

Care Neighborhood CHW Training Checklist

Training for CHWs will occur during interdisciplinary team meetings, training and lecture opportunities at CHCN, shadowing the CHCN SW Lead in the community, outside training opportunities and on the job experiential training.

Topic	Completed
Requirements	
- Medical Clearances/ HIPPA (to be completed by Clinic Organization)	
- CHCN Confidentiality Agreement	
General	
- Understands role and mission of CHCN	
- Understands Care Neighborhood Concept, Mission, Goals	
- Understands long term sustainability plan (whole person care initiative and ongoing clinic expansion)	
Care Neighborhood Process	
- Patient Selection/Eligibility	
• Understands selection criteria, exclusions and referral criteria	
• Understands how to complete a pre-outreach review	
• Understands how to outreach and talk about Care Neighborhood to providers and prospective patients	
- Supervisit	
• Understands safety protocol	
• Understands mandatory reporting requirements, APS and CPS	
• Understands crisis protocols/escalation criteria	
• Understands required documentation	
i. Patient Agreement	
ii. Release of Information (ROI)	
• Understands how to conduct and score key assessments and their implications	
i. PHQ-9	
ii. DME-ADL	
iii. Medication Data Collection	
• Understands the key resources available at their home clinic	
i. How to follow up with provider around Durable Medical Equipment	
ii. How to follow up with medications	
iii. How to follow up for an office visit	
iv. How to follow up with Behavioral Health	
v. How to follow up with specialty referrals	
vi. How to follow up with Advanced Directives/POLST	
vii. Pain Management Clinic Policy	
• Understands how to assess and follow up with key community resources and benefits	
i. Food	
1. Cal Fresh	
2. Food Bank	
3. Meals on Wheels	
4. Project Open Hand & Diabetes Specific Referrals	
ii. Housing	
1. Section 8	
2. HomeStretch (Alameda County)	

	<ol style="list-style-type: none"> 3. Subsidized and Low Income 4. Board and Care 5. Senior Housing 	
iii.	<p>Financial/ Benefits</p> <ol style="list-style-type: none"> 1. IHSS (In Home Supportive Services) 2. SSI 3. SSDI 4. GA 5. Medi-Cal Renewal 6. Legal Assessment & Referral to Bay Area Legal Aid 	
iv.	<p>Transportation</p> <ol style="list-style-type: none"> 1. Paratransit 2. Disabled Bus pass 3. Uber Ride benefit 4. Health Plan's Benefit 	
v.	<p>Substance Abuse</p> <ol style="list-style-type: none"> 1. ACCESS 	
	<ul style="list-style-type: none"> • Understands how to create and update a Care Plan 	
	<ul style="list-style-type: none"> • Understands how to document Supervisit, Care Plan and other notes in NextGen 	
	<ul style="list-style-type: none"> • Understands how to develop a Shared Action Plan with the patient 	
	<ul style="list-style-type: none"> - Enrollment 	
	<ul style="list-style-type: none"> • Understands various patient acuity levels 	
	<ul style="list-style-type: none"> • Understands how to develop a care plan with interdisciplinary team 	
	<ul style="list-style-type: none"> • Understands how to summarize the visit and communicate with the provider 	
	<ul style="list-style-type: none"> - Understands what CHCN resources are available 	
	<ul style="list-style-type: none"> • Inpatient and support from IP concurrent review RNs 	
	<ol style="list-style-type: none"> i. SPOC (Single Point of Contact) 	
	<ul style="list-style-type: none"> • Utilization Management and Prior Authorizations 	
	<ul style="list-style-type: none"> • Eligibility 	
	<ul style="list-style-type: none"> - Understands how to refer a patient to Care Neighborhood 	
	<ul style="list-style-type: none"> - Understands how to complete a basic assessment 	
	<ul style="list-style-type: none"> • Outreach 	
	<ul style="list-style-type: none"> • Enrollment 	
	<ul style="list-style-type: none"> • Outcomes- IP, ER, readmit rate, Provider/Clinic Visits, Provider visit within 10 business days after hospitalization 	
	<p>Continuous Improvement</p>	
	<ul style="list-style-type: none"> - Understands how to complete a root cause analysis and the role it plays with case management 	
	<ul style="list-style-type: none"> - Understands a 'Why Wheel' and the environmental factors leading to hospitalization 	
	<p>Systems and Tools</p>	
	<ul style="list-style-type: none"> - Understands how to navigate through Welkin 	
	<ul style="list-style-type: none"> • How to filter patients with upcoming visits to clinic 	

<ul style="list-style-type: none"> • Look up patients details and utilization 	
<ul style="list-style-type: none"> • Know who is in hospital and who is the IP RN with CHCN for collaboration 	
<ul style="list-style-type: none"> • Know how to input key assessments, document patient contact and update care plan 	
<ul style="list-style-type: none"> - Understands how to navigate community resources in cloud platform 	
<ul style="list-style-type: none"> - NextGen 	
<ul style="list-style-type: none"> • Understands how to task and communicate in NextGen via telephone templates 	
<ul style="list-style-type: none"> • DME orders 	
<ul style="list-style-type: none"> • Understands how to succinctly communicate with the provider 	
Case Management/ Professional Skills	
<ul style="list-style-type: none"> - Mental Health First Aid 	
<ul style="list-style-type: none"> - Motivational Interviewing 	
<ul style="list-style-type: none"> - Trauma Informed Care 	
<ul style="list-style-type: none"> - Smoking Cessation 	
<ul style="list-style-type: none"> - Harm Reduction Approach 	
<ul style="list-style-type: none"> - Crisis intervention/ Escalation Protocol 	
<ul style="list-style-type: none"> • Medical- 911, RN 	
<ul style="list-style-type: none"> • Social/emotional/ behavioral- suicidality, APS/CPS reporting 	
<ul style="list-style-type: none"> - SBIRT (Screening, Brief Intervention and Referral to Treatment) 	
<ul style="list-style-type: none"> - Overall integrated behavioral Health (IBH) 	
<ul style="list-style-type: none"> - Professional development and boundaries 	
Clinical Training	
<ul style="list-style-type: none"> - Disease specific training 	
<ul style="list-style-type: none"> • Diabetes 	
<ul style="list-style-type: none"> • CHF 	
<ul style="list-style-type: none"> • COPD 	
<ul style="list-style-type: none"> - Conversation Pages- Clemens Hong 	
<ul style="list-style-type: none"> - Pain Management 	
Insurance Training	
<ul style="list-style-type: none"> - Understands the basics and differences of various medical insurances 	
<ul style="list-style-type: none"> • Managed Medi-Cal, Medicare, dual (Medi-Cal and Medicare) 	
RESPECT Group- Advocacy	
<ul style="list-style-type: none"> - Understands how to get involved with a RESPECT advocacy group 	