How to Become a **Certified Personal Health Navigator** with the Oregon Health Authority

Personal Health Navigators (PHNs) provide information, assistance, tools, and support to enable a patient to make the best healthcare decisions in the patient’s particular circumstances and in light of the patient’s needs, lifestyle, combination of conditions, and desired outcomes.

PacificSource Community Solutions employs Traditional Health Worker Liaisons (THW Liaisons) who are available to help PHNs through the certification process with the Oregon Health Authority (OHA), as well as the PacificSource validation/credentialing process so that they can bill Medicaid for their services.

**STEP 1**

**Complete an OHA-approved training program**

For a list of approved trainings, contact your area THW Liaison or find more information at the OHA Office of Equity and Inclusion (OEI) website:[Oregon.gov/OHA/OEI/Pages/THW-OHA-Approved-Training-CEU.aspx](https://www.oregon.gov/oha/OEI/Pages/THW-OHA-Approved-Training-CEU.aspx)

*Or*

If you have completed some or all of the certification training requirements, you may be able to count previously completed training toward certification.

*Or*

**Apply for certification using the legacy clause**

OHA’s legacy clause allows individuals with 3,000 hours of work or volunteer experience as a PHN to apply for certification. You will have to provide a letter of recommendation from a previous employer, as well as a document that verifies that you have met the 3,000-hour requirement. The recommendation letter should outline paid or volunteer work as a PHN or similar role between January 1, 2008, and the present.

If you have questions regarding OHA-approved trainings or the requirements for the legacy clause, please contact your THW Liaison or OHA’s THW program: [THW.program@DHSOHA.state.or.us](mailto:THW.program@DHSOHA.state.or.us) or **971-673-3353.**

**STEP 2**

**Complete the Oral Health training requirement**

Effective May 13, 2019, PHNs are required to complete a THW oral health training: [Oregon.gov/OHA/OEI/Pages/THW%20Oral%20Health%20Requirements.aspx](https://www.oregon.gov/oha/OEI/Pages/THW%20Oral%20Health%20Requirements.aspx)

The oral health training on the OHA OEI website is free of charge. After completion, the OHA will notify you by email that you have completed this requirement. Keep a copy of your proof of completion to submit with your THW certification application.

**STEP 3**

**Email your THW certification application to:**

[THW.program@ODHSOHA.oregon.gov](mailto:THW.program@ODHSOHA.oregon.gov)

Applications are available on the OHA OEI website:   
[Oregon.gov/OHA/OEI/Pages/THW-PHN.aspx](https://www.oregon.gov/oha/OEI/Pages/THW-PHN.aspx)

You will need to scan and attach a copy of the following document to your application email:

* Government-issued identification
* Certificates of oral health training completion
* If applying under the legacy clause, documentation that verifies that you have worked or volunteered for at least 3,000 hours in a role similar to a PHN

Emailing is the fastest method. Applications sent by mail or fax may be delayed as much as 90 days.

**STEP 4**

**Complete your background check**

Once the Administrative Specialists at OHA OEI process your application, they initiate a background check through the Oregon Criminal History and Abuse Records Data System (ORCHARDS). ORCHARDS will send you an email requesting your consent to conduct the background check, as well as a quick survey.

* If you do not receive an email about the background check process within 1 to 2 weeks of submitting your application, check your spam folder. If you still have not received an email, contact the OEI THW program at [THW.program@ODHSOHA.oregon.gov](mailto:THW.program@ODHSOHA.oregon.gov).
* Pay careful attention to the instructions in the email. You only have 21 days to complete the process. If you do not complete the process within 21 days, your application will be closed, and you will have to contact OHA OEI to have another background check initiated. You can only do this three times in a calendar year. If you don’t follow through after the third time, you will need to wait one year and reapply.
* If you have lived outside of Oregon in the past five years, you will also need to submit fingerprints. There may be additional instances in which ORCHARDS requests fingerprints. Follow the instructions from ORCHARDS.
* This background check is required even if you have had one in the past. It is required every time you apply. If you have recently completed the background check process to be certified as another THW worker type, you will not need to take another background check.
* ORCHARDS will notify OHA OEI once your background check is completed. If your background check is approved, OHA OEI will finish processing your THW certification application and add you to the THW Registry.
  + **If approved,** OHA OEI will notify you by email with a Determination Letter. Save this letter, as it contains your THW registration number and certification expiration date.
  + **If denied,** ORCHARDS will notify you and provide instructions on how to appeal. The appeals process strictly involves you and ORCHARDS, and not OHA OEI.

**Note:** Steps 5 through 7 are for Personal Health Navigators who plan to bill PacificSource Community Solutions. Ask your employer if you need to complete these steps.

**STEP 5**

**Obtain a National Provider ID (NPI)**

In order to bill Oregon Medicaid, you will need to obtain an NPI number: Apply on the National Plan and Provider Enumeration System website: [NPPES.CMS.HHS.gov/#](https://nppes.cms.hhs.gov/#/).

**STEP 6**

**Email your validation (credentialing) application to**    
**PacificSource Community Solutions:** [Credentialing@PacificSource.com](mailto:Credentialing@PacificSource.com)

Validation is the PacificSource version of provider credentialing and is only required for those billing PacificSource Community Solutions. The application, listed as the *Medicaid Provider Validation Application,* is available on our website: [PacificSource.com/media/30936](https://pacificsource.com/media/30936). Contact your THW Liaison if you need help filling out the application.

**STEP 7**

**Apply for an Oregon Medicaid ID Number**

In order to bill Oregon Medicaid, you will need to obtain an active Medicaid ID number.   
To enroll as an Oregon Health Plan Provider, visit   
[Oregon.gov/OHA/HSD/OHP/pages/provider-enroll.aspx](http://www.Oregon.gov/OHA/HSD/OHP/pages/provider-enroll.aspx)

If you do not have an Oregon Medicaid ID number, you may ask for assistance from PacificSource when you send in your Validation application. Check the box that says, “*Please check if not currently enrolled with Oregon Medicaid, and assistance with enrollment is required.*”

The OHA now requires a Provider Enrollment Agreement (3975) Form be completed and submitted with each enrollment request. You may download a copy of this form on the PacificSource website. Please include it with your validation application if requesting assistance with enrollment. Please note: This CCO Medicaid ID registration process will not allow Fee for Service Open Card billing.

Please contact us for additional assistance: [THWinfo@PacificSource.com](mailto:THWinfo@PacificSource.com).

**For information on how to renew your PHN certification, visit:** [Oregon.gov/OHA/OEI/Documents/Recertification%20Process%20for%20Traditional%20Health%20Workers.pdf](https://www.oregon.gov/oha/OEI/Documents/Recertification%20Process%20for%20Traditional%20Health%20Workers.pdf)

THW certifications are valid for three years (36 months). You must complete at least 20 hours of OHA OEI-approved continuing education training for certification renewal.

**About** **Continuing Education Units (CEUs):**

* CEUs are awarded for additional THW trainings offered by an OHA approved training program.
* CEUs are awarded for OHA-approved trainings, events, or conferences.
* Non-OHA-approved seminars, workshops, and conferences may also count if they relate to work you do, your scope of practice, and THW type. It will need to be reviewed by OHA before being accepted as a qualifying CEU.
* Effective July 1, 2022, THWs applying for recertification are required to take a suicide prevention training as part of their CEUs.
* 10 hours of the CEUs can be from online courses (50%).
* 10 hours of the CEUs must be in class, with in-person interaction (50%).
* For questions regarding approved trainings, contact the THW program at: [THW.program@ODHSOHA.oregon.gov](mailto:THW.program@ODHSOHA.oregon.gov).

**Additional Resources**

* Traditional Health Worker Toolkit: [Oregon.gov/OHA/OEI/THW%20Documents/Traditional-Health-Worker-Toolkit-2019-Final.pdf](https://www.oregon.gov/oha/OEI/THW%20Documents/Traditional-Health-Worker-Toolkit-2019-Final.pdf)

**To connect with your regional PacificSource THW Liaison:**

Email [THWinfo@PacificSource.com](mailto:THWinfo@PacificSource.com)

Or call **541-640-8742.** TTY: **711**. We accept all relay calls.