



Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective January 1, 2019

Definitions

Certification:

Permission granted by the Self-Management Resource Center to individuals who have completed training in SMRC programs, have been recommended for certification for Master Trainer or T-Trainer by their trainers, and who have completed additional requirements as detailed in pages 6-10. Certified Master Trainers are allowed to train Leaders, and T-Trainers are allowed to train Leaders and Master Trainers. Leaders are not certified by SMRC, but gain and maintain active status through their organization's Leader trainings and workshop activities. Leaders facilitate community workshops for persons with chronic diseases in their community.

Active:

An "active" Leader or Trainer has successfully completed training in a program, met requirements due within the initial 12 months after training in that program, 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.

Training Date (mm/dd/yyyy):

This is the date of the last day of the leader or master training. This date is usually printed on the Certificate of Completion if one is given.

Anniversary Date (mm/dd/yyyy – at 12 month intervals):

This is the date at 12-month intervals from the training date. Activity within each 12-month period is necessary to remain active.

Leader Training:

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

Definitions continued on the next page...



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Definitions, *continued*

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.

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. For example, if you were trained in CDSMP you might be cross-trained to Diabetes or Cancer: Thriving and Surviving. Cross-trainings are conducted by Master Trainers and T-Trainers. Only program-specific activities are covered in cross-trainings.

IMPORTANT: Leaders may be cross-trained either in-person or through a webinar. Master Trainers, however, cross-train only through a webinar *unless* the in-person cross-training is added on to their CDSMP Master Training which is facilitated by a T-Trainer. Master Trainers should not be cross-trained by other Master Trainers. T-Trainers only cross-train through a webinar.

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. Master Trainer Certification is given by SMRC once the person completing Master training has facilitated two participant



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Definitions, *continued*

Certificates of Completion of Training, *continued*

workshops and has submitted their Master 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/>.

- For T-Trainers: The Certifying T-Trainer must inform SMRC of successful completion of apprenticeship and the new T-Trainer must 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/>.

POLICY ABOUT THE TRANSFERABILITY OF MASTER AND T-TRAINER STATUS

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 Part II on page 6.

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 Form for Additional Program* for each new program from the 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/>



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**POLICY ABOUT THE TRANSFERABILITY OF MASTER AND T-TRAINER STATUS,
*continued***

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 Part II on page 9.

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/>



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LEADER REQUIREMENTS	
Part I: LEADER TRAINING	Potential Leaders must attend an in-person 4-day Leader training (24 hours) and successfully complete 2 practice teaches during training. Success is determined by the Master Trainers according to specified criteria. An Active Leader is someone who successfully completes Leader training.
Part II: AFTER TRAINING - FIRST 12 MONTHS	To remain an Active Leader, Leaders must facilitate at least one 6-week workshop (all six 2.5-hour sessions) within 12 months from training date (the last day of their training).
Part III: RETENTION OF ACTIVE STATUS - PREFERRED OPTION	To remain an Active Leader, Leaders must facilitate at least one 6-week workshop (all six 2.5 hour sessions) every 12 months, using the last day of their training as Anniversary Date.
Part IV: RETENTION OF ACTIVE STATUS - ADDITIONAL OPTION	<p>If a Leader is unable to facilitate a workshop within a given 12 months, they may attend a Refresher Training, 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 Leader training.</p>
OBTAINING AND RETAINING ACTIVE STATUS FOR ADDITIONAL PROGRAMS	<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 at least one 6-week workshop (all six 2.5-hour sessions) of that program within 12 months from training date. 2. Every 12 months, must facilitate all six sessions of one 6-week community workshop. 3. Every 2 years, must conduct all sessions of one 6-week workshop for <u>every</u> program for which they are active.



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MASTER TRAINER REQUIREMENTS

<p>Part I: MASTER TRAINING</p>	<p>Potential Master Trainers must:</p> <ol style="list-style-type: none"> 1. Attend an in-person 4.5-day master training (29 hours) and successfully complete 2 practice teaches during training. Success is determined by the T-Trainers according to specified criteria. 2. Master Trainer is considered “In progress” towards Master Trainer certification for a period of up to 12 months from the last day of training. 3. All trainees who have completed training will automatically be subscribed to the SMRC Trainers List Serve. Master Trainers must remain subscribed to receive regular updates from SMRC. 4. A trained Master Trainer must request certification as a Master Trainer prior to training program Leaders. See requirements for Master Trainer certification in Part II. <p>No extensions will be granted.</p>
<p>Part II: AFTER TRAINING – FIRST 12 MONTHS OBTAINING CERTIFICATION</p>	<p>To become certified as a Master Trainer, Master Trainers must:</p> <ol style="list-style-type: none"> 1. Facilitate two (2) participant workshops within 12 months before or after master training. Both workshops must be conducted in the same program for new Master Trainers. Workshops conducted as Leaders in the previous 12 months can count towards Master Trainer certification. 2. Return their <i>Master Trainer Agreement and Certification Form for New Master Trainer</i> after completing their participant workshops. The form must be submitted within one month from completion of certification requirements. A link for the form is under “Forms, Downloads & Links” on the main menu of our website. To submit the form, send a pdf to certification@selfmanagementresource.com. The forms are fillable and downloadable at https://www.selfmanagementresource.com/resources/forms-downloads-links/ 3. Once certified as a Master Trainer in one program, SMRC gives Master Trainer certification in all programs for which they are currently active as Leaders. <p>No extensions will be granted.</p>

Master Trainer Requirements continue on the next page...



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MASTER TRAINER REQUIREMENTS, continued

<p>Part III: RETENTION OF CERTIFICATION</p>	<p>To remain active as a Master Trainer, the following policy applies after the initial 12 months:</p> <ol style="list-style-type: none"> 1. Must facilitate the first 4-day Leader training (all 4 days) no later than 18 months from training date. 2. Every 12 months, must facilitate one of the following to remain certified: <ul style="list-style-type: none"> • One 6-session community workshop, or • One 4-day Leader training, or • One Leader cross-training, or • One Leader Update training, if relevant. 2. Every 3 years, conduct one of the above for <u>every</u> program for which they are certified. 3. Every 3 years, conduct a full 4-day Leader training. 4. Every year complete and submit a Trainer’s Annual Report. The link “Submit Report” is available through your SMRC portal login link on the homepage of our website. 5. Remain subscribed to the Trainers list serve. <p>No extensions will be granted.</p>
<p>Part IV: LOSS OF CERTIFICATION</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>

Master Trainer Requirements continue on the next page...



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MASTER TRAINER REQUIREMENTS, continued

OBTAINING AND RETAINING CERTIFICATION FOR ADDITIONAL PROGRAMS

Active Master Trainers can become Master Trainers in an additional program. They must complete the following three steps:

1. Complete cross-training in a webinar or as part of their initial Master Training, and
2. Facilitate one 6-week workshop (all 6 sessions) within 12 months of training date, and

Return their *Master Trainer Agreement and Certification Form for Additional Program* within one month from completion of certification requirements. A link for the form is under “Forms, Downloads & Links” on the main menu of our website. To submit the form, send a pdf to certification@selfmanagementresource.com. The forms are fillable and downloadable at <https://www.selfmanagementresource.com/resources/forms-downloads-links/>

To remain a certified Master Trainer in multiple programs, they must complete Program trainings and workshops as detailed in Part III above.



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T-TRAINER REQUIREMENTS	
<p>Part I: APPRENTICESHIP</p>	<p>To become a T-Trainer, Master Trainers</p> <ol style="list-style-type: none"> 1. Need to complete a supervised apprenticeship. To qualify for apprenticeship, Master Trainers must be active and have conducted at least 3 Leader Trainings within the past 2 years. A link for the application can be found under “Forms, Downloads & Links” under “Resources” on the main menu of our website. 2. They must apprentice for a full 4.5-day master training under the supervision of a Certifying T-Trainer and must be signed off by the Certifying T-Trainer as being a T-Trainer. <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 18month period after completion of the apprenticeship. 2. Return the <i>T-Trainer Agreement and Certification Form for New T-Trainer</i>. A link for the form is under “Forms, Downloads & Links” on the main menu of our website. To submit the form, send a pdf to certification@selfmanagementresource.com. The forms are fillable and downloadable at https://www.selfmanagementresource.com/resources/forms-downloads-links/ 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>No extensions will be granted.</p>

T-Trainer Requirements continue on the next page...



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T-TRAINER REQUIREMENTS, <i>continued</i>	
Part III: RETENTION OF CERTIFICATION	<p>To remain certified, the following 3 policies 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: <ol style="list-style-type: none"> a. One 6-session series of a community workshop, or b. One 4-day Leader training, or c. One cross-training, or d. One Leader update training, if relevant, or e. 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. 6. Every year complete and submit a Trainer’s Annual Report. The link “Submit Report” is available through your SMRC portal login link on the homepage of our website. 4. Remain a member of the T-Trainer and Trainer list serves. <p>No extensions will be granted.</p>
Part IV: LOSS OF CERTIFICATION	<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>
OBTAINING AND RETAINING CERTIFICATION FOR ADDITIONAL PROGRAMS	<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>