eight patients

**V. Documentation Requirements**

Enhanced CHW Services must meet all the documentation requirements in [BHIN 23- 068](#), including:

- Standardized assessment requirements for specialty behavioral health services;
- Development and maintenance of a problem list that may include a member’s symptoms, conditions, diagnoses, social drivers, and/or risk factors; and
- Progress notes for all Enhanced CHW Services delivered in individualized and group settings.

A standalone written plan of care is not required for Enhanced CHW Services.

**Related Policies:**

- QM-03-07 Staff Registration and Credentialing

**Distribution:**

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X	Adult Contract Providers		
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X	Substance Use Prevention and Treatment		
X	Specific grant/specialty resource		

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