There are 2 main parts of the SMRC website:

1. **The public website.** This area of the website is available to anyone. The most commonly part used by the public is the Organization Locator. Certain parts of the public site are important for Program Coordinators, Licensees, and Master Trainers, such as the Training Calendar and the Resources section.

2. **The Member Portal (private).** This area is available only to Program Coordinators, Licensees, and Master Trainers. In addition, Leaders have limited access while enrolled in trainings.

After discussing the Organization Locator, we will concentrate on describing the parts of the site that Licensees, Program Coordinators, Master Trainers, and Leaders will use the most: **Resources, Training Calendar**, and the **Member Portal**.
The Public Website

Everyone who looks at the website can use all of the public features. The most common feature is the Organization Locator (figure 1) on the public site. It is easily accessible from the home page.

The Organization Locator (figure 1)

Millions of adults live with one or more chronic health conditions. How these people manage their conditions on a day to day basis greatly determines their symptoms and quality of life. Self-Management Resource Center programs help people and their caregivers manage their symptoms, improve quality of life, and reduce healthcare costs.

Anyone searching for a workshop can do so on the Organization Locator, and filter by workshop name, country, and state, or type the name of the city in the search box (figure 2, next page).
Searching in Organization Locator (figure 2)

The next page shows what the Organization Locator looks like if you search for Diabetes Self-Management and click one of the pins on the map (figure 3).
It is important that all Licensees/Program Coordinators make sure that their organization is properly referenced in the Organization Locator. To do so, log in to the **Member Portal** and update your **Personal Profile** (pages 11-13).

The two most useful public website tools for Licensees, Program Coordinators, and Master Trainers are **Resources Section** (figure 4, next page) and the **Training Calendar** (figure 5, page 7).
The Resources Section contains up-to-date information important to Program Coordinators, Master Trainers, and academics.

Guidances (first menu item on figure 4) are available for download. Many changes to how SMRC workshops are delivered have occurred since the beginning of the pandemic. The Guidances details those changes over time.

Our Bibliography (second menu item on figure 4) provides the references for scientific articles about SMRC programs. These can be especially useful for anyone applying for funding or making presentations.

Recent Manual Dates and Materials (third menu item on figure 4) should be check before every training. Make sure that your materials are the most recent before printing or distributing manuals or materials. We find that there are a lot of old Leader’s Manuals out there, so it is important to check this section to make sure that your Leaders and Trainers are using the appropriate most up-to-date manuals.

Languages and Mode of Delivery Options (fourth menu item on figure 4) lists details about which modes of delivery are available for each program, as well as the languages available.
**Forms, Downloads, Links** (fifth menu item) includes worksheets to prepare for License and Master Trainer annual reports, a sample license, and Trainer and Leader certification guidelines.

**Program Materials** (sixth menu item) lists the books, tool kits, audio and video materials available, with links to the publisher’s information and order forms.

**Webinar Recordings and Videos** (seventh menu item) - recordings of past SMRC informational webinars and videos can be viewed here.

**Skills Videos** (eighth menu item) demonstrate the facilitation skills needed to facilitate an SMRC program. You can use these to help your Leaders refresh their skills.

**Research and Evaluation Tools** (ninth menu item) includes evaluation findings and specific scales that have been used during the development and the outcomes research for SMRC programs, with article citations. We also include evaluation instruments that have been translated by others, if available. All of these scales, unless otherwise noted, are free to use without permission.

**SMRC Logos for Download** (tenth menu item). Consult your organization’s SMRC license before using an SMRC logo. They are required for promotional materials within certain parameters. (The American Diabetes Association logo is available within certain guidelines to licensed organizations offering the Diabetes Self-Management Program. For information about how to obtain the ADA logo and instructions, contact smrc@selfmanagementresource.com.)
The Training and Webinar Calendar (figure 5)

Training and Webinar Calendar

Learn about and register for upcoming SMRC trainings here.

- We offer online trainings using Zoom and in-person trainings in non-pandemic times.

Events for June 2022

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<th>SUNDAY</th>
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<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
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<td>CDSMP to Building Better Caregivers Cross-Training - June 3 2022</td>
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<td>Virtual Master Training for New Master Trainers - June 8, 15, 22, 2022</td>
<td>2022 Chronic Pain Self-Management Update - June 9 2022</td>
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The Training and Webinar Calendar (figure 5, previous page) lists all SMRC trainings that have been scheduled, in addition to occasional informational webinars (see the Resources Section for the links to recordings of past webinars). It is available to anyone who views the website.

Qualified trainees can register via the Training Calendar to take the following SMRC trainings:

**Leader training** for Chronic Disease Self-Management and Tomando control de su salud. These trainings are all virtual (via Zoom) and are 2.5-hours two days per week for seven weeks. In-Person Leader training is only offered by SMRC licensed organizations who may also conduct virtual Leader trainings themselves.

**Master training** for new Master Trainers. Only SMRC trains Master Trainers. At this time, it is only conducted virtually via Zoom. Master Trainings are three 3-hour sessions over three weeks. Master Trainer trainees must already be certified Leaders before enrolling in Master Training.

**Cross-training** for certified CDSMP or Tomando Master Trainers or Leaders is available for the English Diabetes, Spanish Diabetes, Pain, Cancer, HIV, and Caregivers programs.

**Update training** is offered for newly updated programs, when applicable. Master Trainers and Leaders may take SMRC online updates.

**Leader Refresher training** is available for Leaders who either were unable to facilitate the required annual workshop one year or just need to refresh their facilitation skills. SMRC also offers a required orientation training for Master Trainers who want to facilitate either in-person or virtual Leader Refresher training.

**How to Find and Register for a Training**

On the Training Calendar page (figure 5), scroll down to the calendar. At the top of the calendar, you can navigate to particular months to see what trainings are being offered (see figure 6, next page).
Find and Register for a Training (figure 6)

Once you find a training you are interested in, hover your cursor over the date box to find the prerequisites, dates, times, and cost. Then double-click the box to open the details about the training and the link to register.

Double click to open full details

Figure 6 is continued on the next page
2022 Chronic Pain Self-Management Update - June 9 2022

Training description

Prerequisites:

- Certified Master Trainer in CPSMP*

- Must have obtained a copy of the 2021 Living a Healthy Life with Chronic Pain 2nd edition book PRIOR to training. Attendance without the new book is not permitted.

This training will prepare certified CPSMP Trainers to facilitate the updated 2022 Chronic Pain Self-Management Program.

* Leaders who meet the above requirements will be allowed on space-available basis

Master Trainers need to log into the Member Portal to register. Leaders will need to create an account to proceed with registration, if they don’t already have an account from a previous training. See more about the Member Portal, starting on the next page.
The **Member Portal** is only available to Licensees, Program Coordinators, Master Trainers, and Leaders who have an account in the system. Accessing the Member Portal requires a username and password. Licensees and Program Coordinators have an account in the system already, if they are named on their organization’s license. If you are not named on your license and wish access, email licensing@selfmanagementresource.com. Current Master Trainers are already in the system. Potential Master Trainers are added to the system when they register for Master training. During Training, access is limited to the training site; after successfully completing training, full access is granted. Leaders are granted limited access when they register for Leader training.

Once logged in, the system will show different portals to Trainers than to Licensees/Coordinators. If they are both a Trainer and Program Coordinator, they see both portals! The first time a user logs in, they will need to create a password.

**Logging In to the Member Portal** (figure 6)

Click the “Forgot your password” link to create or set a new password. If you don’t receive an email response, check your junk mail folder or email web-support@selfmanagementresource.com.
The Organization and Trainer Locators

The first time you log in, the system will show you a pop-up screen (figure 7) asking you to provide your organization’s (if you are a Licensee/Program Coordinator) or your own (if you are a Master Trainer) address to include in either the Organization or the Trainer locator.

The **Organization Locator**, for Licensees/Program Coordinators, is a tool that is linked to the “FIND A WORKSHOP” button on the website’s public home page. What you type in the pop-up is what the public will see. It is important that the person receiving the emails and phone calls from the locator can answer questions about the program(s). The public sees this information on the Organization Locator. You can also find a link to the Organization Locator on the Member Portal menu. See page 2 for more details about the Organization Locator.

The **Trainer locator** is in the private portal only. It shows your name, email address, city/state/country, programs for which you are certified to train Leaders, and language in which your report you are fluent. This tool is for Program Coordinators and other Trainers to find a Master Trainer to help with training Leaders. See page 17 for more details about the Trainer Portal, and page 21 for the Trainer Locator.

Just enter your address in the box and the system will put you on the Locator. If the pin does not look like the correct placement, you can move it with your cursor. Always **SAVE** after entering your details! If you don’t enter your address, it will pop-up every time you log in until you do!

Locator Pop-ups (figure 7)
Your Profile (figure 8) is where to update your contact information or change your password. If you or your organization changes address, phone, email address, name, or organization affiliation, you will need to make the changes on your Profile. Please check it the first time you log in and at other times during a year to make sure that all your information is correct. (This example is missing most of the needed information.)
The **Licensee/Program Coordinator Portal** menu (figure 9) links to all the SMRC tools you might need.

**Our profile** (figure 9) is where to update your contact information. You can also change your password here or on the **Change password** link on the menu.

**Our license.** (figure 9) is where you can view your organization’s license, change it, renew it, or link to your organization’s annual report. If your organization has an **umbrella license**, all the partner organizations under your license are shown (as in figure 9), and you can edit their information, delete and add partner organizations.
Manuals for Licensees/Program Coordinators (figure 10)

Which manuals are downloadable?

As a Licensee, you can see download links for Leader’s Manuals, workshop slides and Tool Kit scripts for the programs named on your license. You will also find the Leader Refresher Manual.

Questions? Email manuals@selfmanagementresource.com.

Click the links below to download your files.

- Chronic Disease Self-Management Tool Kit + Conference Call Scripts (edited 2021)  
  (Leaders must be updated in the 2020 CDSMP before facilitating this workshop) These scripts are used by CDSMP Leaders during Tool Kit with Conference Calls workshops. This manual was edited for errors and omissions in June 2021.

- In-person Chronic Disease Self-Management Leader’s Manual (watermarked) Edited June 2021  
  [Trainers must be updated in the 2020 CDSMP before facilitating this training] The watermarked Virtual Leader’s Manual is used during virtual Leader training, cross-training, and update training in person. The unmarked manual is only provided after the person has successfully completed training. Leader’s Manuals without the watermark may only be downloaded by the person named on the organization’s SMRC licensing records. This manual was edited for errors and omissions in June 2021.

- In-person Chronic Disease Self-Management Leader’s Manual 2020 (edited 2021)

Licensees/Coordinators are the only persons who can download Leader’s manuals without the watermark, workshop slides, and Tool Kit scripts (Master Trainers have training manuals, slides, and materials). Your Manuals link will look like figure 10, above. Just click the manual you want to download and be patient, as manuals take some time to download. Check the descriptions for each file before a training, to make sure you have the most recent version.
Licensees are required to submit a report each year listing their activity. You submit that report under the License Annual report tab (figure 11, above). You can also download a PDF of past reports and edit a report if you want to correct an error. When you complete, edit, or even access your report, make sure to click “Send” each time, or it will be saved as a draft and considered incomplete. Submit your annual report promptly! There is $100 fee for late reports.

You can also download a worksheet to help you prepare your License Annual report (figure 11).

Other links on the Licensees/Program Coordinators Portal menu include a link to the Organization Locator, the Trainer Locator, and a place to request a New License, if needed.
Member Portal for Trainers (figure 12)

When you log into the Member Portal as a Master Trainer, it automatically opens to the My trainings tab (figure 12). If you are enrolled in a training, here is where you would go to log in to the training site to do your pre-training tasks and log into the webinar. You can also print certificates of completion from past trainings here by clicking the “Access Training” button.
Master Trainer Certification Form (figure 13)

When you complete the requirements for certification in a program (completed the required workshops), submit your certification application for that program under the Certification form tab (figure 13). You will need the dates of your workshop(s) facilitated and your training date (if not attended through SMRC).

Once reviewed and approved by SMRC, you can print your Certification forms any time.
As a Master Trainer, you can download Leader training, cross-training, and update training manuals, slides, handouts, and watermarked Leader manuals for all programs for which you are certified. Leader’s manuals without the watermark,
workshop slides, and Tool Kit scripts are only downloadable by the contact person named on your SMRC license record (usually Program Coordinators). Click the file name to download the document/slides. Please be patient, as it takes some time for these documents to download.

Always check the manuals tab (figure 14, previous page) before every training to make sure you have the most recent materials!

**Trainer Annual Report** (figure 15)

Submit your required **Trainer Annual Report** in January of each year for the previous year’s activity under this tab (figure 15). You can also edit those reports if you need to make corrections and download a PDF of reports from the past three years. You are encouraged to download a copy of the Trainer Annual Report worksheet to help you prepare.

Remember, there is a $100 late fee for reports submitted in February, and on March 1 you lose your certification. There will be a $150 fee to reinstate your certification for reports submitted after March 1.
The Trainer Locator (figure 16)

Certified Master Trainers for SMRC Programs

Enter the city, state or province and/or country into the box on the map or click directly on the map below to find a trainer.

You can zoom in and out using the "+" and "-" buttons on the left. To see the rest of the world, zoom out ("-") or hold down your mouse and move the map to the area you are searching.

If you are missing or your information is incorrect, update the information in your profile (accessible by clicking the menu under your initial on the upper right of your screen). Once your profile is complete it will be added automatically.

The Trainer Locator is private, that is, only accessible by Trainers and Licensees/Program Coordinators who are logged in to the Member Portal. This is where to go if a Master Trainer is needed to help with a Leader training, cross-training, update training or Leader refresher training.
Each Trainer is on this map, and their name, email address, city, state, country, programs for which they are certified and the languages in which they are fluent are displayed. Here is an example of a search for a Master Trainer in Miami, Florida, USA (figure 17).

**Example of Master Trainer Search Results for Miami, Florida (figure 17)**

Entered Florida, United States into the search box, then clicked the pin on Miami

It is important that Master Trainers keep their Profile updated (page 13). If their Profile is incomplete, so is the information displayed on the Trainer Locator!
The **Member Portal** menu (figure 18) for someone who is both a Licensee/Program Coordinator and a Trainer will show links to all the areas of the private site. Links to their organization’s license, license annual reports, and new license application are available, as well as all the same areas of the Trainer’s menu. It will open by default to the trainer’s landing page, but all other links are on the menu.

We have explained the most important areas of the website where Licensees/Program Coordinators and Master Trainers can find information, complete tasks, and download what they need. The site is growing and improving. If you have questions or suggestions, contact [web-support@selfmanagementresource.com](mailto:web-support@selfmanagementresource.com).