

# 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)** Logaina 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 <u>Organization Locator</u> (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 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** (<u>pages 11-13</u>).

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 <u>Resources Section</u> contains up-to-date information important to Program Coordinators, Master Trainers, and academics.

<u>Guidances</u> (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 **<u>Bibliography</u>** (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.

<u>Skills Videos</u> (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.

<u>SMRC Logos for Download</u> (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 <u>smrc@selfmanagementresource.com</u>.)

## 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.

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« May		Eve	nts for June 2	022		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 <u>Training and Webinar Calendar</u> (figure 5, previous page) lists all SMRC trainings that have been scheduled, in addition to occasional informational webinars (see the <u>Resources Section</u> 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 <u>Training Calendar</u> 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)

	gister for a	i anning (lige				
« May		Eve	nts for June 2	022		July »
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29	30	31	1	2	3	4

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.

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	2022 Updat 0 0 () 1: \$ 20	Chronic Pain Self- te - June 9 2022 *Registratic :00 pm (Pacific) - 4:00 pm 00.00	Management on ends: 06/01/2022 m (Pacific)	17	18
19	20	2022 Chro Pain Self- Manageme Update - J 21 2022	<ul> <li>P</li> <li>Cert</li> <li>Mus</li> <li>without</li> <li>This tra to facili</li> <li>Manage</li> </ul>	rerequisites: ified Master Trainer in ( t have obtained a copy of book PRIOR to tra t the new book is not pe ining will prepare certif tate the updated 2022 ( ement Program.	CPSMP* of the 2021 ining. Attendance rmitted. ied CPSMP Trainers Chronic Pain Self-	24 Virtual Diabetes Self- Management Leader Training - June 24 through August 5 2022	25
26	27	28	* Leade allowed	rs who meet the above r l on space-available basi	requirements will be is	1	2
		Doub	le cl	ick to open f	full details		



Figure 6 is continued on the next page

2022 Chronic I June 9 2022	Pain Self-Manageme	nt Update -	INSTRUCTIONS: ⑦
Training descriptio	n		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.
Prerequisites:			
Certified Master Traine	er in CPSMP*		06/09/2022
• Must have obtained a c	opy of the 2021 Living a Healthy Lif	fe with Chronic Pain	* Registration ends 06/01/2022
<b>2nd edition</b> book PRIO permitted.	R to training. Attendance without t	he new book is not	TIME:Image: Second symbol1:00 pm (Pacific) - 4:00 pm (Pacific)
This training will prepare Chronic Pain Self- Manag	certified CPSMP Trainers to facilita gement Program.	ate the updated 2022	ORGANIZER:
* Leaders who meet the a basis	bove requirements will be allowed	on space-available	<ul> <li>training@selfmanagementresource.com</li> </ul>
	Login the platform is required to enroll in	We allow Leaders to enroll in	this training
	this training, please Login.	on a space-available basis. If y on the wait list, give us you information.	ou wish to be ir contact
		CREATE YOUR ACCO	UNT
		If you already have a user	name and
		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 <u>licensing@selfmanagementresource.com</u>. 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)



# 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 <u>page 2</u> 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 <u>page</u> <u>17</u> for more details about the Trainer Portal, and <u>page 21</u> 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 popup every time you log in until you do!



#### Locator Pop-ups (figure 7)

## Your Profile (figure 8)

SER Mongenet Resource Center	News About	Programs	Training	Licensing	Resources	Member portal	
Internet Worksh Cocanar	O <b>DS</b> CYPEERS						Admin ToolsYour ProfileYour OrganizationsLicensee ToolsTrainer ToolsLocatorsContactManualsSign Out
Basic Information				-			
First Name *	Las	t Name *			Em	ail address *	
First Name Please fill o	ut this field.	ast Name				1@	-≓s.org
Phone *	Alte	ernative phone			Firs	st line of address *	
Phone	4	Alternative phone	2			First line of address	
Second line of address	City	1*			Pos	stal Code *	
Second line of address	0	City				Postal Code	
Country *	Sta	te, Province or Re	egion		Spo	onsoring LICENSED	• Search tip
Select country	<b>₩</b>	Select state, prov	vince or re	gion	• X		
Fluent languages Add one or more *							
Change Password							
Password (leave blank to leave unchange	ed)		Co	nfirm new pas	ssword		
Password (leave blank to leave uncha	anged)			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)

Self-Management Resource Center	News A	About Program	ns Training	Licensing	Resources	Member port	al M	٩
Our profile hange password	Ourlicen	i <b>se</b> Manuals Lie	cense Annual repo	ort Organiza	tions Locator	Trainers locator	New License	
License ID#4 License creation date: 04/29/2 License due date: 04/29/202 This is a Partner License supported Your Organizations in SMRC	2019 22 by (ID#)							
Ohio - United States (US) REVIEW ORGANIZATION		Ohio - REVIE	United States (US)					

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 <u>umbrella license</u>, 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)

Regement to conter	News About	Programs	Training	Licensing	Resour	cet Member portal A
Our profile Cha	inge password Our licenter N	Aanuals ice	ense Annual rep	ort Organiza	ations Locat	or Trainers locator New License
Which ma	nuals are dow	nload	able?			
As a Licensee, you ca your license. You wil	in see download links for Le I also find the Leader Refre	ader's Manus sher Manual	uals, worksh I.	op slides and	d Tool Kit	scripts for the programs named on
Questions? Email ma	anuals@selfmanagementres	source.com.			C y	Check to make sure that you have the most recent
Click the links below	to download your files.				С	copies before a training
<u>Chronic Disease</u>	Self-Management Tool Kit +	Conference	e Call Script	edited 202	21) 🖸	
[Leaders must be up	dated in the 2020 CDSMP before fac	cilitating this wo	orkshop] These	cripts are used l	by CDSMP Le	eaders during Tool Kit with Conference Calls
workshops. This mar	ual was edited for errors and omissi	ions in June 202	.1.			
In-person Chroni	c Disease Self-Management	t Leader's M	anual (wate	rmarked) Ed	ited June	2021 🖸
[Trainers must be up	dated in the 2020 CDSMP before fa	cilitating this tra	aining] The wate	ermarked Virtua	l Leader's Ma	anual is used during virtual Leader training,
cross-training, and u	pdate training in person. The unmar	ked manual is or	nly provided aft	er the person ha	s successfully	y completed training. Leader's Manuals
without the waterma	ark may only be downloaded by the p	person named or	n the organizati	on's SMRC licen	sing records.	This manual was edited for errors and
omissions in June 20	21.					
In-person Chroni	c Disease Self-Management	t Leader's M	anual 2020	(edited 2021	L) 🖸	

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)

Seif-Mangement Resource Center	News About Programs	Training Licensing	Resources	Member portal P Q
Our profile Change passwor	d Our license Manual <b>s Licens</b>	e Annual report – Organiza	tions Locator Tr	ainers locator New License
	Prepare to submit your Annual Repo	ort by reviewing the questions	on this worksheet	Download the worksheet to help with preparation
License ID#	Reports			
License ID# Compared Rep Year 1	ort License ID	Report ear 2	License	ID# Report Year 3
Report due date: 09/15/2022	C Report due dat	te: 09/15/2023 🛱	Report du	e date: 09/15/2024 📛
You have successfully sent this Annu	Jal 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)



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.

#### Member portal (۵ Training Licensing Resources SMR News About Programs My profile Change password My trainings Certification form /lanuals Trainer Annual Report Organizations Locator Trainers locator **Chronic Disease Self-Diabetes Self-Management Chronic Pain Self-Management Management Program** Program Program PDF AGREEMENT PDF AGREEMENT PDF AGREEMENT **Cancer: Thriving and Surviving** Workplace Chronic Disease Self-Management Program PDF AGREEMENT PDF AGREEMENT ASK FOR ANOTHER CERTIFICATION

## 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.

#### Manuals for Trainers (figure 14)

News About Programs Training Licensing Res	sources Member portal M (
My profile Change password My trainings Certification form <b>Manuals</b> Trainer Annual Report	Organizations Locator Trainers locator
Which manuals are downloadable?	
As a Trainer, you may download the following manuals, slides, and handouts here.	Check that you have the most recent
Questions? Email manuals@selfmanagementresource.com.	version of documents
Click the links below to download your files.	before each training
<ul> <li>In-person CDSMP to Diabetes Self-Management Workshop. Also download cross-training manual, prace</li> <li>In-person CDSMP to Diabetes Self-Management Workshop. Also download cross-training manual, prace</li> <li>In-person CDSMP to Diabetes Self-Management Cross-Training Manual 2021 2</li> <li>[Trainers must be updated in the 2020 CDSMP before facilitating this training] Master Trainers use this manual. Management Workshop in-person. Also download the practice teaching assignments and training handouts.</li> <li>In-person Chronic Disease Self-Management Leader's Manual (watermarked) Edited .</li> <li>[Trainers must be updated in the 2020 CDSMP before facilitating this training] The watermarked Virtual Leader cross-training, and update training in person. The unmarked manual is only provided after the person has succe without the watermark may only be downloaded by the person named on the organization's SMRC licensing recomissions in June 2021.</li> <li>In-person Chronic Disease Self-Management Master Trainer's Manual (edited June 2020).</li> <li>In-person Chronic Disease Self-Management Master Trainer's Manual (edited June 2020).</li> </ul>	LDSMP Leaders when atten ing both in-person and tice teaching assignments and other handouts. If to train CDSMP Leaders to the Diabetes Self- June 2021 C er's Manual is used during virtual Leader training, essfully completed training. Leader's Manuals ecords. This manual was edited for errors and D21) C s used to train new CDSMP Leaders in-person. Also in June 2021.
<ul> <li>In-Person Diabetes Master Trainer's Manual 2021 Z Master Trainer's use this manual to train Diabetes Self-Management Leaders in-person. Also download practic Training.</li> </ul>	e teaching assignments and handouts for Leader
• In-person Diabetes Self-Management Leader's Manual (watermarked) 2021 🛽 🖄	
The watermarked In-Person Chronic Pain Leader's Manual is used during in-person Leader training, cross-train	ning, and update training. The unmarked manual is
only provided after the person has successfully completed training. Leader's Manuals without the watermark r organization's SMRC licensing records. Also download workshop handouts. This manual has some changes fro required to use this manual.	nay only be downloaded by the person named on the m the previous DSMP, but update training is not
• In-person Leader Refresher Training Manual (Dec 2020 rev)	
Master Trainers use this manual to facilitate in-person Leader Refresher Skills training. See Certification Guide	elines for details on Leaders' eligibility for this
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)

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)

News About Programs Training Licensing Resources Member portal	٩
My profile Change password My trainings Certification form Manuals Trainer Annual Report Organizations Locator <b>Trainers locator</b>	>
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 you mouse and move the map to the area you are searching.	r
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)

It is important that Master Trainers keep their Profile updated (<u>page 13</u>). 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)

Our profile Change pass	News Abou	ALL manuals a materials here	nd e ainer Annual Report Orga	Member portal	locator
Trainer's tools	Our	r license License Annual report	New License		
Enrolled trainings To print of button, th	or download your com nen "CERTIFICATE" o	Licensee/ coordinator's tools ppletion certificate for past of on the next screen.	rainings, click a trainin	g's "ACCESS TRAINING	u
CDSMP Update Tra 19, 2020 ACCESS TRAIN	ining - June				

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 <u>web-</u> <u>support@selfmanagementresource.com</u>.