

## STANFORD PATIENT EDUCATION RESEARCH CENTER

# Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

---

### Definitions

**Certification:**

Permission granted by the Stanford Patient Education Research Center to individuals who have completed training in Stanford 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 5-9. Certified Master Trainers are allowed to train Leaders, and T-Trainers are allowed to train Leaders and Master Trainers. Leaders are not certified by Stanford, 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):**

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 months intervals):**

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...*

## STANFORD PATIENT EDUCATION RESEARCH CENTER

# Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

---

### 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.

#### **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 Stanford once the person completing Master training has facilitated two participant workshops and has returned their Master Trainer Agreement and Certification Form to Stanford.
- For T-Trainers: The Certifying T-Trainer must inform Stanford of successful completion of apprenticeship and the new T-Trainer must complete and return to Stanford their T-Trainer Agreement and Certification Form to Stanford. Stanford will issue the T-Trainer certification.

## STANFORD PATIENT EDUCATION RESEARCH CENTER

# Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

---

### 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 III on page 4.

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.

Stanford 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. A link for the form is under “Forms, Downloads & Links” on the main menu of our website.

#### **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 III on page 4 and 6.

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.

Stanford 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 Trainer. A link for the form is under “Forms, Downloads & Links” on the main menu of our website.

## STANFORD PATIENT EDUCATION RESEARCH CENTER

# Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

---

### LEADER REQUIREMENTS

<b>Part I: LEADER TRAINING</b>	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.
<b>Part II: AFTER TRAINING - FIRST 12 MONTHS</b>	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).
<b>Part III: RETENTION OF ACTIVE STATUS - PREFERRED OPTION</b>	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.
<b>Part IV: RETENTION OF ACTIVE STATUS - ADDITIONAL OPTION</b>	<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 Stanford, to remain active. Refreshers may not be used during the first 12 months after completing training, nor can a refresher be used for 2 years in a row.</p> <p>Inactive Leaders must repeat a 4-day Leader training.</p>

*Leader Requirements continue on the next page...*

## STANFORD PATIENT EDUCATION RESEARCH CENTER

# Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

### LEADER REQUIREMENTS, continued

#### OBTAINING AND RETAINING ACTIVE STATUS FOR ADDITIONAL PROGRAMS

To remain active as a Leader for multiple self-management programs, the following policy applies:

1. After training or cross-training in a new program, must facilitate at least one 6-week workshop (all six 2.5-hour sessions) 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 every program for which they are active.

### MASTER TRAINER REQUIREMENTS

#### Part I: MASTER TRAINING

Potential Master Trainers must:

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 Stanford Trainers List Serve. Master Trainers must remain subscribed to receive regular updates from Stanford.
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.

*Master Trainer Requirements continue on the next page...*

## STANFORD PATIENT EDUCATION RESEARCH CENTER

# Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

### MASTER TRAINER REQUIREMENTS, continued

<b>Part II: AFTER TRAINING – FIRST 12 MONTHS OBTAINING CERTIFICATION</b>	<p>To become certified as a Master Trainer, Master Trainers must:</p> <ol style="list-style-type: none"><li>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.</li><li>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 &amp; Links” on the main menu of our website.</li></ol>
<b>Part III: RETENTION OF CERTIFICATION</b>	<p>To remain active as a Master Trainer, the following policy applies <b>after the initial 12 months</b>:</p> <ol style="list-style-type: none"><li>1. Must facilitate the first 4-day Leader training (all 4 days) no later than 18 months from training date.</li><li>2. Every 12 months, must facilitate one of the following to remain certified:<ul style="list-style-type: none"><li>• One 6-session community workshop, or</li><li>• One 4-day Leader training, or</li><li>• One Leader cross-training, or</li><li>• One Leader Update training, if relevant.</li></ul></li><li>3. Every 2 years, conduct one of the above for <u>every</u> program for which they are certified.</li><li>4. Every 2 years, conduct a full 4-day Leader training.</li><li>5. Every year complete and submit a Trainer’s Annual Report. A link for the form is under “Forms, Downloads &amp; Links” on the main menu of our website.</li><li>6. Remain subscribed to the Trainers list serve.</li></ol>

*Master Trainer Requirements continue on the next page...*

## STANFORD PATIENT EDUCATION RESEARCH CENTER

### Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

---

#### MASTER TRAINER REQUIREMENTS, continued

##### Part IV: LOSS OF CERTIFICATION

If a Master Trainer:

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 (if relevant) training for any 12 month period, or
3. Does not conduct a full Leader training every two years,

They will be considered inactive as a Master Trainer and must be re-trained and re-certified as a Master Trainer.

##### 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 in a community training, and
2. Facilitate one 6-week workshop (all 6 sessions) within 12 months of training date, and
3. 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 remain a certified Master Trainer in multiple programs, they must complete Program trainings and workshops as detailed in Part III above.

## STANFORD PATIENT EDUCATION RESEARCH CENTER

# Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

### T-TRAINER REQUIREMENTS

<b>Part I: APPRENTICESHIP</b>	<p>To become a T-Trainer, Master Trainers</p> <ol style="list-style-type: none"><li>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 “Trainer Policies” under “Training” on the main menu of our website.</li><li>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.</li></ol> <p>All trainees who have completed their apprenticeship will automatically be subscribed to the Stanford T-Trainers List Serve. T-Trainers must remain subscribed to both the T-Trainers and Trainers list serves for regular updates from Stanford.</p>
<b>Part II: OBTAINING T-TRAINER CERTIFICATION -- PRACTICE AND OTHER REQUIREMENTS WITHIN 12 MONTHS AFTER TRAINING</b>	<p>To become certified as a T- Trainer, T-Trainers must:</p> <ol style="list-style-type: none"><li>1. Facilitate a master training during the 12-month period after completion of the apprenticeship.</li><li>2. Return the <i>T-Trainer Agreement and Certification Form for New T-Trainer</i>. A link for the form is under “Forms, Downloads &amp; Links” on the main menu of our website.</li><li>3. Once certified as a T-Trainer in one program, Stanford gives T-Trainer certification in all programs for which they are currently active as Master Trainers.</li></ol>

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



**STANFORD PATIENT EDUCATION RESEARCH CENTER**

**Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers  
Effective February 21, 2017**

**T-TRAINER REQUIREMENTS, *continued***

<p><b>Part III: RETENTION OF CERTIFICATION</b></p>	<p>To remain certified, the following 3 policies apply:</p> <ol style="list-style-type: none"> <li>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"> <li>a. One 6-session series of a community workshop, or</li> <li>b. One 4-day Leader training, or</li> <li>c. One cross-training, or</li> <li>d. One Leader update training, if relevant, or</li> <li>e. One master training.</li> </ol> </li> <li>2. Every 2 years, facilitate a workshop, full training, cross-training, or update training (of Leaders only) in <b>ALL</b> programs in which one is certified.</li> <li>3. Every 2 years, conduct a full master training in one of the programs.</li> <li>4. Every year complete and submit a Trainer’s Annual Report. A link for the form is under “Forms, Downloads &amp; Links” on the main menu of our website.</li> <li>5. Remain a member of the T-Trainer and Trainer list serves.</li> </ol>
<p><b>Part IV: LOSS OF CERTIFICATION</b></p>	<p>If inactive in any program for a period of 2 years (have not facilitated community workshops, Leader trainings, cross-trainings, update trainings, or master trainings), T-Trainer options will be at the discretion of Stanford Certifying T-Trainers.</p>
<p><b>OBTAINING AND RETAINING CERTIFICATION FOR ADDITIONAL PROGRAMS</b></p>	<p>Active T-Trainers can become T-Trainers in an additional program. They must complete the following three steps:</p> <ol style="list-style-type: none"> <li>1. Complete cross training in a webinar or in a community training, and</li> <li>2. Facilitate one 6-week workshop (all 6 sessions) within 12 months of training date, and</li> <li>3. Return their <i>T-Trainer Agreement and Certification Form for Additional Program</i> within one month from completion of certification requirements. A link for the form is under “Forms, Downloads &amp; Links” on the main menu of our website.</li> </ol> <p>To remain a certified T-Trainer in multiple programs, they must complete Program trainings and workshops as detailed in Part III above.</p>

**STANFORD PATIENT EDUCATION RESEARCH CENTER**  
**Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers**  
**Effective February 21, 2017**

---

**Examples: Leader Trained at Training Ending on March 15 2015**

**Anniversary Date for Leader Trained: March 15**

*(Read vertically for different scenarios; read horizontally for one scenario through time)*

<b>Year 1 March 15 2015 – March 14 2016</b>		<b>Year 2 March 15 2016 – March 14 2017</b>		<b>Year 3 March 15 2017 – March 14, 2018</b>		<b>Year 4 March 15 2018 – March 14 2019</b>	
<b>Work-shops</b>	<b>Refresher</b>	<b>Workshops</b>	<b>Refresher</b>	<b>Workshops</b>	<b>Refresher</b>	<b>Workshops</b>	<b>Refresher</b>
0 <i>lapsed*</i>	Not allowed the first year after training						
1 <i>remains active</i>		1 <i>remains active</i>	0	2 <i>remains active</i>	0	1 <i>remains active</i>	0
1 <i>remains active</i>		1 <i>remains active</i>	0	0	1 <i>remains active</i>	2 <i>remains active</i>	0
2 <i>remains active</i>		2 <i>remains active</i>	0	0	0 <i>lapsed*</i>		
1 <i>remains active</i>		0	1 <i>remains active</i>	0	<i>Not allowed 2 years in row; lapsed*</i>		

\*Must be re-trained (successfully attend a new 4-day training)

**STANFORD PATIENT EDUCATION RESEARCH CENTER**

**Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers  
Effective February 21, 2017**

**Examples: Master Trainer Trained in 3 programs: CDSMP, TOMANDO and DSMP**

**Trainings ending: March 15 2015, Sept 15 2016 and January 15 2017**

*(Read horizontally for one scenario through time)*

Year 1 March 15 2015 – March 14 2016		Year 2 March 15 2016 – March 14 2017		Year 3 March 15 2017 – March 14 2018		Year 4 March 15 2017 – March 14 2018	
Workshops	Leader trainings	Workshops	Leader trainings	Workshops	Leader trainings	Workshops	Leader trainings
2 CDSMP <i>Certified</i>		1 Tomando <i>Certified</i>	1 CDSMP first full Leader training  <i>Remains certified</i>	0 CDSMP Remains certified	1 DSMP Cross- training  <i>Remains certified</i>	0 CDSMP  <i>Loses Certification* (two years inactive)</i>	1 Tomando Full Leader training  <i>Remains Certified in Tomando (conducted full training in one of the programs every 2 years)</i>
		1 DSMP <i>Certified</i>		0 Tomando		0 Tomando	
				0 DSMP		0 DSMP <i>Remains certified</i>	

\*Must be re-trained (successfully attend a new 4-day training)

**STANFORD PATIENT EDUCATION RESEARCH CENTER**

**Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers  
Effective February 21, 2017**

**Examples: Master Trainer Trained in Only CDSMP at Training Ending on March 15, 2015**

**Anniversary Date: March 15**

*(Read vertically for different scenarios; read horizontally for one scenario through time)*

Year 1 March 15 2015 – March 14 2016		Year 2 March 15 2016 – March 14 2017		Year 3 March 15 2017 – March 14, 2018	
Workshops	4-day Leader Training	Workshops	4-day Leader Training	Work-shops	4-day Leader Training
0 <i>Not certified*</i>					
1 <i>Not certified*</i>					
2 within 12 months prior to master training <i>Certified</i>	1	1 <i>Remains certified</i>	0	2	0 <i>Loses MT certification (no Leader training within 2 years)*</i>
2 <i>Certified</i>	1	2 <i>Remains certified</i>	0	0	1 <i>Remains certified</i>

\* must be re-trained as Master Trainer (successfully attend a new 4.5-day training)

## STANFORD PATIENT EDUCATION RESEARCH CENTER

### Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers Effective February 21, 2017

**Examples: MT Trained in CDSMP at Training Ending on March 15 2015 and  
DSMP Cross-Training Ending on March 17 2015 - Anniversary Date: March 15**

*(Read vertically for different scenarios; read horizontally for one scenario through time)*

Year 1 March 15 2015 – March 14 2016		Year 2 March 15 2016 – March 14 2017		Year 3 March 15 2017 – March 14, 2018	
Workshops	4-day Leader Training	Workshops	4-day Leader Training	Workshops	4-day Leader Training
0 CDSMP 1 DSMP <i>not certified*</i>					
2 CDSMP <i>certified CDSMP</i> 0 DSMP <i>not certified DSMP*</i>	0 CDSMP	0 CDSMP	1 CDSMP September 1 2016 <i>Remains certified CDSMP</i>	0 CDSMP	0 CDSMP <i>Loses certification (must do workshop or training within each year)**</i>
Already facilitated 2 CDSMP workshops <i>Certified CDSMP</i> 1 DSMP <i>Certified DSMP</i>	0 CDSMP  0 DSMP	1 CDSMP <i>Remains certified CDSMP</i> 1 DSMP <i>Remains certified DSMP</i>	0 CDSMP <i>Remains certified CDSMP</i> 1 DSMP <i>Remains certified DSMP</i>	0 CDSMP  2 DSMP <i>Remains certified DSMP</i>	0 CDSMP <i>Loses CDSMP certification (no workshop or training within year)**</i>  0 DSMP <i>Remains certified DSMP</i>

\* must be re-trained as Master Trainer (successfully attend a new DSMP cross-training)

\*\* must be retrained as Master Trainer (successfully attend a new CDSMP 4.5-day training)

**STANFORD PATIENT EDUCATION RESEARCH CENTER**

**Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers  
Effective February 21, 2017**

---

**Examples: T-Trainer Apprenticed at Training Ending on March 15, 2015**

**Anniversary Date: March 15**

<b>If to be certified in only one program</b>	<b>If to be certified in more than one program</b>
Conduct the first master training within 12 months of apprenticeship (by March 15, 2016)	Conduct the first master training in either program within 12 months of apprenticeship (by March 15, 2016)
<p>Within every 12 months from the anniversary date (by March 15 of each year), conduct at least one of the following:</p> <ul style="list-style-type: none"> <li>• A 6-session workshop series, or</li> <li>• A 4-day Leader training, or</li> <li>• A Leader cross-training (or Leader update training if a program is being updated), or</li> <li>• A 4.5-day master training</li> </ul>	<p>Within every 12 months from the anniversary date (by March 15 of each year), conduct at least one of the following for all programs in which trained:</p> <ul style="list-style-type: none"> <li>• A 6-session workshop series, or</li> <li>• A 4-day Leader training, or</li> <li>• A Leader cross-training (or Leader update training if a program is updated), or</li> <li>• A 4.5-day master training</li> </ul>
Conduct at least one 4.5-day master training in that program not less than once every 2 years from certification date (by March 15 2017, March 15 2019, etc.)	Conduct at least one 4.5-day master training in either of the programs in which trained not less than once every 2 years from certification date (by March 15 2017, March 15 2019, etc.)

**STANFORD PATIENT EDUCATION RESEARCH CENTER**  
**Active Status Guidelines for Leaders and Certification Guidelines for Master Trainers and T-Trainers**  
**Effective February 21, 2017**

**Examples: T-Trainer Apprenticed in Only CDSMP at Training Ending on March 15 2015**

**Anniversary Date: March 15**

*(Read vertically for different scenarios; read horizontally for one scenario through time)*

Year 1 March 15 2015 – March 14 2016			Year 2 March 15 2016 – March 14 2017		
Workshops	4-day Leader Training	4.5 day Master Training	Workshops	4-day Leader Training	4.5-day Master Training
0	0	0 <i>Loses TT certification* (no master training within 12 months of apprenticeship)</i>	<i>Both TT and MT certifications were lost due to complete inactivity the previous year</i>		
1	1	0 <i>Loses TT certification* (no master training within 12 months of apprenticeship)</i>	0	2 <i>Remains certified as MT</i>	0
0	1	1 <i>Remains certified</i>	3 <i>Remains certified</i>	0	0
0	1	1 <i>Remains certified</i>	1	3 <i>Remains certified</i>	0 <i>Due to conduct master training next year</i>

\*Certification at the discretion of a Stanford Certifying T-Trainer