 Workshop Tracker for Leaders

Below are different examples of what leaders can do to remain active. The following page is a worksheet to help you keep track of what you need to do to remain an active leader. These [guidelines](https://www.selfmanagementresource.com/docs/pdfs/Certification_Guidelines_2017.pdf) apply to each program you are trained in; you will need to do one workshop or refresher a year for each program. (For example, if you are trained in PATH, Diabetes PATH and Chronic Pain PATH, you will have to do 3 workshops; one of each type.)

# **Self-Management Resource Center Active Status Guidelines for Leaders** (effective February 21, 2017)

**Example:** These 5 leaders all attended the same leader training, which ended on March 15, 2015. They all have the same anniversary date of 03/15/XX. (**Training Date\*:** March 15, 2015, **Anniversary Date\*\*:** March 15 of each year)

|  | Year 1  3/15/15 to 3/14/16 | | Year 2  3/15/16 to 3/14/17 | | Year 3  3/15/17 to 3/14/18 | | Year 4  3/15/18 to 3/14/19 | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Leader Name | Workshops Completed | Refresher | Workshops  Completed | Refresher | Workshops Completed | Refresher | Workshops Completed | Refresher |
| *Daisy* | *0*  *Lapsed\*\*\** | *Not allowed the first year after training* | *N/A* | *N/A* | *N/A* | *N/A* | *N/A* | *N/A* |
| *Minnie* | *1*  *Remains active* | *1*  *Remains active* | *0*  *(Not needed)* | *2*  *Remains active* | *0*  *(Not needed)* | *1*  *Remains active* | *0*  *(Not needed)* |
| *Mickey* | *1*  *Remains active* | *1*  *Remains active* | *0*  *(Not needed)* | *0* | *1*  *Remains active* | *2*  *Remains active* | *0*  *(Not needed)* |
| *Walt* | *2*  *remains active* | *2*  *Remains active* | *0*  *(Not needed)* | *0* | *0*  *Lapsed\*\*\** | *N/A* | *N/A* |
| *Don* | *1*  *Remains active* | *0* | *1*  *Remains active* | *0* | *Not allowed 2 years in a row; Lapsed\*\*\** | *N/A* | *N/A* |

\*Training Date (mm/dd/yyyy): The last day of the leader training.

\*\*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.

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

 Workshop Tracker for Leaders

**Directions:** Fill in your training and anniversary dates to determine when you need to have your workshop(s) and/or Refresher training completed.

* There is only one version of the Leader Refresher Training and it applies to all of the different PATH programs.
* This tool applies to Leader Status only. Please see the [Self-Management Resource Center Certification Guidelines](https://www.selfmanagementresource.com/docs/pdfs/Certification_Guidelines_2017.pdf) for more information.
* Training Date is the last date of your leader training.
* **If you are trained in multiple programs:**

1. After training or cross-training in a new program, you must facilitate at least one 6-week workshop (all six 2.5-hour sessions) within 12 months from training date.
2. Every 12 months, you must facilitate all six sessions of one 6-week community workshop.  If you are unable to conduct a full workshop then you may take a refresher training. (There is only one type of refresher training that covers all programs.)  A refresher training can only be taken every other year to keep your certification.
3. Every 2 years, you must conduct all sessions of one 6-week workshop for every program for which you are active.

**PATH Training Date:** *Click here to enter the last date of your PATH Training*

| Year 1  Date to Date | | Year 2  Date to Date | | Year 3  Date to Date | | Year 4  Date to Date | | Year 5  Date to Date | | Year 6  Date to Date | | Year 7  Date to Date | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date of Workshop | Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher |
| Date | *Not allowed in Year 1* | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date |
| Date of Other Workshop | *Not allowed in Year 1* | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date |

**Diabetes PATH Training Date:** *Click here to enter the last date of your Diabetes PATH Training*

| Year 1  Date to Date | | Year 2  Date to Date | | Year 3  Date to Date | | Year 4  Date to Date | | Year 5  Date to Date | | Year 6  Date to Date | | Year 7  Date to Date | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date of Workshop | Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher |
| Date | *Not allowed in Year 1* | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date |
| Date of Other Workshop | *Not allowed in Year 1* | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date |

**Chronic Pain PATH Training Date:** *Click here to enter the last date of your Diabetes PATH Training*

| Year 1  Date to Date | | Year 2  Date to Date | | Year 3  Date to Date | | Year 4  Date to Date | | Year 5  Date to Date | | Year 6  Date to Date | | Year 7  Date to Date | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date of Workshop | Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher |
| Date | *Not allowed in Year 1* | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date |
| Date of Other Workshop | *Not allowed in Year 1* | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date |

***Click here to enter program type*** PATH Training Date: *Click here to enter the last date of your Diabetes PATH Training*

| Year 1  Date to Date | | Year 2  Date to Date | | Year 3  Date to Date | | Year 4  Date to Date | | Year 5  Date to Date | | Year 6  Date to Date | | Year 7  Date to Date | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date of Workshop | Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher |
| Date | *Not allowed in Year 1* | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date |
| Date of Other Workshop | *Not allowed in Year 1* | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date |

***Click here to enter program type*** PATH Training Date: *Click here to enter the last date of your Diabetes PATH Training*

| Year 1  Date to Date | | Year 2  Date to Date | | Year 3  Date to Date | | Year 4  Date to Date | | Year 5  Date to Date | | Year 6  Date to Date | | Year 7  Date to Date | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date of Workshop | Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher | Date of Workshop | Date of Refresher |
| Date | *Not allowed in Year 1* | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date | Date |
| Date of Other Workshop | *Not allowed in Year 1* | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date | Date of Other Workshop | Date |