



Health Care Employers'

Toolkit

for Onboarding
Care Coordinators



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This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$1,545,000 with 100 percent funded by HRSA/HHS and \$0 amount and 0 percent funded by nongovernment source(s). The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA/HHS, or the U.S. Government.



Dear Partner,

Thank you for your commitment to strengthening the rural health workforce. Persistent challenges in recruiting, training, and retaining qualified care coordinators and care managers continue to impact access to high-quality care in rural communities. In response, we developed a structured, scalable career pathway through the Care Coordinator Registered Apprenticeship model.

With approval of the Care Coordinator as a New York State Department of Labor (NYS DOL) Registered Apprenticeship program, this onboarding packet is designed to serve as a practical guide for employers welcoming new care coordination staff. The registered apprenticeship model ensures that care coordinators gain meaningful on-the-job experience while simultaneously completing structured, competency-based training that aligns with real-world job expectations and advancement opportunities.

Employers who choose to sponsor and hire a registered apprentice will complete both the on-the-job training and related instruction components outlined in this packet. Employers hiring care coordinators outside of the registered apprenticeship may also use these materials as a best-practice training and orientation resource.

We appreciate your partnership in building a strong, sustainable care coordination workforce for rural communities.

Sincerely,

Victoria Knierim

Director, HRSA Rural Health Programs



CARE COORDINATION & CARE MANAGEMENT WORKFORCE DEVELOPMENT RESOURCES & TOOLS

For Providers, Educators, and Workforce Developers

Overview

AHI's North Country Care Coordination Workforce Collaborative (NCWC), in partnership with the Health Workforce Collaborative, has created a care coordination and care management workforce development resource tool providing easy access to promote and source recruitment, training, and retention resources, including:

- Training Solutions
- Best Practice Protocols
- Recruitment Support
- Career Promotion

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The Health Workforce Collaborative is a digital workforce development platform designed to convene and engage community stakeholders in collaborative efforts. By joining the Health Workforce Collaborative you can:

Promote Your Organization

Helping you gain the attention of career seekers, health professional students, and healthcare workers who are exploring, preparing, and advancing their health careers.

Explore Solutions

Helping you solve your recruitment, training, and retention challenges with solutions listed by workforce development organizations, training providers, and peers.

Collaborate with Partners

Helping you find and connect with local, regional, and statewide workforce developers and training providers to grow and develop a quality health workforce together.

Let's grow, recruit, train, and retain a thriving health workforce together.

www.hwcollab.org/care-coordination-management



Greetings!

AHI's North Country Care Coordination Workforce Collaborative (NCWC), in partnership with the Health Workforce Collaborative, is pleased to extend an invitation to you to participate in our initiative aimed at advancing the fields of Care Management and Care Coordination. As a partner dedicated to advancing these fields, your involvement is critical in the implementation of a comprehensive platform designed to serve as a central hub for career awareness, education, and professional development.


We are reaching out to healthcare employers, workforce development organizations, and education institutions to join the Health Workforce Collaborative. Your participation will assist us in curating resources, opportunities, and career training and certification programs that prospective and current Care Managers and Care Coordinators can utilize to enhance their career exploration and professional skills.

To get started and promote your organization, as well as any relevant opportunities or resources such as trainings, certification programs, career opportunities, or career exploration/preparation resources, we kindly request that you create an account on the Health Workforce Collaborative by selecting the appropriate sign up page below:

- If you are a **healthcare provider/employer**, sign up here:
<https://hwcollab.org/join/employers/>
- If you are a **workforce development organization**, sign up here:
<https://hwcollab.org/join/workforce-developers/>
- If you are an **education institution**, sign up here:
<https://hwcollab.org/join/educators/>

Our partner, Health WorkForce New York (HWNY), has created this walk-through video demonstrating the sign-up process, which you can use as a guide: <https://vimeo.com/998731846/3fcb942866?share=copy>

"This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$1,545,000 with 100 percent funded by HRSA/HHS and \$0 amount and 0 percent funded by nongovernment source(s). The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA/HHS, or the U.S. Government".



Once signed up on the platform, we encourage you to take advantage of the following value-adding opportunities:

- 1. Promote Your Programs:** Showcase your opportunities, openings, resources, and content within our marketplace.
- 2. Collaborate and Connect:** Utilize our collaboration tools to network with partners, employers, and education institutions.
- 3. Gain Visibility:** Increase your visibility on our public platform, accessed by career seekers, students, and healthcare professionals seeking career information and advancement opportunities.

Your participation will make a significant impact on shaping the future of healthcare education and career advancement in our community, and we thank you in advance for your consideration and time in helping us grow these critical fields.

At any point, if you need any assistance creating your account and promoting your organization or institution on the Health Workforce Collaborative, please reach out to Tasnim Islam at Health WorkForce New York (HWNY) by emailing tasnim@hwny.org.

Warm regards,

Victoria Knierim
Director, HRSA Rural Health Programs



CARE COORDINATOR
(Time-Based)

APPENDIX A

O*NET-SOC CODE 29-2099.08

A Care Coordinator manages and organizes patient/client care between two or more participants involved in a person’s care (such as healthcare providers, social service providers, payers) and communicates information with/to everyone involved - including the patient/client - to help ensure safe, appropriate, and effective care.

This training outline is a minimum standard for Work Processes and Related Instruction. Changes in technology and regulations may result in the need for additional on-the-job or classroom training.

WORK PROCESSES

Approximate Hours:

A. Introduction to the Care Coordinator Role and Orientation to the Work Environment320

1. Orientation to the role of the Care Coordinator (customized to employer and population served).
 - a. Adhere to rules and regulations established by government agencies (such as the New York State Department of Health).
 - b. Learn job description and requirements.
 - c. Uphold Organization’s mission and core values, policies, procedures, business ethic codes, information security policies, and Health Insurance Portability and Accountability Act (HIPAA) and Americans with Disabilities Act (ADA) requirements/guidelines.
 - d. Demonstrate an understanding of the Care Coordinator’s role within the organization and the care team.
 - e. Understand and respect relationships between co-worker(s), mentor(s), and supervisors.
 - f. Utilize access to mentors, supervisors, employee assistance programs, and resources.
 - g. Understand and uphold the professional relationships and boundaries with clients/patients, and their family members.
 - h. Demonstrate effective organizational skills, time management, attention to detail, and ability to prioritize and manage multiple and competing demands.

- i. Demonstrate professional work habits including dependability, responsibility, the ability to work both independently and as part of a team, and the ability to maintain confidentiality in accordance with HIPAA regulations.
2. Specialized and technical knowledge unique to the work environment.
 - a. Learn characteristics of the individual(s) and population(s) served.
 - b. Demonstrate knowledge and understanding of medical terminology.
 - c. Have familiarity with patient/client entitlements, such as Supplemental Security Income (SSI) and Medicaid, sources of potential funding, and eligibility requirements for services to patients/clients.
 - d. Proficiently utilize computers and technology necessary for the work environment, such as electronic medical records, databases, videoconferencing, telehealth, and Microsoft applications.
 - e. Maintain accurate, clear, and timely documentation of client/patient interactions and progress within multiple concurrent platforms.
 - f. Secure all health records and other protected information with the highest regard to confidentiality and HIPAA laws and regulations.
 - g. Acquire and utilize knowledge of community-based resources related to housing, transportation, nutrition, disability supports, financial assistance, etc. (based on population served and/or work environment).
 3. Employee and individuals' safety in any environment in which care/services are provided (based on employment location)
 - a. Practice effective universal precautions/infection control.
 - b. Employ CPR/Basic First Aid (if/when necessary)
 - c. Understand health, safety, and medical concerns unique to the work environment.
 - d. Exercise safety precautions in all service delivery settings.
 - e. Understand and follow employer's procedure(s) for emergencies, if/when necessary.
 - f. Understand and utilize crisis intervention, if/when necessary, in accordance with employer policies and procedures.

**B. Development of Community-based Networking and Advocacy
(customized for specific region and employer)..... 815**

1. Community Networking
 - a. Develop and maintain effective relationships and communication with external organizations, such as hospitals, external specialty providers, and social service agencies, to facilitate service coordination, referrals, and a positive outcome for clients/patients.
2. Advocacy, and Supporting Empowerment
 - a. Promote empowerment and self-confidence of clients/patients/responsible party to help them work toward problem solving, self-advocacy, and self-management skills.

- b. Identify and address gaps in care and/or services to provide relevant community and/or health care resources.
- c. Help client/patient/responsible party to understand and access available services and supports.

3. Outreach and Education (customized to employer and population served)

- a. Provide outreach, information, guidance, and education to the client/patient and/or family, and other members of the care team for appropriate healthcare utilization, chronic disease (e.g., diabetes, hypertension) self-management skills, effective care transitions, assessment, and elimination of barriers, including socio-economic barriers, quality of care, and cost control.
- b. Provide coaching, information, and referral services to clients/patients to promote wellness, preventive care, and to manage various chronic and/or behavioral health conditions.
- c. Elicit, respect, and actively support client/patient/responsible party choices and preferences.

4. Communication

- a. Choose and use effective and appropriate written, verbal, and interpersonal communication skills; demonstrate good listening skills and a willingness to be helpful, flexible, and patient.
- b. Facilitate basic group communication.
- c. Ability to develop and maintain trust with the population(s) and community served.
- d. Effectively engage people in the care coordination process.
- e. Learn and utilize health literacy and health equity principles for clear and inclusive communication.
- f. Maintain ongoing communication between the client/patient/responsible party and the care team.
- g. Use alternative communication devices and technologies, as applicable.
- h. Obtain and appropriately use interpreters when needed.
- i. Address and resolve conflict in a professional and ethical manner.

C. Interdisciplinary/Multidisciplinary Teamwork and Collaboration 125

- 1. Demonstrate an understanding of the role and scope of practice of all members of the care team, including nurses [e.g., licensed practical nurses (LPN), registered nurses (RN)]; providers [e.g., physicians, nurse practitioners (NPs), physician assistants (PAs)]; social workers [e.g., licensed clinical social worker (LCSW)], mental/behavioral health providers, etc. Recognize the client/patient as a contributing member of the care team.
- 2. Work closely and collaboratively with the care team and build effective and positive relationships among care team members to support positive outcomes for clients/patients.

3. Attend and actively participate in individual, group, and team meetings.

D. Assess and Identify Client Strengths, Needs, Concerns, and Preferences..... 350

1. Screen potential clients for care coordination needs to determine the appropriateness of and eligibility for services.
2. Ensure informed consent and appropriate disclosures (e.g., explain to the client/responsible party the role of the care coordinator, the scope of services provided, costs (if any) for care coordination services, and the client's/responsible party's rights and responsibilities).
3. Conduct a comprehensive assessment of client/patient and family's unmet health and social needs using standardized assessment tools provided and/or recommended by the organization.
 - a. Assess the client's ability to participate in developing the care plan and identify alternative decision makers if client has limited ability or lacks decisional capacity.
 - b. Collect additional information and data by contacting relevant sources, e.g., physician(s), other care providers, and social support systems.
 - c. Synthesize and interpret information and data.

E. Establish Goals and a Plan of Care..... 700

1. Collaborate with client/responsible party to develop individualized, goal-oriented, client/patient-centered care plans that promote positive outcomes and address physical health, mental health, and socio-economic barriers.
2. Identify options and resources that address the areas identified for intervention and provide appropriate information and referrals.
3. Discuss with the client/responsible party the advantages, disadvantages, and costs of available, and appropriate options and resources.
4. Develop and prioritize action steps with the client/responsible party to achieve the agreed upon care plan goals.

F. Implement, Manage, and Monitor Ongoing Progress and Outcomes of Care Plan..... 450

1. Coordinate and facilitate services and interventions.
2. Communicate goals of the care plan with the client's support system and the care team.
3. Monitor service delivery and interventions.
4. Monitor client's/patient's adherence to their care plan and their progress toward goals in a timely fashion, and facilitate changes as needed.

5. Cultivate and support care coordination with patient care team through timely communication, inquiry, follow-up, and integration of information into the care plan regarding transitions in care and referrals.
6. Maintain an ongoing responsibility for assigned caseload by prioritizing referrals and activities according to intensity, needs, and required follow-up.
7. Evaluate client satisfaction with services.
8. Develop a process for termination and/or tapering of services.

G. Maintain Ethical and Professional Practice Standards 290

1. Promote client autonomy and right to self-determination.
2. Recognize and respect diversity with respect to factors such as culture, religion, race, ethnicity, national origin, age, disability, gender, gender identity, sexual orientation, and socioeconomic status, to uphold the client’s value system, preferences, and choices.
3. Identify and work to resolve ethical dilemmas using consultation and supervision when appropriate.
4. Document professionally relevant information about the client/client system (e.g., assessments, care plans, services and supports provided, communications with the client and other parties, referrals made, outcomes, reasons for the termination of services).
5. Evaluate service quality and effectiveness.
6. Practice self-assessment and accountability for job performance; accept appraisal of performance and accept and incorporate constructive feedback.

H. Provide Crisis Management and Conflict Management..... 200

1. Ability to effectively address and manage crisis situations, in accordance with organization policies.
2. Utilize de-escalation strategies and techniques to reduce agitation and/or aggression in the community care setting.

Approximate Total Hours 3250

Apprenticeship work processes are applicable only to training curricula for apprentices in approved programs. Apprenticeship work processes have no impact on classification determinations under Article 8 or 9 of the Labor Law. For guidance regarding classification for purposes of Article 8 or 9 of the Labor Law, please refer to <https://dol.ny.gov/public-work-and-prevailing-wage>

CARE COORDINATOR

APPENDIX B

RELATED INSTRUCTION

Safety, Health, and the Workplace

1. Government-specific Laws, Codes, and Regulations
2. Organizational Onboarding
3. First Aid and CPR (6.5 hours every 3 years)
4. Opioid Overdose Prevention
5. Sexual Harassment Prevention Training – must comply with Section 201-g of the labor law.
6. HIPAA and Confidentiality
7. Technology, Documentation, Confidentiality, Privacy and Security, and Electronic Health Records
8. Mental Health First Aid/Suicide Prevention Training
9. Mandated Reporter Training
10. Professionalism and Ethics
11. Safety in the Field

Occupational Theory and Science

1. Introduction to Care Coordination (defining the care coordinator roles, tasks, and key responsibilities).
2. Value-based Care
3. Managing Chronic Disease
4. Patient-centered Medical Home Concepts
5. Patient-centered Care Planning
6. Trauma Informed Care
7. Boundaries and Dual Relationships
8. Social Determinants of Health (SDOH) and Impact on Social Care NetworksHealth Behavior Change (factors relating to why clients/patients change or do not change).
9. Quality, Accountability, Performance and Process Improvement, and Evidence-Based Practice

Occupational Skills

1. Cultural Competency and Health Literacy
2. Diversity, Equity, Inclusion, and Accessibility (DEIA) Training
3. Teamwork, Communication, and Collaboration; Interdisciplinary Teams
4. Assessments: How to Conduct Them and Which Ones Are Important
5. How to Develop and Implement a Care Plan

6. How to Access and Use Regional Clinical Data Resources (e.g., Hixny).
7. SDOH Screening and Referral; training on Social Care Network Health Related Social Needs Services (HRSN)
8. Documentation: How to Write Effective Progress Notes; Objective Documentation
9. Motivational Interviewing
10. Health Coaching
11. Verbal De-escalation, Crisis Intervention, Safe Environment and Conflict Management
12. Medication Management Training for Care Manager
13. Networking and Knowledge of Community Resources
14. Payment Systems (e.g., value-based payments, insurance plans)

Topics Specific to Work Setting

For Example:

- a. Understanding the Dynamics that Cause and Maintain Poverty (such as “Bridges Out of Poverty”)
- b. Specific Chronic Diseases/Conditions
- c. Screening, Brief Intervention, and Referral to Treatment (SBIRT) Training
- d. NARCAN Training
- e. Self-Care
- f. Addressing Burnout
- g. Workplace/Career Wellbeing
- h. Complex and Comprehensive Care Transition Codes
- i. Billing and Coding

Additional Topics as Required

A minimum of 144 hours of Related Instruction is required for each Apprentice each year.

Appendix B topics are approved by New York State Education Department.

You can help connect people with the care they need.

Become a health care coordinator or care manager.

Looking for a career where you can truly make a difference?

As a Care Coordinator, you'll play a vital role in helping people connect with the care they need. It's a job filled with purpose—supporting patients, building meaningful relationships, and solving problems in a way that improves lives every single day.

“I love helping clients and families get what they need.”

Julia Rutter, Care Coordinator
Queensbury, NY



Explore a career in care coordination and care management.

www.CareCoordinatorCareer.com



CARE

COORDINATORS:

Helping connect people with the care they need.

Looking for a career where you can truly make a difference?

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“There are so many
ways to grow
and advance
in this field.”

Theresa Clayton, Care Manager
Glens Falls, NY



Explore a career in care coordination
and care management.

www.CareCoordinatorCareer.com





Frequently Asked Questions (FAQs)

Registered Apprenticeship Program for Care Coordinators

Prepared by Adirondack Health Institute (AHI)
518-480-0111 x701 | vknierim@ahihealth.org

1. What is a Registered Apprenticeship (RA)?

A Registered Apprenticeship is a paid, full-time job combined with structured on-the-job training and classroom-based related instruction. Programs are conducted by employers (called sponsors) and follow industry-specific training outlines approved by the New York State Department of Labor.

2. What job titles does the Care Coordinator apprenticeship apply to?

Positions eligible for the Registered Apprenticeship for Care Coordinators may have titles such as:

- Care Coordinator
- Community Care Coordinator
- Patient Care Coordinator
- Clinical Care Coordinator
- Care Manager
- Nurse Care Manager
- Complex Care Manager
- Health Home Care Manager
- Case Manager
- RN Case Manager

3. What funding and tax incentives are available for employers?

- *Empire State Apprenticeship Tax Credit (ESATC)*: For RA sponsors or signatories employing apprentices for at least six months; enhanced credits available for disadvantaged youth and apprentices with mentors.
- SUNY funding to apprenticeship sponsor (\$1,500)
 - * Funding is grant-based and availability may vary, early inquiry is recommended.

4. What financial support is available for apprentices/employees?

- The State University of New York (SUNY) System funds the cost of the Related Instruction (RI) required in the Registered Apprenticeship program: **\$6,000** or **\$8,000** per apprentice, depending on the trade/occupation.
 - » Funding covers the entire duration of the apprenticeship (and beyond).
 - » Payments go directly to the community college providing the training, ensuring that apprentices have no out-of-pocket tuition costs.
- SUNY also funds Pre-Apprenticeship programs to help individuals prepare for apprenticeships:
 - » \$1,000 per pre-apprentice for tuition, fees, and books at any SUNY school.

5. What are other benefits for employers?

Employers who participate as sponsors or partners in the RA program can:

- Provide attractive option to help recruit dedicated employees
- Improve employee retention and attendance
- Train staff using a structured, consistent program tailored to your organization
- A high-quality pipeline of skilled workers and improved workforce culture

6. What are other benefits for apprentices (employees)?

Apprentices in the Care Coordinator pathway will:

- Earn a salary while they train
- Increase their pay as they learn more skills
- Receive at least 144 hours of related instruction per year
- Train under the supervision of skilled healthcare professionals
- Graduate with a Certificate of Completion from NYS and a Journeyman's card, a recognized credential for advancement
- Training may lead to stackable credentials or a degree
- Complete training with little to no student debt

7. How do healthcare employers become sponsors?

To establish a Registered Apprenticeship program:

- Submit an application to NYSDOL to sponsor a Registered Apprenticeship and have a site visit
- Once approved, promote the opportunity to new prospective employees, as well as current employees to upskill/for potential career growth opportunities

8. How long does the Care Coordinator apprenticeship last?

This program can be completed in approximately 20 months while working full-time, complete structured on-the-job training, and finish required related instruction hours before earning a Certificate of Completion.

9. Who oversees and funds the program?

The program is administered by the New York State Department of Labor (NYSDOL), with funding support from the SUNY system and federal workforce grants. Adirondack Health Institute (AHI) serves as a regional partner helping healthcare employers and apprentices successfully navigate the process.

10. It sounds complicated. Who handles what in the apprenticeship system?

A dedicated navigator from the Department of Labor handles registration, program approval, implementation, and monitoring. SUNY provides guidance on appropriate courses and how to access them. Employers (Sponsors) are only responsible for providing the apprentice with on-the-job training (OJT).

11. Where can I learn more or get started?

Contact **Victoria Knierim, MS**
Director, HRSA Rural Health Programs
Adirondack Health Institute
vknierim@ahihealth.org
518.480.0111 x.701



Contacts & Support

For resources and assistance with healthcare workforce development in the North Country:

Adirondack Health Institute

Serving Clinton, Essex, Franklin, Fulton, Hamilton, Montgomery, Saratoga, St. Lawrence, Warren, and Washington counties

Contact:

Victoria Knierim, MS
Director, HRSA Rural Health Programs
(518) 480-0111 x701
vknierim@ahihealth.org

For information about the NYS Registered Apprenticeship Program:

New York State Department of Labor

Visit: dol.ny.gov/apprenticeships

Email: ATCO@labor.ny.gov

Call: Albany Field Office
518-457-4497 or 518-457-8914

State University of New York

Visit: www.suny.edu/apprenticeship/healthcare/

Email: apprenticeship@suny.edu

Submit an inquiry form:

