



**Certified Peer and Family Specialist
Certification Process Manual**

*Revised September 2022

I. Introduction

Thank you for your interest in becoming a Certified Peer and Family Specialist (CPFS) in Colorado, your work is so important in supporting people in their recovery from substance use and behavioral health disorders. We are here to assist you in any way we can through your certification process. The Colorado Providers Association (COPA) recognizes the professional contributions of peers in Colorado communities. This certification represents that a CPFS has met the required training and supervision standards to serve individuals in their treatment and recovery processes.

Certification credentials are based on experience and competencies as set by the International Certification & Reciprocity Consortium (IC&RC). All applicants are required to demonstrate that they have completed the training requirements, have had the appropriate amount of supervision, and have passed the IC&RC exam. The Colorado Peer and Family Specialist Certification Committee (Committee) is a subcommittee of COPA that approves certification for trained CPFS by reviewing training, continuing education, supervision, and work experience; facilitating examinations; and promoting reciprocity with other jurisdictions.

In order to receive your certification you must demonstrate the following:

Education

- All applicants must have a high school diploma or jurisdictionally certified high school equivalency.
- Each applicant must demonstrate 60 total hours of training within each of the domains:
 - 10 hours of Advocacy
 - 10 hours of Mentoring and Education
 - 10 hours of Recovery and Wellness Support
 - 16 hours of Ethics
 - 14 hours of additional training
- Applicants who are applying for their initial certification must complete at least 30 hours of training in interactive, online or in-person, non-self-paced training.
- Candidates must submit their initial 46 hours in the four domains of training from an approved trainer or training organization.
- Note: Additional topic areas include: trauma-informed care, cultural sensitivity, whole health, substance use, mental health, and family support if not already covered.
- Trainings must have occurred in the previous 5 years of submission.
- Trainings focused on clinical, social work, or treatment will not be accepted for the certification
- A list of Pre-Approved Trainings can be found [Here](#).

Experience

- Applicants must have a minimum of 6 months of paid or volunteer experience.
- Applicants must demonstrate at least 500 hours of volunteer or paid work experience specific to the domains listed above.
- Volunteer or paid work experience must be demonstrated over at least a six-month period.

Supervision

- Applicants must demonstrate at least 25 hours of supervised volunteer or paid work experience specific to the domains and must be submitted in the application.
- For supervision to be eligible for certification, the supervisor must have knowledge of the CPFS role and work, as well as understand the principles and philosophy of recovery and the Code of Ethics for CPFS in Colorado.

- The focus of the supervision requirement will be on work performance and professional development and will demonstrate an individual's ability to perform the services of an effective peer, based on the requirements set forth by IC&RC.
- For supervision to be eligible for certification the employing and/or supervising organization must have a grievance policy that aligns with the Code of Ethics provided by COPA.

Code of Ethics

- Each applicant must sign the Code of Ethics to demonstrate their understanding of best practices in ethics for CPFS.
- Each employing and/or supervising organization must provide a copy of its grievance policy to be approved by the Committee.

Lived Experience

- Lived experience means at least one of the following applies:
 - The applicant has a personal history of drug or alcohol addiction and recovery.
 - The applicant has a personal diagnosis of a mental health condition and recovery.
 - The applicant has personally provided care or services to a child, youth, or adolescent with a drug or alcohol addiction or mental health condition.
- Lived experience statement will clearly demonstrate how their recovery and certification make them ready to provide peer services and how they will use their lived experience to assist others in their recovery journey.

IC&RC Exam

- New applicants who have not been previously certified in Colorado or a reciprocal jurisdiction must complete the IC&RC Peer Recovery Certification Exam.

The Certification Committee meets every month to conduct application reviews. The Committee meeting schedule and submission deadlines can be found on COPA's CPFS website. Should you wish to have your application reviewed by the Committee, it must be completed 10 days prior to the next committee meeting. If the application is not complete by the 10-day deadline, it will not be eligible for review until the next meeting.

In the following sections, you will find detailed instructions to apply for your certification. All applicants are highly encouraged to review the information on the [COPA website](#) AND this manual before starting an application.

The COPA Certification Manager holds Office Hours to assist you in your certification process Monday-Friday from 9 AM to 5 PM. To schedule an in-person or zoom appointment, or for any other assistance, please contact Jacob at jacob@coprovidersassociation.org.

II. Certemy

COPA uses a Certification Management System called Certemy to process all of the applications for the CPFS in Colorado. In order to begin an application, you must open an account with Certemy. This account will remain active and maintain all of your certification information throughout the application and recertification process.

A. Setting Up Your Certification Account

- After reviewing the website and the information contained in this manual, you will open a Certemy account to begin your application.
- Click on the Apply Now button located on several pages of the website which contains the application link.
- When Certemy asks if you have an account, click No.
- This takes you to the following registration page. Fill in the requested information and click **Create Account**.
 - *NOTE:* Applicants are highly encouraged to use a personal, more permanent email address for their application/certification account in order to circumvent strict firewall protections, and to allow for long-term access regardless of employment.
 - *Changing the Email Address on your Certemy Account:* Should you wish to change the email address currently attached to your Certemy account, complete the following steps:
 - ★ Contact Certemy at support@certemy.com or call (866) 907-4088.
 - ★ Provide them with your certification, your name, the current email on your account, and the email address you wish to now have attached to the account.
- Next, you will see a screen that asks you to verify your email to complete the registration. An email link will be sent to the email address you used for your account registration. Click on **Complete Registration**.
- You will be asked for some additional information for your professional profile. Then, read the Terms & Conditions, and check the **I accept** box.
- Now you will be taken to the homepage of your Certemy Account. This page lists each step required to complete your application.

There are 14 application steps. 12 of the 14 steps must be complete (including payment of all fees) before the application can be considered for Committee review. Committee approval is completed by the Certification Manager, the IC&RC Exam step is completed by the applicant after passing the exam.

B. Using Your Certemy Account

There are a lot of functions available on your Certemy account homepage.

- The **My Credentials** tab in the taskbar at the top of your screen will take you to your homepage.
- The **Digital Wallet** tab is where all your uploaded documents and payments can be found. They will remain within the application as well as in the **Digital Wallet** for your immediate access.
 - Once your certification is finalized, your Certified Peer & Family Specialist Certificate will also be located here.

- The **Transcripts** tab is where any educational verification documents will be kept.
- The **Profile** tab is where you can manage profile information and **Email Notification Settings**.
 - It is important to review the **Email Notification Settings** tab to ensure that you are receiving notifications that are important to you. If you do not want to receive any Certemy notifications uncheck the **Enable all notifications** box.

III. Required Documents

In order to complete your certification, the Committee will assess the following documents. In rare cases, the committee might request additional information about a particular training and how it relates to the field, or for additional verification of training. They can also request clarification of something disclosed within the questionnaire or experience steps. When this occurs, you will receive notification from the Certification Manager with guidance about how to proceed. The committee has one opportunity to ask clarifying questions or for additional information and will make their final decision by the following Certification Meeting.

Required Documentation for the Certemy Process:

A. Formal Education - High School degree/GED or higher

- Name of institution
- Date of graduation
- Copy of diploma or transcript

B. Training

- 60 training hours specific to the IC&RC Domain:
 - Name of training(s)
 - Name of the organization providing the training(s)
 - Dates of training(s)
 - Hours completed for each training

C. Training Verification and Training Certificate Information

Acceptable Forms of Training

- Webinars
- Online, self-paced trainings
- Live/virtual conferences
- Live/virtual trainings

Certificates of completion are required for each training submitted for clock hours.

Certificates of completion must include:

- Training center
- Trainer's name
- Applicant's name
- Hours completed and date of training
- Conference or training agendas/brochures DO NOT meet the requirements for evidence of training completion.

Trainings NOT Accepted:

- Offline, self-paced trainings
- Independent studies
- Community meetings
- Motivational speakers
- Clinical focused, CAS and CAT courses

D. Work Experience Information

500 hours of work experience (volunteer or paid) specific to the IC&RC domains over a minimum of 6 months.

- Name of Organization(s)
- Number of hours completed in each domain
- Supervision verification - completed within the application

E. Supervision Information

25 hours of supervision specific to the IC&RC Domains must be submitted within the application.

- Name of organization(s)
- Supervisor specifics
- Number of hours of group and/or individual supervision completed for each domain
- Supervisors will be required to submit their Resume/CV for Committee review to confirm they meet the experience requirements for supervising peers. The supervisor(s) will receive a link to verify your experience and supervision. It is important to note this link will expire after 14 days. Should the link expire, contact the Certification Manager at jacob@coprovidersassociation.org.

F. Lived Experience

A paragraph (250 words or less) briefly describing your lived experience, which should include the following:

- History of a substance use disorder, or mental health disorder, or a caregiver to a person with substance use/mental health.
- Amount of time in recovery and engagement in personal recovery
- Why do you want to be a Peer and Family Specialist
- How will you use your lived experience to assist others in your role as a peer

G. Signed Code of Ethics

H. Completion of the IC&RC Exam

IV. Step-By-Step Process

When you are ready to complete an application step, simply click on the step on the Certemy Webpage.

A. Registration Fee

- Click on **Pay Fee**
- Enter your credit card information
- Your payment receipt will show up in your **Digital Wallet**
- You can download this receipt for your records at any time
 - If an employer or other arrangement has been made for the payment of your application fees, click on 3rd Party Payment

- When prompted, provide a comment about who will be submitting the payment
- Applicants **MUST** contact the Certification Manager at jacob@coprovidersassociation.org to make arrangements for the completion of this payment process
- The Certification Manager will provide you with the documentation needed to complete a third-party payment

B. CPFS Application

- Click on the **Complete Now** button to complete this section of the application.
- NOTE: Applicants are required to use their legal name that matches their government-issued photo ID (i.e. Driver's License, Passport, Military ID, etc.) This is extremely important.
 - The name on your application is the name used for pre-registration for your examination.
 - Should this name not match your government-issued photo ID, you will not be permitted to sit for the examination.
 - This can result in canceled exams, delay in certification, and additional examination fees on the part of the applicant.

C. Questionnaire

- Click on the **Complete Now** button to complete this section of the application.
- These are all yes/no questions, with additional information required depending on the applicant's answer.
- Applicants are required to provide truthful answers related to alternative professional licenses or certifications in other jurisdictions, use of illegal substances, involvement in any final judgments or legal actions rendered against the applicant, etc.
- Providing false or misleading responses will result in the applicant no longer being eligible for the certification or, in the case of recertification, the applicant's current certification can be revoked.

D. Formal Education

- Click on the **Drop files to attach**, or **Browse to attach the document**, then click **Upload**.
- NOTE: Once a document is uploaded into a step and the applicant refreshes the page, the step will say "pending" and will remain in the Pending status until that step is either Approved or Rejected.

E. Experience

This section is to be completed by your supervisor. It is strongly suggested the supervisor fills out all fields to avoid any delays in the process.

- Input the required contact information for your supervisor.
- Put in the total number of hours
- Scroll back to the bottom of the page
- Click **Send Invitation**

- Notify your supervisor that they will be receiving this invitation and that the link will expire in 14 days. Should they not complete the section within that time frame, you will need to re-send the link. If you are unable to resend the link, contact the Certification Manager at jacob@coprovidersassociation.org.
- Please note: If your supervisor does not accept the invitation, a new invitation will not be able to be sent to the same email address. A new email address for your supervisor will need to be created.

F. Supervised Experience

This section is to be completed by your supervisor. It is strongly suggested the supervisor fills out all fields to avoid any delays in the process.

- Input the required contact information for your supervisor.
- Scroll back to the bottom of the page
- Click **Send Invitation**
- Notify your supervisor that they will be receiving this invitation and that the link will expire in 14 days. Should they not complete the section within that time frame, you will need to re-send the link. If you are unable to resend the link, contact the Certification Manager at jacob@coprovidersassociation.org.
- Please note: If your supervisor does not accept the invitation, a new invitation will not be able to be sent to the same email address. A new email address for your supervisor will need to be created.

G. Lived Experience

- In order to complete this section, read all instructions carefully about what is required for the Lived Experience statement.
- Please focus on how the lived experience will be used to assist others in their recovery journey
- When ready to submit your statement, click on the **Complete Now** button.

H. Advocacy Training (10 hrs)

- In this section, applicants will submit the training hours specific to Advocacy.
- Fill in each section that has an *
- Upload evidence of your training, i.e. certificate of training
- Click on the **Drop files to attach**, or **Browse to attach the document**, then click **Continue** to finalize the step
- Do not add these hours to other sections of the training domains. One course is only allowed to be used per application

I. Ethical Responsibility Training (16 hrs)

- In this section, applicants will submit the training hours specific to Ethical Responsibility
- Fill in each section that has an *
- Upload evidence of your training, i.e. certificate of training
- Click on the **Drop files to attach**, or **Browse to attach the document**, then click **Continue** to finalize the step

- Do not add these hours to other sections of the training domains. One course is only allowed to be used per application

J. Mentoring and Education Training (10 hrs)

- In this section, applicants will submit the training hours specific to Mentoring and Education
- Fill in each section that has an *
- Upload evidence of your training, i.e. certificate of training
- Click on the **Drop files to attach**, or **Browse to attach the document**, then click **Continue** to finalize the step
- Do not add these hours to other sections of the training domains. One course is only allowed to be used per application

K. Recovery/Wellness Support Training (10 hrs)

- In this section, applicants will submit the training hours specific to Recovery/Wellness Support
- Fill in each section that has an *
- Upload evidence of your training, i.e. certificate of training
- Click on the **Drop files to attach**, or **Browse to attach the document**, then click **Continue** to finalize the step.
- Do not add these hours to other sections of the training domains. One course is only allowed to be used per application

L. Additional Training Requirements (14 hrs)

- In this section, applicants will submit the training hours additional to the domains above
- Additional topic areas must include trauma-informed care, cultural sensitivity, whole health, substance use, mental health, and family support if not already covered
- Fill in each section that has an *
- Upload evidence of your training, i.e. certificate of training
- Click on the **Drop files to attach**, or **Browse to attach the document**, then click **Continue** to finalize the step
- Do not add these hours to other sections of the training domains. One course is only allowed to be used per application

M. Code of Ethical Conduct

- Download and review the CPFS Code of Ethics
- Click on the **Complete Now** button
- Answer acknowledgment statements about adhering to the code of conduct
- Click **Continue** to finalize this section

N. Application Fee

- Click on **Pay Fee**
- Enter your credit card information

- Your payment receipt will show up in your **Digital Wallet**
- You can download this receipt for your records at any time
 - If an employer or other arrangement has been made for the payment of your application fees, click on 3rd Party Payment
 - When prompted provide, a comment about who will be submitting the payment
 - Additionally, applicants MUST contact the Certification Manager at jacob@coprovidersassociation.org to make arrangements for the completion of this payment process
 - The Certification Manager will provide you with the documentation needed to complete a third-party payment

O. Finalizing the Certification

- If all of the above steps have been completed correctly, the application is ready for Committee review
 - To be eligible for review, applications must be submitted 10 days before the scheduled committee meeting which occurs each month
 - The committee meeting schedule and submission deadlines can be found on COPA's website
- After the Committee has approved the application the COPA Certification Manager will process the Committee Approval step in the application

P. Notification of Application Acceptance, request for more information, or Rejection

- Applicants shall be notified of the acceptance, request for more information, or rejection of an application within 10 business days of the Committee's decision, no later than 2 months from the original application date
- The COPA Certification Manager will pre-register you for the exam with SMT and notify you that you are approved to take the exam and have been pre-registered

Q. IC&RC Exam Information

- Once you receive the registration link from SMT, you have 1 year to take the exam
- To schedule and sit for the exam:
 - You must register using your legal name as listed on your government-issued photo ID (i.e. driver's license, passport, military ID, etc.)
 - If the name on the application/registration does not match your photo ID, the testing site will not allow you to sit for the exam. You will then be required to reschedule and pay an additional examination fee. Additionally, professionals needing to retake the exam must wait 90 days after the originally scheduled test date
- This computer-based exam is administered statewide
- The testing fee is included in the initial application fee. Subsequent exams will have to be paid for by the applicant
- Examination Content:
 - 75 questions + 10 pre-test questions
 - 2 hours to complete

- **The exam includes the following four domains:**
 - Advocacy
 - Recovery/Wellness Support
 - Mentoring & Education
 - Ethical Responsibility
- Special Accommodations may be available. Please contact the Certification Manager before pre-registration for additional information at jacob@coprovidersassociation.org

Congratulations - You're officially a Certified Peer and Family Specialist!

When you pass your exam the Certification Manager will notify you of your exam results. Upload your passing examination letter from SMT into the IC&RC Exam step within the application. The Certification Manager will finalize the certification. You will then be able to access your CPFS Certificate in the **Digital Wallet** in their Certemy account. Download a copy of the certification for your records.

V. Recertification Information

A. Recertification Timeline

- CPFS certification is valid for 2 years.
- Renewal dates are based upon the initial certification date.
- You can add continuing education training to the online application system at any time during the two-year recertification cycle.
- If the recertification requirements are met prior to the expiration date, your application will be reviewed by the Committee.
- It is recommended that the recertification application be submitted at least 3 months prior to the expiration date. This prevents the certification from expiring.

B. Recertification Hours Requirements

- 30 hours of continuing education trainings/workshops within the last two years
- 6 hours of the 30 hours must be in the ethics domain
- Hours should correspond to the IC&RC Domains

C. Training Restrictions & Limitations

- Offline, self-paced trainings, independent studies, or community meetings are NOT acceptable forms of training.
- Continuing education hours must have occurred during the two years between the certification date (or previous renewal date) and the date of expiration. For example, if the CPFS certificate was earned in June 2019, then the continuing education hours submitted must have been earned between June 2019- June 2021.
- Submission of duplicate courses taken within the two-year renewal cycle are not permitted (e.g., Boundaries 2017 and Boundaries 2018).
- CAS and CAT, and/or clinical courses are NOT permitted for recertification.

D. Training Documentation – Certificates of Attendance

- Certificates of attendance/completion are required to verify training hours.
- Certificates of completion should include the following:
 - Training center/organization name
 - Trainer's name
 - Professional's name
 - Hours completed
 - Date of training
- Conference or training agendas/brochures do not meet the requirements for evidence of training completion.

If you do not have a certificate of training, please contact the Certification Manager at jacob@coprovidersassociation.org.

E. Recertification Fees

- \$200 Renewal Fee

F. Lapsed Certifications:

- All certified professionals should review the recertification application well in advance of the expiration date.
- A Reinstatement Fee of \$50 is due if the recertification is late between one day and 12 months.
- After 12 months, recertification is not possible, and an applicant will have to reapply for the certification, meeting all current requirements.

VI. Recertification Process

To start the recertification process, sign in to your account in the online Certemy application system. If you are unable to remember your password, click **Forgot Password**. This will send a reset link to the email address associated with your account. Should you no longer have access to the email on your Certemy account, you will not be able to access your recertification application.

Note: If you have any issues logging into your Certemy account, contact Certemy at support@certemy.com or call (866) 907-4088. Provide the certification, your name, and email address you are attempting to sign in with. If you do not hear back from Certemy, please contact the Certification Manager at jacob@coprovidersassociation.org for further assistance.

A. Update Contact Information

- Professionals are required to check all of their contact information currently on file and make any updates necessary.

B. Educational Training Requirements

- Upload the training information for each training certificate.

C. Code of Ethical Conduct

- Download, review, and sign the most recent Code of Ethical Conduct and answer the questions to demonstrate understanding of the ethical practice codes.

D. Recertification Fee

- Pay the \$200 renewal fee.
 - If using a Third-Party Payer, select the Third-Party Payer tab and proceed from there.
 - Inform jacob@coprovidersassociation.org that you have requested a Third Party Payer.

E. Recertification Verification

- Once your recertification application is complete your application will be submitted to the Committee for review.
- The COPA Certification Manager will finalize your new certification, notify you, and your updated certificate will be available in your *Digital Wallet*.
- The next 2-year recertification cycle begins and professionals can immediately start accruing continuing education hours.

VII. Non-Discrimination and Appeals

A. Non-discrimination policy

The Committee provides credentialing services to any qualified individual regardless of race, color, national origin, gender, gender identification, religious preference, sexual orientation, or disability. Individuals will not be subjected to segregation or separate treatment in any manner related to receipt of credentialing services.

Each individual seeking certification is considered based on their ability to meet the standard requirements as determined by IC&RC. However, the Committee reserves the right to delay or deny a certificate to applicants based on insufficient applicant data.

All the Committee members will avoid any form of discrimination in the process of credentialing services to applicants or interested parties. If an applicant or certified Peer believes they have received unfair treatment in any way, they may file a complaint with the Executive Director.

B. Applicant Appeals

Applicants may request a formal appeal regarding eligibility for credentialing. The COPA Executive Director shall maintain documentation of all appeals for a period of at least two years.

- *Initial Review* - All applicants who wish to appeal a decision by the Committee shall first submit a written notice of appeal to the Executive Director. The notice of appeal shall contain the applicant's full legal name, contact information including mailing address, phone number, and email address, and the reason for appeal. The written notice of appeal shall be submitted to the Executive Director by email at breeah@coprovidersassociation.org.

The Executive Director shall review each written appeal within 5 business days. If the Executive Director determines that the appeal contains information likely to change the decision of the Committee, they shall submit the applicant's appeal and application to the Committee for review at a specially designated meeting, within 10 business days. In the case of a tie, the Certification Manager will act as the tie-breaker. In the case of a stalemate, the Executive Director shall have the authority to make a final decision on the appeal.

If the Executive Director determines that an appeal contains no substantially new information or is unlikely to change the determination by the Committee, the Executive Director shall notify the applicant within 10 days of the receipt of the appeal that the appeal has been denied.

- *Second Appeal* - If the applicant is not satisfied with the outcome of the Initial Review, they may appeal the decision to the Executive Committee.

To file a second appeal the applicant shall submit, in writing, the appeal to the Executive Director and the President of the Executive Committee. The appeal shall clearly indicate it is the second notice of appeal and should clearly indicate the applicant's reason for a second appeal.

The President of the Executive Committee will issue a written decision within 14 business days of the appeal. This decision will be the final decision of the agency.