



Evidence-Based Self-Management Programs

Self-Management Resource Center

CERTIFICATION GUIDELINES



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Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective August 2021

Definitions

Leader Training:

- An event during which prospective Leaders are trained by two Master Trainers or T-Trainers.

Master Training:

- An event where prospective Master Trainers are trained by two T-Trainers or a Certifying T-Trainer and 1-2 T-Trainer apprentices. To attend a Master Training, one must have successfully completed Leader training and have led two complete workshops, one of which must have been in the past year.

Cross-Training

- An event, either by webinar or in person, to prepare a Leader, Master Trainer or T-Trainer to facilitate a workshop in a program other than that in which they were originally trained. Cross trainings are only offered for people who are already trained in CDSMP or Tomando control de su salud. Only program-specific activities are covered in cross-trainings. To attend a cross-training, one must be an active Leader, Master Trainer or T-Trainer.
- **IMPORTANT:** Master Trainers and T-Trainers can only be cross-trained through a webinar offered only by SMRC *unless* an in-person cross-training is added on to their CDSMP Master Training which is facilitated by a T-Trainer.
- Master Trainers cannot be cross-trained by other Master Trainers.

Apprenticeship

- An event during which qualified Master Trainers apprentice to become T-Trainers. Apprentices conduct a master training under the supervision and mentorship of a Certifying T-Trainer.

Certificates of Completion of Training:

- For Leader training: Given by the organization offering the training. Format is at the organization's discretion.
- For Master training: Certificates of Completion of Training are given by the organization offering the training. This is not the same thing as Master Trainer Certification which is given only by SMRC. (see below)

Definitions, *continued*

Master and T-Trainer Certification

- Permission granted by the Self-Management Resource Center to individuals who have completed SMRC Master Training and have been recommended by their trainers for certification.
- Leaders are not certified by SMRC. Their status as leaders depends on the recommendation of the Master Trainers and is given by the organization that conducts the training.

Dates (mm/dd/yyyy):

- Training Date is the date of the last day of a training. This date is usually printed on the Certificate of Completion if one is given.
- Anniversary Date (mm/dd/yyyy – at 12-month intervals) is the date at 12-month intervals from the training date. Activity within each 12-month period is necessary to remain active.

Active Status:

- An “active” Leader or Trainer has successfully completed training, facilitated a workshop or Leader training within the initial 12 months after training and continues to facilitate all activities required by policy outlined in this document in all subsequent years. Active status is retained separately for each program in which someone has been trained.
- To become an active Leader, one must facilitate a workshop within one year of their training date.
- To become an active Master Trainer, one must:
 1. Facilitate a Leader training within one year of their training date.
 2. Be on the SMRC list serve
 3. Submit their certification application to SMRC in the website Member Portal. “Login” is found on the top menu on the home page: <http://www.selfmanagementresource.com>
- To become an active T-Trainer, one must:
 1. Make sure the Certifying T-Trainer informs SMRC of the successful completion of an apprenticeship.

Definitions, *continued*

2. Submit their T-Trainer Agreement and Certification Form to SMRC. To submit the certification form, send a pdf of the completed form to certification@selfmanagementresource.com. The forms are fillable and downloadable at <https://www.selfmanagementresource.com/resources/forms-downloads-links/>.

How to Become a Master or T-Trainer in More than One Program

Master Trainers:

- Once trained and certified as a Master Trainer in one program, status can be upgraded to Master Trainer for all programs for which the person is currently an active Leader. See page 12.
- When a Master Trainer is trained in any new program and facilitates one (1) workshop as a Leader, they can be certified as a Master Trainer in that program.
- SMRC will upgrade status to Master Trainer only after receiving the Master Trainer Agreement and Certification application for each new program from the Trainer. The link to submit the certification application is found on the SMRC website Member Portal. “Login” is found on the top menu on the home page: <http://www.selfmanagementresource.com>

T-Trainers:

- Once certified as a T-Trainer in one program, status will be upgraded to T-Trainer for all programs for which the person is currently an active Master Trainer or Leader. See page 14.
- When a certified T-Trainer is trained as a Master Trainer or a Leader in any new program and facilitates one (1) workshop in that new program as a Leader, they can be upgraded to a T-Trainer in that program.
- SMRC will upgrade status to T-Trainer only after receiving the *T-Trainer Agreement and Certification Form for Additional Program* for each new program from the T-Trainer. To submit the certification form, send a pdf of the completed form to certification@selfmanagementresource.com. The forms are fillable and downloadable at <https://www.selfmanagementresource.com/resources/forms-downloads-links/>

Leader Requirements – In-Person Training

<p>Part I: LEADER TRAINING IN-PERSON</p>	<p>Potential Leaders must attend an in-person 4-day Leader training (24 hours) and successfully complete 2 practice teaches during training. Approval is determined by the Master Trainers according to specified criteria.</p>
<p>Part II: AFTER TRAINING - FIRST 12 MONTHS TO BECOME ACTIVE LEADER</p>	<p>To <u>become an Active Leader</u>, Leaders must facilitate <u>at least one</u> in-person or video-platform 6-week workshop (all six 2.5-hour sessions) <u>within 12 months</u> from training date (the last day of their training). Leader must <u>request from their Program Coordinator</u> the copy of the in-person or virtual Leader’s Manual and virtual slides package to facilitate either an in-person or virtual (video-platform) workshop.</p> <p>In addition, <u>all new Leaders must have a fidelity check</u> done by agency’s Program Coordinator or Master Trainer for their first workshop.</p> <p>NOTE: Facilitating the 6-weeks of conference calls with participants using the mailed Tool Kit <u>will NOT count</u> toward completing certification requirement to <u>become an Active Leader</u>.</p>
<p>Part III: RETENTION OF ACTIVE STATUS – PREFERRED OPTION AFTER FIRST 12 MONTHS</p>	<p>To <u>remain an Active Leader</u>, Leaders must facilitate <u>at least one</u> in-person or video-platform 6-week workshop (all six 2.5-hour sessions) <u>every 12 months</u>, using the last day of their training as Anniversary Date.</p> <p>NOTE: Facilitating the 6-weeks of conference calls with participants using the mailed Tool Kit <u>will count</u> toward completing certification requirement to <u>remain an Active Leader</u>.</p>
<p>Part IV: RETENTION OF ACTIVE STATUS – ADDITIONAL OPTION</p>	<p>If an <u>active Leader</u> is unable to facilitate an in-person or virtual (video platform) workshop within a given 12 months, they may <u>attend a Refresher Training</u>, either in-person locally or online through SMRC, to remain active. Refreshers may not be used during the first 12 months after completing training, nor can a refresher be used 2 years in a row.</p> <p>Inactive Leaders must repeat a 4-day in-person Leader training or 7-week virtual training.</p>
<p>OBTAINING AND RETAINING ACTIVE STATUS FOR ADDITIONAL PROGRAMS</p> <p>NOTE: Workshop can be delivered in-person or video-platform for options 1-3, and may be offered by telephone/Tool Kit for options 2-3.</p>	<p>To remain active as a Leader for multiple self-management programs, the following policy applies:</p> <ol style="list-style-type: none"> 1. After training or cross-training in a new program, must facilitate <u>at least one</u> 6-week workshop (all six 2.5-hour sessions) of that program <u>within 12 months</u> from training date. 2. Every 12 months must facilitate <u>all six sessions of one 6-week community workshop</u>. 3. Every 2 years must conduct <u>all 6 sessions of one 6-week workshop</u> for <u>every program</u> for which they are active.

Leader Requirements – Virtual Training

<p>Part I: LEADER TRAINING VIRTUAL (VIDEO-PLATFORM)</p>	<p>Potential Leaders must:</p> <ol style="list-style-type: none"> 1. Participate in <u>all sessions of the 7-week video-platform training</u>. Week 1 will be one session and weeks 2-7 will be 2 sessions on 2 different days per week. Each session will be <u>2 to 2.5 hours</u>. Trainees must have and know how to use reliable internet connection, computer, speakers, and webcams. 2. Trainees must successfully complete 2 practice teaches during training. Success is determined by the Master Trainers according to specified criteria. 3. After successfully completing the training, Leaders must complete one virtual (video-platform) workshop to <u>become an Active Leader</u>. <p>NOTE: Facilitating the 6-weeks of conference calls with participants using the mailed Tool Kit will NOT count toward completing certification requirement to <u>become an Active Leader</u>.</p>
<p>Part II: MOVING FROM VIRTUAL LEADER TO IN-PERSON LEADER</p>	<p>No additional training is required. Leader will request the copy of the in-person <i>Leader's Manual</i> to facilitate in-person workshop from the Program Coordinator.</p> <p>Then the Leader <u>must, if possible, facilitate the first in-person workshop with another Leader who has facilitated at least one in-person workshop</u>. It is best if this person was trained and certified through an in-person training.</p> <p>In addition, the Leader <u>must have a fidelity check</u> done by agency's Program Coordinator or Master Trainer.</p>
<p>Part III: RETENTION OF ACTIVE STATUS – PREFERRED OPTION</p>	<p>To <u>remain an Active Leader</u>, Leaders must facilitate <u>at least one</u> virtual, in-person or Tool Kit with conference call (if applicable) 6-week workshop (all six sessions) <u>every calendar year</u> .</p>

Leader Requirements – Virtual Training, *continued*

<p>Part IV: RETENTION OF ACTIVE STATUS – ADDITIONAL OPTION</p>	<p>If an <u>active</u> Leader is unable to facilitate a virtual, in-person or Tool Kit with conference call workshop within a calendar year, they may <u>attend a Refresher Training</u>, either in-person locally or online through SMRC, to remain active. Refreshers may not be used during the first 12 months after completing training, nor can a refresher be used 2 years in a row.</p> <p><u>Inactive Leaders must repeat a 4-day Leader training</u>, either in-person or virtual.</p>
<p>OBTAINING AND RETAINING ACTIVE STATUS FOR ADDITIONAL PROGRAMS</p> <p>NOTE: Workshop can be delivered virtually or in-person.</p>	<p>To remain active as a Leader for multiple self-management programs, the following policy applies:</p> <ol style="list-style-type: none"> 1. After training or cross-training in a new program, must facilitate <u>at least one 6-week workshop</u> (all six 2.5-hour sessions) of that program <u>within 12 months</u> from training date. 2. Every calendar year must facilitate <u>all six sessions of one 6-week community workshop</u>.* 3. Every 2 years must conduct <u>all sessions of one 6-week workshop</u> for <u>every program</u> for which they are active.* <p>*These can be offered virtually, in person or by telephone/tool kit</p>

Leader Requirements – Telephone/Tool It Training ONLY

<p>Part I: LEADER TRAINING TELEPHONE/TOOL KIT ONLY</p>	<p>Potential Leaders must:</p> <ol style="list-style-type: none"> 1. Participate in <u>all days or sessions</u> of either an in-person or virtual leader training. 2. Trainees must successfully complete 2 practice teaches during training. Approval is determined by the Master Trainers according to specified criteria. 3. After successfully completing the training, Leaders must facilitate the 6-week telephone workshop with participants using the mailed Tool Kit within 12 months to <u>become an Active Leader</u> for the telephone program only.
<p>Part II: RETENTION OF ACTIVE STATUS</p>	<p>If an <u>active</u> telephone-only Leader is unable to facilitate the 6-week telephone workshop within a calendar year, they may <u>attend a Refresher Training</u>, either in-person locally or online through SMRC, to remain active. Refreshers may not be used during the first 12 months after completing training, nor can a refresher be used 2 years in a row.</p> <p><u>Inactive Leaders must repeat the full Leader training</u>, either in-person or virtually.</p>
<p>OBTAINING AND RETAINING ACTIVE STATUS FOR ADDITIONAL PROGRAMS</p> <p>NOTE: Workshop can be delivered virtually or in-person.</p>	<p>To remain active as a Telephone Leader for multiple self-management programs, the following applies:</p> <ol style="list-style-type: none"> 1. After training or cross-training in a new program, must facilitate <u>at least one</u> 6-week telephone workshop of that program <u>within 12 months</u> from training date. 2. Every calendar year must facilitate <u>all six sessions of one 6-week telephone workshop</u>. 3. Every 2 years must conduct <u>all sessions of one 6-week telephone workshop</u> for <u>every program</u> for which they are active.

**Master Training Requirements – Beginning January 1, 2022
(for any trainings before that date, contact SMRC)**

<p>Part I: BEFORE AND DURING MASTER TRAINING</p>	<p>Potential Master Trainers must:</p> <ol style="list-style-type: none"> 1. Successfully complete Leader Training (in any SMRC program). 2. Facilitate at least 2 workshops (in any program). One of these workshops must take place within 12 months before the date of Master Training. 3. If possible, schedule a Leader training to be offered soon after completing Master Training (preferably within 6 months after training, but definitely within 12 months after the last day of the training date). 4. Attend either a 3-session online or a two-day in-person Master Training (see training calendar for trainings offered by SMRC). 5. Be recommended for Master Training Certification by the T-Trainer conducting the training. 6. Submit their Master Trainer Certification application online on SMRC’s website Member Portal. “Login” is found on the top menu on the home page: https://www.selfmanagementresource.com/ 7. Subscribe to and remain on the Trainer list serve.
<p>Part II: AFTER TRAINING – FIRST 12 MONTHS OBTAINING CERTIFICATION</p> <p>Only for MT trained in person prior to Jan 1, 2022</p>	<p>To <u>become certified as a Master Trainer</u>, Master Trainers must:</p> <ol style="list-style-type: none"> 1. Facilitate one Leader training within 12 months. 2. Once certified as a Master Trainer in one program, SMRC will give Master Trainer certification in all programs for which they are <u>currently active as Leaders</u> after submitting an application or certification online for each program. To submit the application log in to SMRC’s Member Portal. “Login” is found on the top menu on the home page: https://www.selfmanagementresource.com/ <p>NOTE: An extension may be granted depending on certain and extenuating circumstances.</p>

Master Trainer Requirements, *continued*

<p>Part III: MOVING FROM IN-PERSON MT TO VIRTUAL MT</p>	<p>Existing Master Trainer (trained in-person) must:</p> <ol style="list-style-type: none"> 1. Facilitate <u>one virtual (video-platform) 6-week workshop</u> (all six 2.5-hour sessions) during which they keep weekly notes of problems and concerns. 2. Attend the <u>SMRC’s virtual certification session</u> of approximately 3 hours. There will be a fee charged. Dates to be posted on SMRC’s Website - Training Calendar. 3. Facilitate <u>one video-platform Leader training within 12 months</u> of SMRC’s certification session.
<p>Part IV: RETENTION OF CERTIFICATION</p>	<p>To <u>remain active as a Master Trainer</u>, the following policy applies <u>after the initial 12 months</u>:</p> <ol style="list-style-type: none"> 1. Must facilitate the <u>first full in-person (4-days) or virtual (7-weeks) Leader training no later than 18 months</u> from training date. 2. <u>Every 12 months</u>, must facilitate <u>one</u> of the following to remain certified: <ul style="list-style-type: none"> • One 6-session community in-person or virtual workshop, or • One full in-person or virtual Leader training, or • One in-person or virtual Leader cross-training, or • One in-person or virtual Leader Update training, if relevant. 3. <u>Every 3 years</u> conduct <u>one</u> of the above for <u>every program</u> for which they are certified. 4. <u>Every 3 years</u> conduct a <u>full in-person or virtual Leader training</u>. 5. <u>Every year</u> complete and <u>submit</u> a <u>Trainer’s Annual Report (due by January 30 every year)</u>. The link “Submit Report” is available through your SMRC portal login link on the homepage of our website. 6. Remain <u>subscribed to the Trainers list serve</u>.

Master Trainer Requirements, continued

<p>Part V: LOSS OF CERTIFICATION</p> <p>NOTE: Workshop and Leader Training can be delivered as in-person or virtual (video-platform)</p>	<p>If a Master Trainer:</p> <ol style="list-style-type: none"> 1. Does not facilitate their first Leader training within 18 months from training date, or 2. Does not facilitate workshops or conduct Leader cross-trainings or Leader update training (if relevant) for any 12-month period, or 3. Does not conduct a full Leader training every three years, or 4. Does not submit an Annual Report. <p>They will be considered inactive as a Master Trainer and must be re-trained and re-certified as a Master Trainer.</p>
<p>OBTAINING AND RETAINING CERTIFICATION FOR ADDITIONAL PROGRAMS</p> <p>NOTE: Workshop and Leader Training can be delivered as in-person or virtually</p>	<p>Active Master Trainers can become Master Trainers in an additional program. They must complete the following three steps:</p> <ol style="list-style-type: none"> 1. Complete <u>cross-training in a SMRC webinar</u> or as part of their <u>initial Master Training</u>, and 2. Facilitate one 6-week workshop (all 6 sessions) within 12 months of training date, and 3. Submit their Master Trainer Agreement and Certification application within one month from completion of certification requirements. To submit the certification application, log in to the Member Portal on the SMRC Website’s home page. “Login” is found on the top menu on the home page: https://www.selfmanagementresource.com <p>To remain a certified Master Trainer in multiple programs, they must complete Program trainings and workshops as detailed in Part III above.</p>

T-Trainer Requirements

<p>Part I: APPRENTICESHIP</p>	<p>To become a T-Trainer, Master Trainers</p> <ol style="list-style-type: none"> 1. Must complete a supervised apprenticeship. 2. Must be active and have conducted at least 3 Leader Trainings within the past 2 years one of which was in the past year. A link for the application can be found under “Forms, Downloads & Links” under “Resources” on the main menu of our website. 3. Must apprentice for a full in-person or video-platform master training under the supervision of a Certifying T-Trainer and must be signed off by the Certifying T-Trainer as being approved as a T-Trainer. In some cases, they may be asked to complete two supervised Master Trainings. <p>All trainees who have completed their apprenticeship will automatically be subscribed to the SMRC T-Trainers List Serve. T-Trainers must remain subscribed to both the T-Trainers and Trainers list serves for regular updates from SMRC.</p>
<p>Part II: OBTAINING T-TRAINER CERTIFICATION PRACTICE AND OTHER REQUIREMENTS WITHIN 12 MONTHS AFTER TRAINING</p>	<p>To become certified as a T- Trainer, T-Trainers must:</p> <ol style="list-style-type: none"> 1. Facilitate a master training during the 18-month period after completion of the apprenticeship. 2. Return the T-Trainer Agreement and Certification Application. A link for the form is under Resources “Forms, Downloads & Links” on the main menu of our website. To submit the form, send a pdf to certification@selfmanagementresource.com. 3. Once certified as a T-Trainer in one program, SMRC gives T-Trainer certification in all programs for which they are currently active as Master Trainers. <p>NOTE: An extension may be granted depending on certain and extenuating circumstances.</p>

T-Trainer Requirements, *continued*

<p>Part III: RETENTION OF CERTIFICATION</p>	<p>To remain certified, the following apply:</p> <ol style="list-style-type: none"> 1. Every 12 months after the first year after the apprenticeship, must facilitate one of the following in <u>any</u> of the programs in which one is certified: <ul style="list-style-type: none"> • One 6-session series of a community or virtual workshop, or • One 4-day in-person or 7-week virtual Leader training, or • One cross-training, or • One Leader update training, if relevant, or • One master training. 2. Every 3 years facilitate a workshop, full training, cross-training, or update training (of Leaders only) in ALL programs in which one is certified. 3. Every 3 years conduct a full master training in one of the programs. 4. Every year complete and submit a Trainer’s Annual Report (due by January 30 every year). The link “Submit Report” is available through your SMRC portal login link on the SMRC’s website. “Login” is found on the top menu on the home page: https://www.selfmanagementresource.com 5. Remain a member of the T-Trainer and Trainer list serves.
<p>Part IV: LOSS OF CERTIFICATION</p>	<p>If inactive in any program for a period of 3 years (have not facilitated community workshops, Leader trainings, cross-trainings, update trainings, or master trainings), T- Trainer options will be at the discretion of SMRC Certifying T-Trainers.</p>
<p>OBTAINING AND RETAINING CERTIFICATION FOR ADDITIONAL PROGRAMS</p>	<p>Active T-Trainers can become T-Trainers in an additional program. They must complete the following three steps:</p> <ol style="list-style-type: none"> 1. Complete cross training in a webinar or in a community training, and 2. Facilitate one 6-week workshop (all 6 sessions) within 12 months of training date, and 3. Return their <i>T-Trainer Agreement and Certification Form for Additional Program</i> within one month from completion of certification requirements. The forms are fillable and downloadable at https://www.selfmanagementresource.com/resources/forms-downloads-links/ <p>To remain a certified T-Trainer in multiple programs, they must complete Program trainings and workshops as detailed in Part III above.</p>