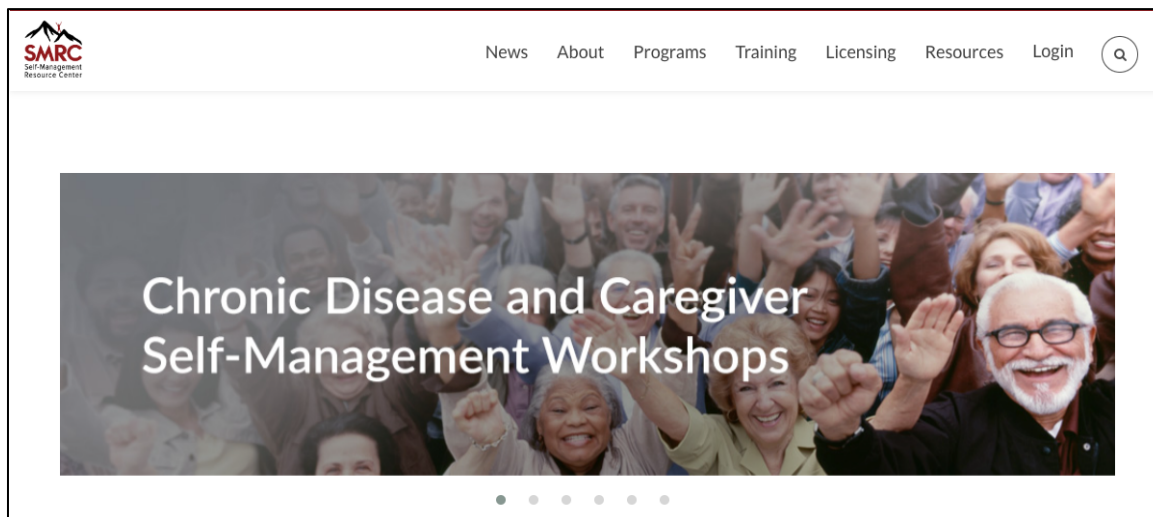


# Guide to Using the SMRC Website

<https://selfmanagementresource.com>



## 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.**

## Quick Links

### [The Public Website](#)

[The Organization Locator](#)

[Resources Section](#)

[The Training Calendar](#)

[Find & Register for Training](#)

### [The Member Portal \(Private\)](#)

[Logging In](#)

[Organization & Trainer Locators](#)

[Your Profile](#)

[Licensee/Coordinator Portal](#)

[Manuals & Materials](#)

[License Annual Report](#)

[Trainer Portal](#)

[Registered & Past Trainings](#)

[Trainer Certification Form](#)

[Manuals & Materials](#)

[Trainer Annual Report](#)

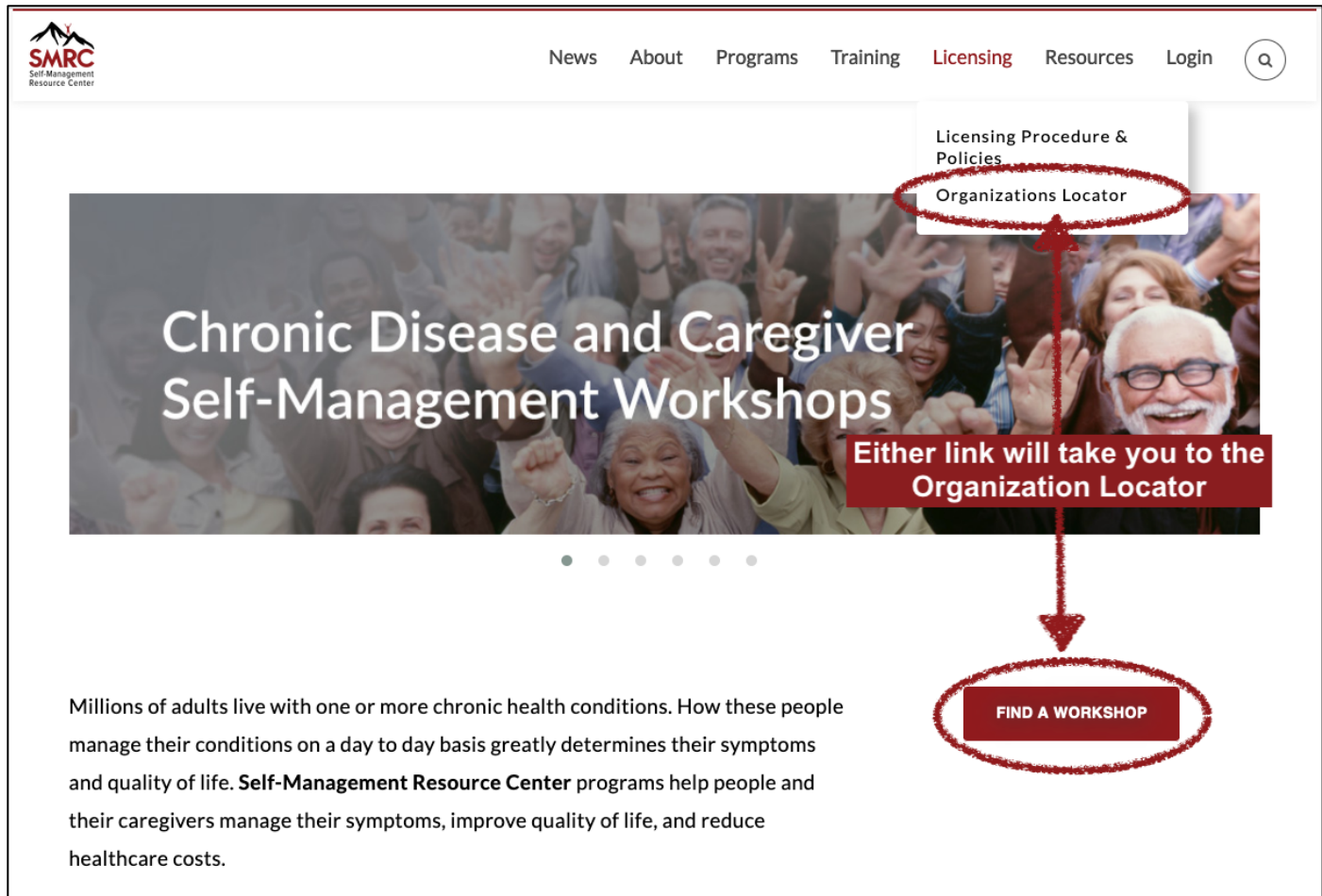
[Trainer Locator](#)

[Combo Licensee/Coordinator & Trainer 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)



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 screenshot shows the SMRC Organization Locator interface. At the top is the SMRC logo and a navigation menu with links: News, About, Programs, Training, Licensing, Resources, and Login. Below the menu is a search bar with a magnifying glass icon. The main heading reads: "SMRC's programs are offered all over the world! Find one near you!".

Below the heading are four steps for searching:

1. Select your program: A dropdown menu labeled "Select your SMRC program".
2. Select your country: A dropdown menu labeled "Select country".
3. Select State, Province or Region: A dropdown menu labeled "Select state, province or region".
4. Find it: A red button labeled "FIND NOW!".

Annotations with red arrows point to various features:

- An arrow points to the dropdown menus with the text: "You can filter by program, country and/or state".
- An arrow points to the map with the text: "Click + to zoom in to specific map area or — to zoom out to the the world".
- An arrow points to the search bar with the text: "You can search for a specific location by entering an address into the search box, or by clicking the map".
- An arrow points to the program legend with the text: "You can choose to show only one program in your results."

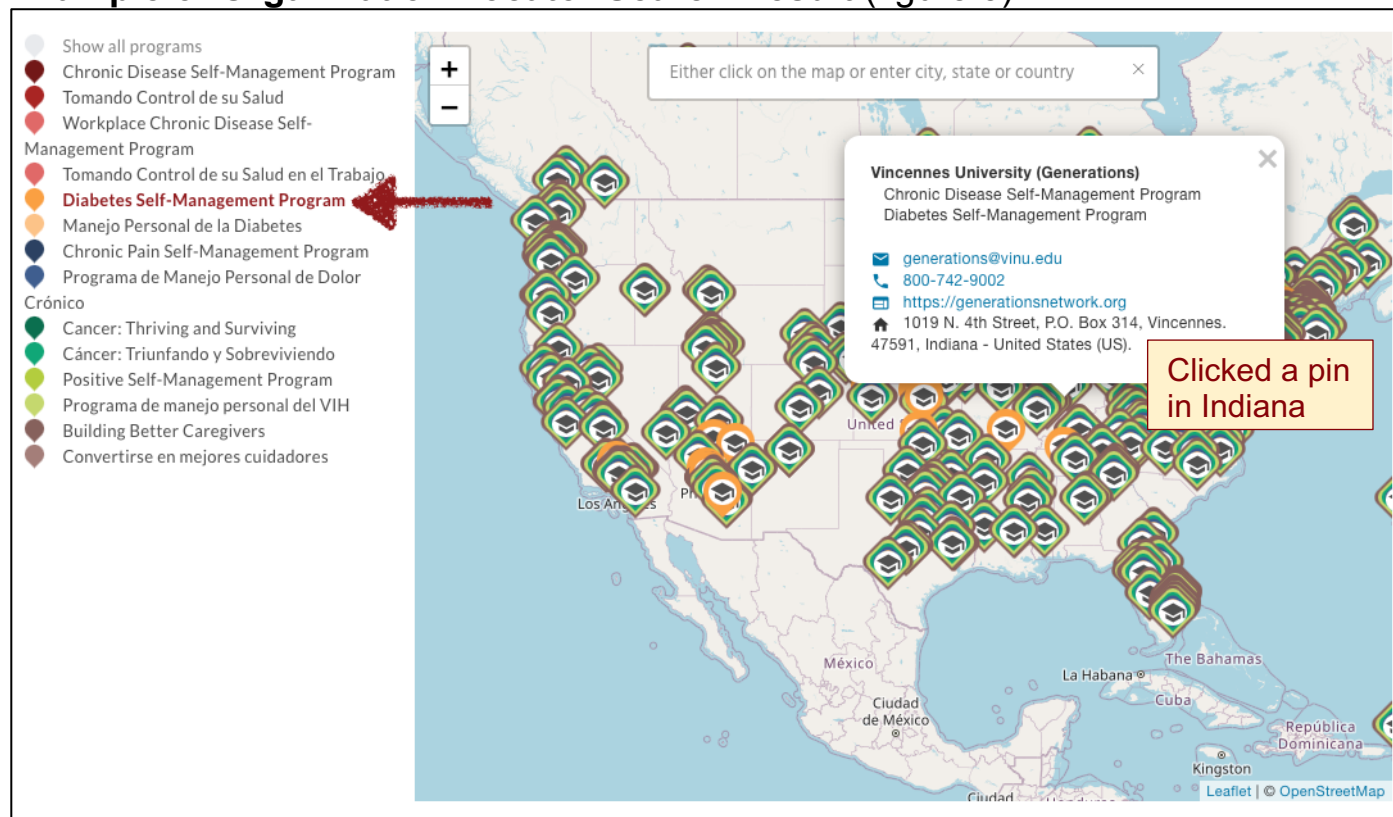
The map displays numerous colored pins representing different SMRC programs across the United States, Mexico, and the Caribbean. A legend on the left lists the programs and their corresponding colors:

- Show all programs
- Chronic Disease Self-Management Program
- Tomando Control de su Salud
- Workplace Chronic Disease Self-Management Program
- Tomando Control de su Salud en el Trabajo
- Diabetes Self-Management Program
- Manejo Personal de la Diabetes
- Chronic Pain Self-Management Program
- Programa de Manejo Personal de Dolor Crónico
- Cancer: Thriving and Surviving
- Cáncer: Triunfando y Sobreviviendo
- Positive Self-Management Program
- Programa de manejo personal del VIH
- Building Better Caregivers
- Convertirse en mejores cuidadores

The map includes a search bar with the text: "Either click on the map or enter city, state or country".

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).

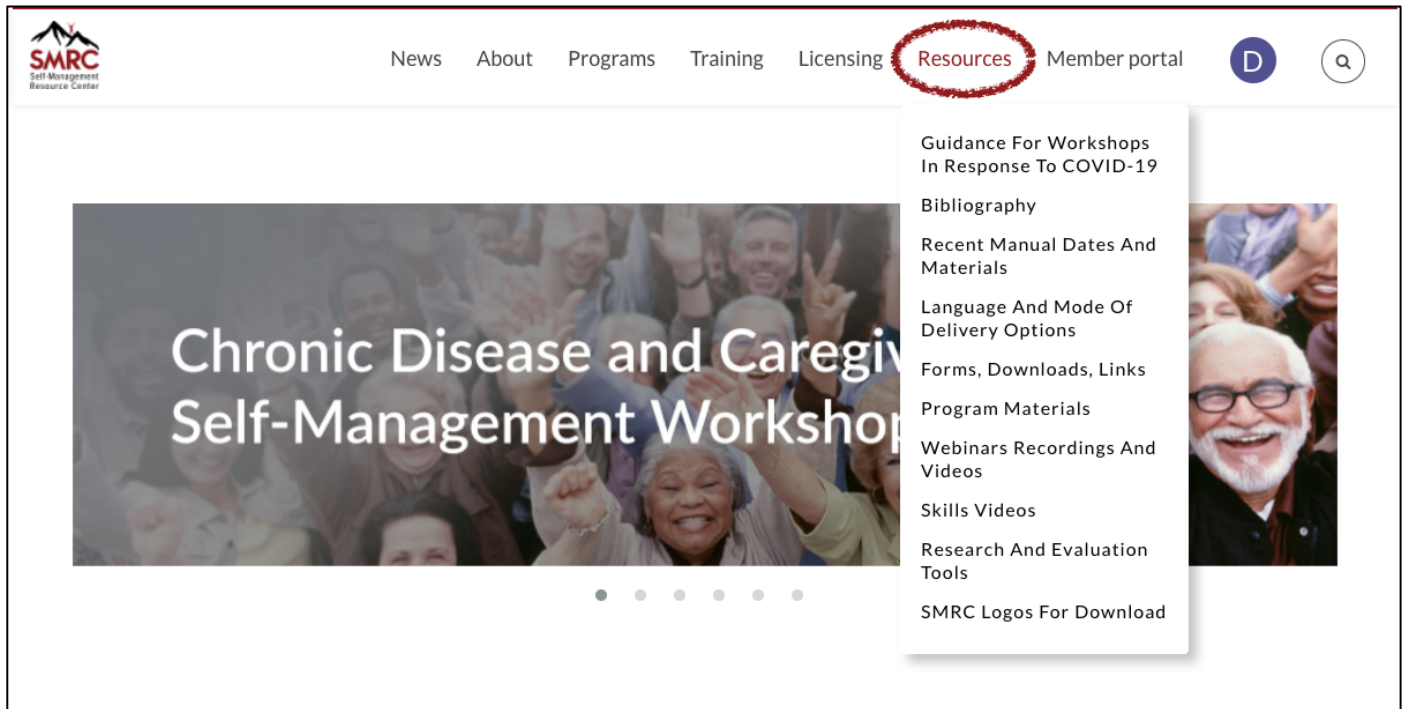
## Example of Organization Locator Search Result (figure 3)



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 (figure 4)



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.

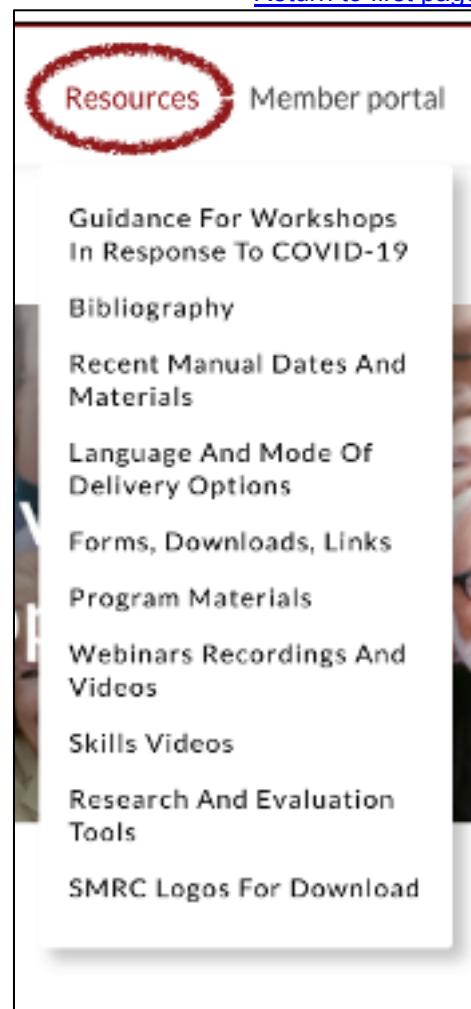
**[Program Materials](#)** (sixth menu item) lists the books, tool kits, audio and video materials available, with links to the publisher's information and order forms.

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

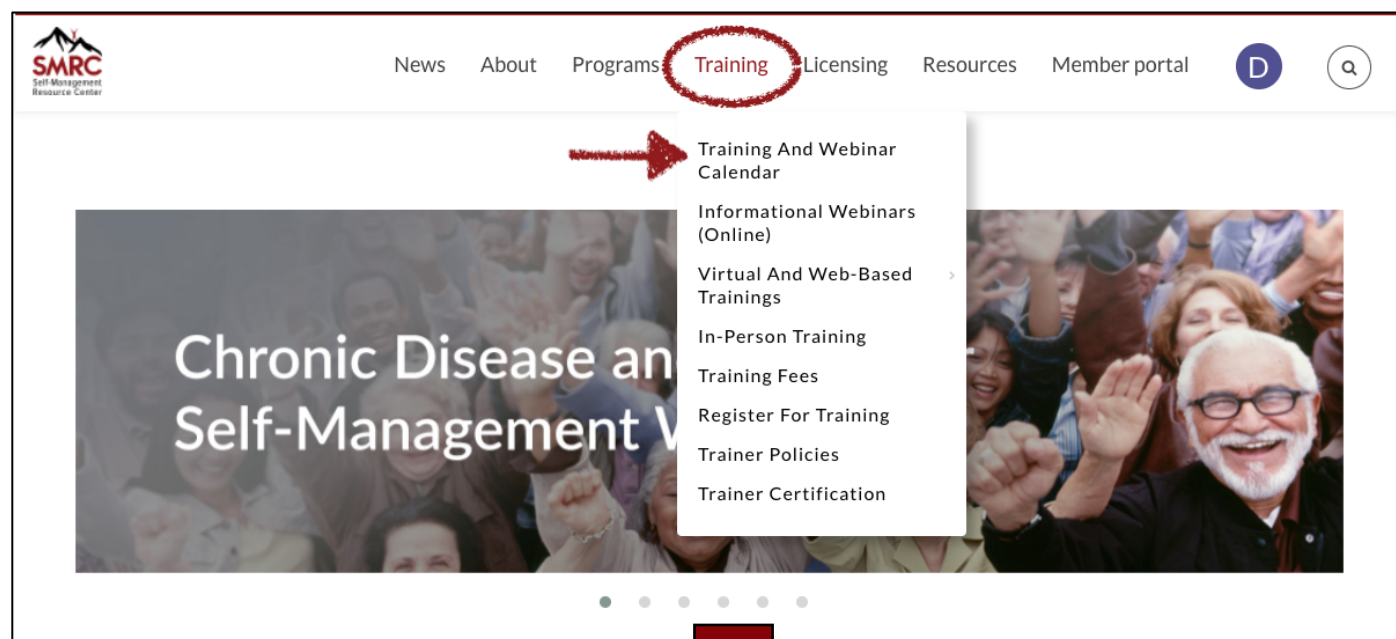
**[Skills Videos](#)** (eighth menu item) demonstrate the facilitation skills needed to facilitate an SMRC program. You can use these to help your Leaders refresh their skills.

**[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](mailto: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.



« May

Events for June 2022

July »

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29	30	31	1	2	3 CDSMP to Building Better Caregivers Cross-Training - June 3 2022	4
5	6	7	8 Virtual Master Training for New Master Trainers - June 8, 15, 22, 2022	9 2022 Chronic Pain Self-Management Update - June 9 2022	10	11
12	13	14	15	16	17	18

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)

« May
←
Events for June 2022
→
July »

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29	30	31	1	2	3	4
5	6	7	8 Virtual Master Training for New Master Trainers - June 8, 15, 22, 2022	9 2022 Chronic Pain Self-Management Update - June 9 2022	10	11
12	13	14	<div style="border: 1px solid #ccc; padding: 5px; margin: 5px;"> <p><b>2022 Chronic Pain Self-Management Update - June 9 2022</b></p> <p>📅 06/09/2022 <span style="float: right;">*Registration ends: 06/01/2022</span></p> <p>🕒 1:00 pm (Pacific) - 4:00 pm (Pacific)</p> <p>💰 200.00</p> <p>❓ Prerequisites:</p> <ul style="list-style-type: none"> <li>• Certified Master Trainer in CPSMP*</li> <li>• Must have obtained a copy of the 2021 book PRIOR to training. Attendance without the new book is not permitted.</li> </ul> <p>This training will prepare certified CPSMP Trainers to facilitate the updated 2022 Chronic Pain Self-Management Program.</p> <p><small>* Leaders who meet the above requirements will be allowed on space-available basis</small></p> </div>		17	18
19	20	21 2022 Chronic Pain Self-Management Update - June 21 2022	<div style="border: 1px solid #ccc; padding: 5px; margin: 5px;"> <p>Virtual Diabetes Self-Management Leader Training - June 24 through August 5 2022</p> </div>		24	25
26	27	28	<div style="border: 1px solid #ccc; padding: 5px; margin: 5px;"> <p>CDSMP to</p> </div>		1	2

Double click to open full details

↓

Figure 6 is continued on the next page

Figure 6, continued

## 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

#### INSTRUCTIONS:



If you are registered for this training your training page will open 2 weeks before the webinar date. You will receive instructions by email on how to access the training pre-work at that time.

#### DATE:



06/09/2022

\* Registration ends 06/01/2022

#### TIME:



1:00 pm (Pacific) - 4:00 pm (Pacific)

#### ORGANIZER:



Self-Management Resource Center

☎ (650) 242-8040

✉ [training@selfmanagementresource.com](mailto:training@selfmanagementresource.com)



#### Are you a Master Trainer?

Login the platform is required to enroll in this training, please Login.

LOGIN



#### Are you a Workshop Leader?

We allow Leaders to enroll in this training on a space-available basis. If you wish to be on the wait list, give us your contact information.

CREATE YOUR ACCOUNT

If you already have a username and password, please

LOGIN

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 (Private Website)

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](mailto: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)

SMRC Self-Management Resource Center

News About Programs Training Licensing Resources Login

# Chronic Disease and Caregiver Self-Management Workshops

Username or Email Address

Password

☐ Remember Me

LOG IN

Forgot your password?

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](mailto:web-support@selfmanagementresource.com)

# The Organization and Trainer Locators

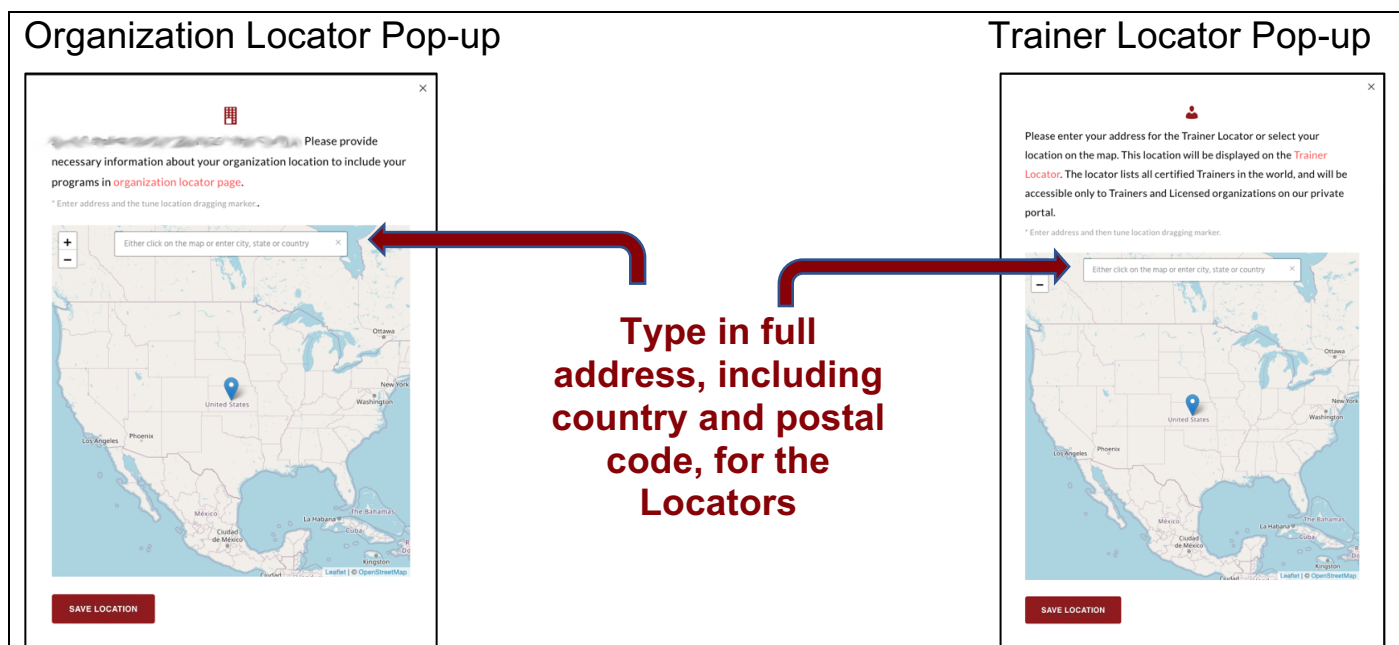
The first time you log in, the system will show you a pop-up screen (figure 7) asking you to provide your organization's (if you are a Licensee/Program Coordinator) or your own (if you are a Master Trainer) address to include in either the Organization or the Trainer locator.

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)

The screenshot shows the SMRC website header with navigation links: News, About, Programs, Training, Licensing, Resources, and Member portal. A user profile icon 'D' is circled in red, with a red arrow pointing to the 'Your Profile' option in the dropdown menu. Below the header is a banner for 'Internet Workshops' by CANARYPEERS. The main content area is titled 'Basic Information' and contains several form fields for updating user information. A large red arrow points from the 'Your Profile' menu item to the 'Basic Information' section.

**Basic Information**

First Name \*  
First Name  
Please fill out this field.

Last Name \*  
Last Name

Email address \*  
[redacted]@[redacted].s.org

Phone \*  
Phone

Alternative phone  
Alternative phone

First line of address \*  
First line of address

Second line of address  
Second line of address

City \*  
City

Postal Code \*  
Postal Code

Country \*  
Select country

State, Province or Region  
Select state, province or region

Sponsoring LICENSED organizations legal name \*  
[redacted] Search tip

Fluent languages Add one or more \*  
[redacted]

**Change Password**

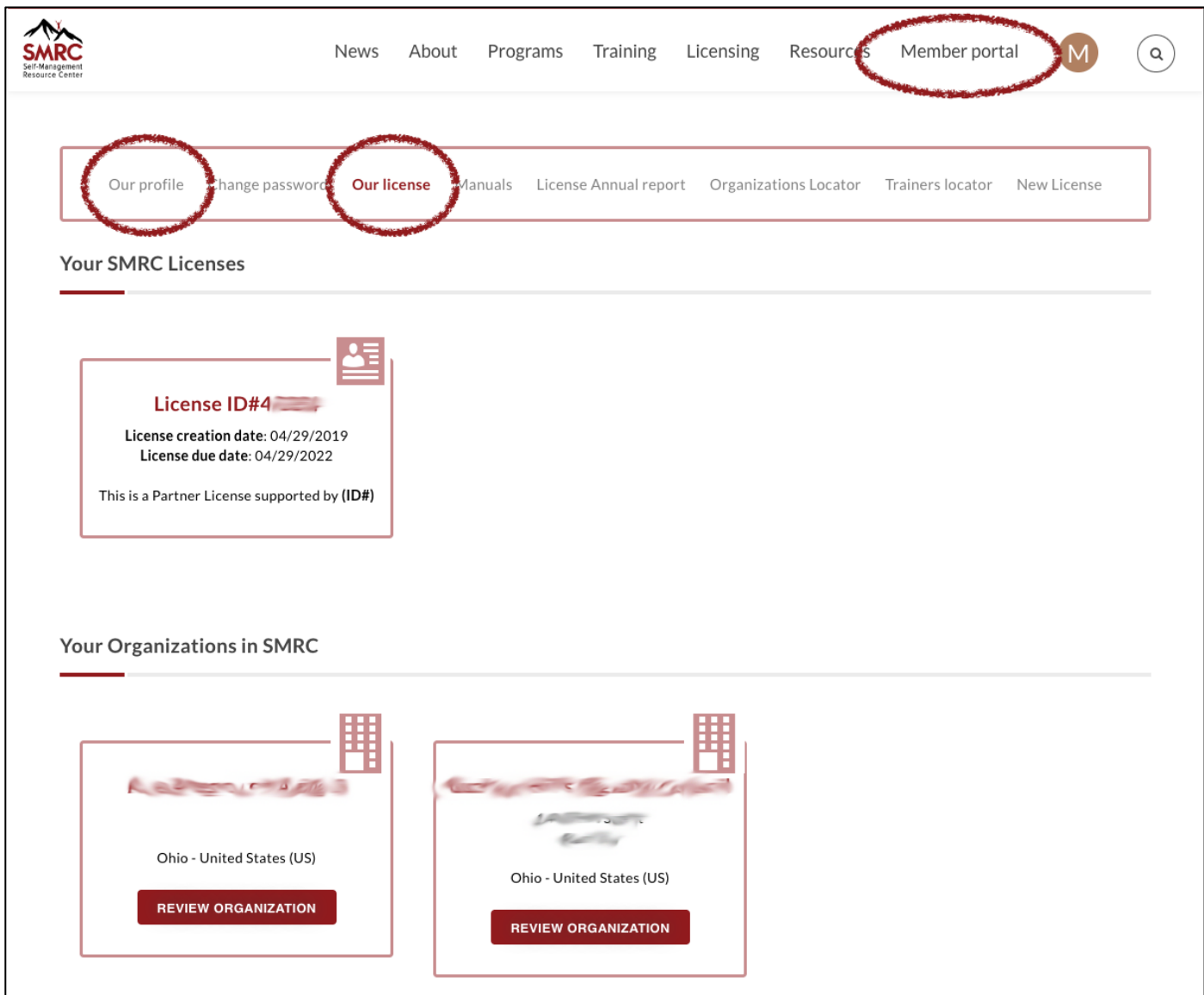
Password (leave blank to leave unchanged)  
Password (leave blank to leave unchanged)

Confirm new password  
Confirm new password

**UPDATE**

**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.)

## Member Portal for Licensee/Program Coordinator (figure 9)



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)

The screenshot shows the SMRC Self-Management Resource Center website. The top navigation bar includes links for News, About, Programs, Training, Licensing, Resources, and Member portal. The Member portal is circled in red. Below the navigation bar, a secondary menu contains links for Our profile, Change password, Our license, Manuals (circled in red), License Annual report, Organizations Locator, Trainers locator, and New License. The main content area is titled 'Which manuals are downloadable?' and provides information for licensees. It includes a list of three downloadable manuals with their descriptions and download links. A red arrow points from a yellow callout box to the first manual link.

SMRC Self-Management Resource Center

News About Programs Training Licensing Resources Member portal




Our profile Change password Our license **Manuals** License Annual report Organizations Locator Trainers locator New License

### 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](mailto: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 \(edited 2021\)](#) 

Check to make sure that you have the most recent copies before a training

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.**

## License Annual Report (figure 11)

The screenshot shows the SMRC Self-Management Resource Center website. The top navigation bar includes links for News, About, Programs, Training, Licensing, Resources, and Member portal (highlighted with a red circle). Below the navigation bar is a secondary menu with links for Our profile, Change password, Our license, Manuals, License Annual report (highlighted with a red circle), Organizations Locator, Trainers locator, and New License. The main content area features a message: "Prepare to submit your Annual Report by reviewing the questions on this worksheet" followed by a link to "License Annual Report Questions Worksheet" with a download icon. A red arrow points from a yellow box containing the text "Download the worksheet to help with preparation" to the worksheet link. Below this is a section titled "License ID# [redacted] Reports" which displays three report cards for Year 1, Year 2, and Year 3. Each card shows the report due date (09/15/2022, 09/15/2023, and 09/15/2024 respectively) and includes buttons for "LICENSE REPORT PDF" and "EDIT LICENSE REPORT". The Year 1 card also displays the message "You have successfully sent this Annual report".

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)

The screenshot shows the SMRC Member Portal for Trainers. The top navigation bar includes links for News, About, Programs, Training, Licensing, Resources, and Member portal (circled in red). Below this is a secondary navigation bar with links for My profile, Change password, My trainings (circled in red), Certification form, Manuals, Trainer Annual Report, Organizations Locator, and Trainers locator. The main content area is titled 'Enrolled trainings'. A yellow informational box contains a question mark icon and text: 'To print or download your completion certificate for past trainings, click a training's "ACCESS TRAINING" button, then "CERTIFICATE" on the next screen.' Below this, a large red arrow points down to the 'ACCESS TRAINING' button of the 'CDSMP Master Training - November 18, 2016 VA' card. The list of trainings includes:

- 2022 Chronic Pain Self-Management Update - January 20 2022 (ACCESS TRAINING)
- CDSMP Master Training - November 18, 2016 VA (ACCESS TRAINING)
- CPSMP Cross Training - August 15, 2016 (ACCESS TRAINING)
- DSMP Cross Training - November 18, 2016 (ACCESS TRAINING)
- DSMP Cross Training - November 12, 2016 (ACCESS TRAINING)
- CDSMP Update Training - April 01, 2020 (ACCESS TRAINING)
- Master Trainer Certification for Virtual SMRC Workshops - January 29 2021 (ACCESS TRAINING)

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)

The screenshot displays the SMRC Member portal interface. At the top, the SMRC logo is on the left, and navigation links for News, About, Programs, Training, Licensing, Resources, and Member portal are on the right. The 'Member portal' link is circled in red. Below the navigation bar, a secondary menu contains links for My profile, Change password, My trainings, Certification form (circled in red), Manuals, Trainer Annual Report, Organizations Locator, and Trainers locator. The main content area features five program cards, each with a green checkmark icon in the top right corner. The programs are: Chronic Disease Self-Management Program, Diabetes Self-Management Program, Chronic Pain Self-Management Program, Cancer: Thriving and Surviving, and Workplace Chronic Disease Self-Management Program. Each card has a red button labeled 'PDF AGREEMENT' at the bottom. At the bottom center of the page, there is a red button labeled 'ASK FOR ANOTHER CERTIFICATION'.

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.

## Manuals for Trainers (figure 14)

**SMRC**  
Self-Management  
Resource Center

News About Programs Training Licensing Resources **Member portal** M

My profile Change password My trainings Certification form **Manuals** Trainer Annual Report Organizations Locator Trainers locator

### Which manuals are downloadable?

As a Trainer, you may download the following manuals, slides, and handouts here.

Questions? Email [manuals@selfmanagementresource.com](mailto:manuals@selfmanagementresource.com).

Click the links below to download your files.

- [Comparison of 2020 CDSMP to 2017 DSMP Cross-Training Handout](#)
- [In-person CDSMP to Diabetes Self-Management Cross-Training Manual 2021](#)
- [In-person Chronic Disease Self-Management Leader's Manual \(watermarked\) Edited June 2021](#)
- [In-person Chronic Disease Self-Management Master Trainer's Manual \(edited June 2021\)](#)
- [In-Person Diabetes Master Trainer's Manual 2021](#)
- [In-person Diabetes Self-Management Leader's Manual \(watermarked\) 2021](#)
- [In-person Leader Refresher Training Manual \(Dec 2020 rev\)](#)

**Check that you have the most recent version of documents before each training**

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)

The screenshot shows the SMRC Member portal interface. At the top, the SMRC logo is on the left, and navigation links (News, About, Programs, Training, Licensing, Resources, Member portal) are in the center. The 'Member portal' link is circled in red. Below the navigation bar, a horizontal menu contains links: My profile, Change password, My trainings, Certification form, Manuals, **Trainer Annual Report** (circled in red), Organizations Locator, and Trainers locator. Below this menu, a message states: 'Prepare to submit your Master Trainer Annual Report by filling out this worksheet first'. A link for 'Trainer Annual Report Questions Worksheet' is provided with a red arrow pointing to it from a yellow callout box that says 'Download the worksheet to help with preparation'. Below this, there are three panels for the years 2019, 2020, and 2021. The 2019 and 2020 panels show a 'Thankyou' message and a green checkmark, indicating the report has been received. The 2021 panel shows a message indicating the report is in draft and needs to be finished. Each panel has buttons for 'TRAINER REPORT PDF' and 'EDIT ANNUAL REPORT'. A note at the bottom of the 2019 panel states: '\*\* This trainer report is imported from the old platform. It hasn't the same information as the new reports starting in 2021 so your PDF report will be missing information.'

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.

## Trainer Locator (figure 16)

SMRC Self-Management Resource Center

News About Programs Training Licensing Resources **Member portal** M

My profile Change password My trainings Certification form Manuals Trainer Annual Report Organizations Locator **Trainers locator**

### 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.

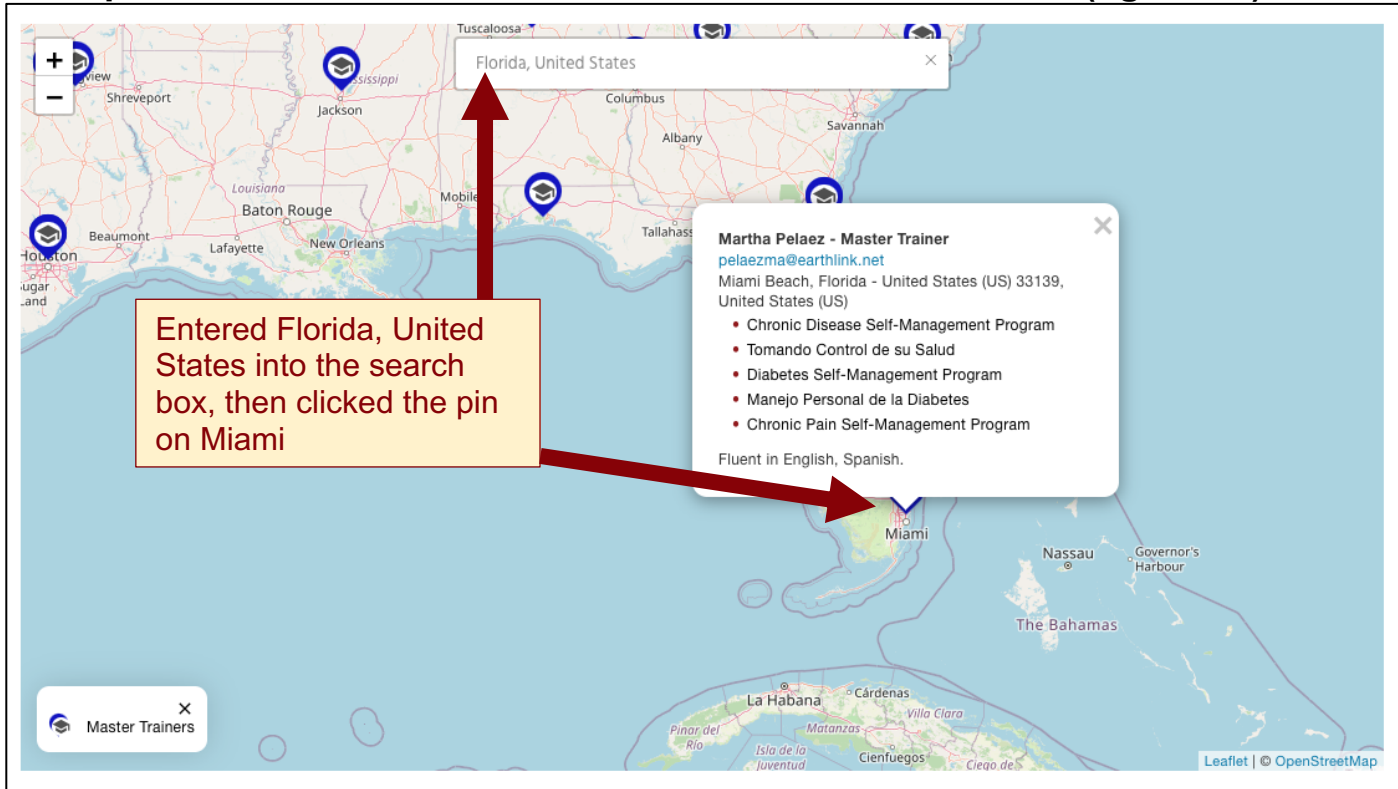
Either click on the map or enter city, state or country

Master Trainers

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.

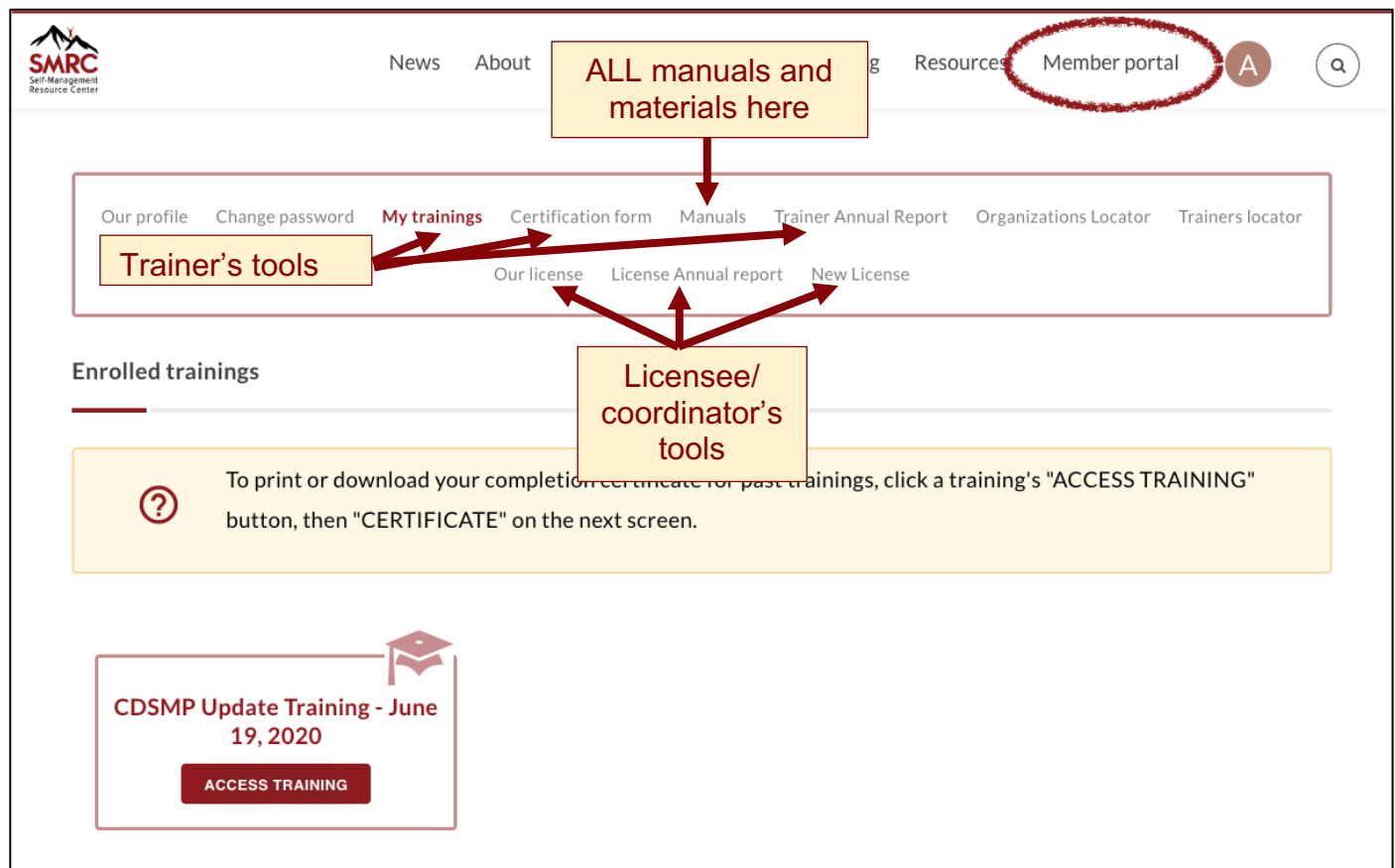
Each Trainer is on this map, and their name, email address, city, state, country, programs for which they are certified and the languages in which they are fluent are displayed. Here is an example of a search for a Master Trainer in Miami, Florida, USA (figure 17).

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



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!

## Member Portal for Someone who is Both Licensee/Program Coordinator and Master Trainer (figure 18)



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).

