



Policy/Procedure:	Staff Qualification & Training Requirements*
Reviewed and Accepted by:	John Migliore III & Brad Potter
Approved by:	John Migliore III
Date of Issue:	3/1/17
Date Revised/Reviewed:	10/1/17; 9/14/18; 12/22/2020; 10/8/2021

- ***This policy is intended for Health Home Care Manager serving HH and HARP Members. For Staff Qualifications and Training Requirements for Health Home Plus (HH+), see HH+ & SMI Policy.***

Policy:

Bassett Community Health Navigation will provide quality Health Home Services by ensuring that Navigators meet specific qualifications of education and experience, and receive training in necessary procedures and the available services and specific health needs of Bassett Community Health Home Member population. *BCHN requires that all CHN’s read and attest to reviewing and understanding all 25 BCHN Policies and Procedures, within 30 days of hire and prior to any caseload assignment.*

Quality Management and Performance Improvement

Each Bassett CHN CMA is expected to maintain and keep personnel records on file for each Health Home Care Manager. Personnel Record review will be conducted by Bassett CHN Lead HH, at minimum, on an annual basis or as needed to ensure requirements are met.

Procedures:

A. Community Health Navigator I/Care Manager - Qualifications

1. CHN1 must meet the following minimum education and experience requirements:
 - a. Bachelor’s Degree in Human Services, Nursing or related field **OR**
 - b. Associate Degree with an additional 2 yrs of experience in the human services field or nursing may be considered **OR**
 - c. High School Diploma or GED with an additional 4 yrs of experience in the Human Services field or Nursing may be considered
2. It is preferred that CHN1 staff have previous work experience in:
 - a. Human services or nursing **and/or**
 - b. Case management/Service Coordination
3. Must possess a valid driver’s license

B. Community Health Navigator II/Member Outreach Staff- Qualifications

1. CHN2 must meet the following minimum education and experience requirements:
 - a. Bachelor’s Degree in Human Services, Nursing or related field **OR**
 - b. Associate Degree with an additional 2 yrs of experience in the human services field or nursing may be considered **OR**
 - c. High School Diploma or GED with an additional 4 yrs of experience in the human services field or nursing may be considered



2. In addition, CHN2 staff must meet the following additional experience requirements:
 - a. 6 months experience as Community Health Navigator I at Bassett; **OR**
 - b. 1 year of experience in the human services field/marketing or working with outreach programs:
 - i. Experience coordinating services for targeted populations
 - ii. Experience in community outreach/marketing
3. Must possess a valid driver's license

C. Community Health Navigator III/Community & Member Outreach Staff - Qualifications

1. CHN3 staff must meet the following minimum requirements for education and experience:
 - a. Bachelor's Degree in Human Services, Nursing or related field; **OR**
 - b. Associate Degree with an additional 2 yrs of experience in the human services field or nursing may be considered; **OR**
 - c. High School Diploma or GED with an additional 4 yrs of experience in the human services field or nursing may be considered
2. CHN3 staff must also meet one of the following additional experience requirements:
 - a. 1 year of experience as a Bassett Community Health Navigator II; **OR**
 - b. 3 years of experience in the human services or marketing fields
 - c. Leadership experience preferred
3. Must possess a valid driver's license

D. Required Qualifications for Staff conducting HCBS Eligibility Assessments with HARP Members

1. See Bassett's HH+, SMI and NYS Eligibility Assessment Policy
2. CHN staff assigned to HH+ SMI and AOT Members must meet the following requirements for both education and experience:
 - a. EDUCATION:
 - i. A Bachelor's Degree in one of the following majors or concentrations; or
 - a) Social work
 - b) Psychology
 - c) Nursing
 - d) Rehabilitation
 - e) Education
 - f) Occupational therapy
 - g) Physical therapy
 - h) Recreation/Recreation Therapy
 - i) Counseling
 - j) Community Mental Health
 - k) Child and Family Studies
 - l) Sociology
 - m) Speech and hearing
 - n) Other relevant Human Services field



- ii. A NYS teacher's certificate for which a bachelor's degree is required; **or**
- iii. NYS licensure and registration as a Registered Nurse and a bachelor's degree; **or**
- iv. A Bachelor's level education or higher in any field with five years of experience working directly with persons with behavioral health diagnoses; **or**
- v. A Credentialed Alcoholism and Substance Abuse Counselor (CASAC).

b. EXPERIENCE:

- i. At least two years of experience in one of the following areas:
 - a) Providing direct services to people with Serious Mental Illness, Developmental Disabilities, or Alcoholism or Substance Abuse*; OR
 - b) Linking individuals with Serious Mental Illness, Developmental Disabilities, or Alcoholism or Substance Abuse to a broad range of services essential to successful living in a community setting (e.g. medical, psychiatric, social, educational, legal, housing and financial services).*

*A Master's Degree in one of the specific fields listed above may be substituted for one year of experience.

- 3. CHN staff conducting HCBS Eligibility Assessments must complete the following trainings:
 - a. HCS-UAS Training Module for the HCBS Eligibility Assessment
 - b. Training in the array of HCBS services and supports available, and the client-centered service planning process.
 - c. Training in the assessment of individuals whose condition may trigger a need for HCBS services and supports, and an ongoing knowledge of current best practices to work with assist the person to improve their health and quality of life.
 - d. Trainings will include specific training relevant to special populations, comorbidities, chronic disease and wellness, Preventative Screening and Wellness Care, and Clinical and Process Measure Performance Metrics to ensure that appropriate skills needed to deliver the 6 Core Services to HCBS members.
- 4. CHN staff conducting HCBS Eligibility Assessments must be supervised by clinical staff meeting one of the following qualifications:
 - a. Licensed level Healthcare Professional (e.g., RN, licensed clinician, psychologist) with prior experience in a behavioral health clinic or care management supervisory capacity; **OR**
 - b. Master's level Professional with 3 years prior experience supervising clinicians and/or CMs who are providing direct services to individuals with SMI/Serious SUDs.
 - c. Any person for whom a waiver of these qualifications has been granted by NYSDOH.

E. Basic Health Home Staff Orientation & Training Requirements

- 1. BCHN and Partnering CMA staff required to review & complete program and job specific training and orientation materials within 30 days of Employee Start Date.
 - a. Complete Bassett CHN NEO Checklist with Team Leader/CMA Supervisor
 - i. Netsmart CareManager
 - ii. E-paces (For staff who monitor/verify Medicaid enrollment)
 - iii. EPIC/Bassett Link



- iv. HIXNY
 - v. HCS (& UAS HCBS Eligibility Training for HARP qualified staff)
 - vi. MAPP-HHTS
- b. Return completed NEO Checklist/CMA Checklist to Bassett CHN Operations Manager
- i. Training Completion will be tracked by Bassett CHN Quality Analyst
2. Bassett Community Health Navigation and Partnering Care Management Agency staff must complete the following required trainings within 60 days of beginning employment:
- a. Marketing Health Home care management services
 - b. Typical care management needs of populations with multiple co-morbidities
 - i. Major Health Conditions/Preventative Care & Wellness (Website Trainings)
 - a) Obesity
 - b) Asthma
 - c) Diabetes
 - d) Hypertension
 - e) HIV/AIDS
 - f) Mental Health
 - g) Clinical and Process Measure Performance Metrics
 - c. The availability and range of services for Health Home Members
 - i. HARP/HCBS Services
 - ii. HH+
 - iii. Assisted Outpatient Treatment
 - d. Outreach and engagement strategies for members who are disengaged from care or have difficulty adhering to treatment recommendations including individuals with histories of homelessness, criminal justice involvement, first-episode psychosis, and transition-age youth
 - e. Evidence-based methods for increasing engagement including: (face to face)
 - i. Motivational Interviewing
 - ii. Person-centered Planning
 - iii. Recovery-Oriented Practices & Wellness Recovery Action Plans
 - iv. Role and benefits of Certified Peer Specialists/Peer Advocates
 - f. Training on any required assessment tools: (face to face)
 - i. Comprehensive Assessment
 - ii. HARP/HCBS Eligibility Assessment (for HARP qualified staff)
 - g. Confidentiality & Consent Training– HIPAA/CFR 42/DOH 5055 sharing of information
3. All Bassett CHN and Partnering Care Management Agency staff must review Bassett CHN Policies and Procedures and sign Confirmation of Receipt and Understanding annually. (Within 12 months of last occurrence).
4. The purpose of this policy is to establish procedures for conducting the required background checks for Health Home Care Managers and CMA employees, to better protect members under the age of 21 and those considered as “vulnerable persons”, as defined by New York State, which will help ensure their safety. Chapter 57 of the Laws of 2018 includes new statutory requirements related to Criminal History Record Checks (CHRC), Mandated Reporter requirements, and Statewide Central Register (SCR) Database checks. BCHN and CMA partners will conduct background checks on all Care Manager applicants, prior to employment. These will include, but are not limited to:
- a. Staff Exclusion List (SEL) Screening (Justice Center);



- b. Criminal History Check processed through the CHRC application in the Health Commerce System (HCS);
- c. NYS Statewide Central Register (SCR) Database;
- d. National Sex Offender Registry, including level 1 offenders (if applicable);
- e. Valid Driver's license and verification of safe driving record;
- f. Medicaid Exclusion Screening;
- g. Reference checks and verification of appropriate education and experience.

Health Home Care Managers and other applicable Health Home employees and their applicable agency employees complete three required clearances:

- Staff Exclusion List (SEL) through the NYS Justice Center for the Protection of People with Special Needs (Justice Center)
 - ❖ NYS Social Services Law 495
 - ❖ For HH and CMA employees that will have regular and substantial contact with individuals under the age of 21
- Criminal History Record Check (CHRC) through NYS Department of Health (DOH) >NYS Public Health Law Article 28-E >For unlicensed HH and CMA employees who provide direct care to members under the age of 21 or have access to their property and belongings
- Statewide Central Register Database Check (SCR) through the Office of Children and Family Services (OCFS)
 - ❖ NYS Social Service Law 424-a
 - ❖ For HH and CMA employees that that will have the potential for regular and substantial contact with members under the age of 21