Program Leader

NAMI Program Updates

Updated July 2018
AGENDA

1. Administrative: Usage of Fillable forms
2. Financials: W-9
2. Profile Center
3. NAMI 360
4. Program Updates
5. Resource Tools
6. Regional Trainings
7. Q & A
Please use the fillable forms and return to Wendy:

1. **Curriculum Manual Order form**:  
   Please make **requests 3 weeks prior** to class start date.

2. **Certificate Request Form**:  
   Please request certificates **3 weeks before** class ends

3. **Final Course Report Form**:  
   Please **report within thirty (30) days** of last class class to receive program stipend

4. **Presentation Report Form**:  
   Please **report within thirty (30) days** of presentation to receive presentation stipend(s)
Part I: Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. This TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see What Name and Number To Give the Requester for guidelines on whose number to enter.

Part II: Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me) and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

• Form 1099-INT (Interest earned or paid)
• Form 1099-DIV (dividends, including those from stocks or mutual funds)
• Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
• Form 1099-S (proceeds from real estate transactions)
• Form 1099-K (merchant card and third party network transactions)
• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
• Form 1098-C (canceled debt)
• Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.
Profile Center

If you are a Model-A NAMI Affiliate:

* Any additions/uploads can be done by a Model-A affiliates
* Model-B affiliates, Tammie will upload documents.
* Any deletions can only be done through Tammie.

Upload & Keep Updated:
* All documents on a regular basis
* NAMI Signature Program Form
* Board of Directors List
Update local NAMI affiliate profile via your membership contact person

State/Affiliate Profile:
*Update program profile for public view

Affiliate Leader Profile:
*Update all roles in your local affiliate

Managing Household Memberships
You can now add additional people to an active Household membership. Please reference the instructions that were emailed to active Household users on Friday, Oct. 20. The instructions will also be available in the Membership Tools area of the Extranet. If you run into any issues with the system, whether it is related to Household membership or any other issue, please contact memberservices@nami.org with the problem so we can assist you.

*****
Model-A NAMI Affiliates, please post and update:
Upcoming classes and current support groups via your programs person:
Please contact and notify Tammie the name(s) of your volunteer(s), the NAMI Program that they received upon (re)certification.
Model-A NAMI Affiliates:
Please report your data to NAMI National.

Please go to:
www.nami.org/programdata

Please do not send data to NAMI-NYS.

Model B NAMI Affiliates:
Please send data to Wendy. NAMI-NYS will upload the data.
# Reporting Data:

## Classes Survey: New Item

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program *</td>
<td>List both teachers/mentors who can provide more information on the class if requested. Please separate the names with a comma.</td>
</tr>
<tr>
<td>Teacher/Mentor Name/s *</td>
<td></td>
</tr>
<tr>
<td>Teacher/Mentor Email</td>
<td></td>
</tr>
<tr>
<td>Facility Street Address or Name</td>
<td></td>
</tr>
<tr>
<td>City *</td>
<td></td>
</tr>
<tr>
<td>NAMI Affiliate *</td>
<td>Type the abbreviation of your State, then scroll to choose your Affiliate. CN=Canada, IT=Italy, MX=Mexico, PR=Puerto Rico, VI=Virgin Islands</td>
</tr>
<tr>
<td>Date Class Ended *</td>
<td></td>
</tr>
<tr>
<td>Number of People Starting the Class</td>
<td></td>
</tr>
<tr>
<td>Number of Veterans, Active Duty or Related Participants? *</td>
<td>This number cannot be larger than the participation number reported above, i.e. if there were 10 total participants and 6 were veterans, then report 6.</td>
</tr>
</tbody>
</table>
1. Ensures the reputation of your NAMI affiliate
2. Protects your affiliate
3. Gives you the ability to be sustainable and grow partnerships
   eg: ability to submit grants and meet outcomes, data is helpful for strategic planning, membership drive, etc…
Programs Updates:

- **Family-to-Family**
- **Family & Friends**
- **Peer-to-Peer**
- **Ending the Silence**
- **In Our Own Voice**
Training Applications

1. Local affiliates please make sure you keep a list of potential candidates for upcoming trainings. **NAMI-NYS will not be keeping a waiting list.**

2. Please make sure the application and information are 100% complete, are reviewed and endorsed by your local affiliate and then forwarded to NAMI-NYS from your affiliate.

   **NAMI-NYS WILL NOT process any applications without the endorsement from your local affiliate.**

3. Please Make sure your participant is a good fit and vet them thoroughly. eg: demonstrates consistent NAMI involvement, dedication, and understanding of NAMI’s mission, principles and values by tabling, attending NAMI events, NAMIWalks, etc…

   **Your volunteer staff are representatives of your affiliate.**
1. No definitive decision yet on condensed version of F2F to 10 weeks.
2. Revised F2F manual will be released in 2019. All teachers will receive new manuals.
1. 4-hour seminar available beginning of July 2018
2. Not a replacement for our NAMI signature programs
3. Recommendation to offer Family & Friends every 4-6 weeks in your affiliate.
4. Led by two (2) experienced teachers of NAMI Basics, NAMI Family-to-Family, or NAMI Homefront.
   2.5 hour training available online.
5. Seminar may be offered in-person or via video-conferencing.
6. e-book is a downloadable, companion piece to participants that is not needed during the seminar. Available in 7 languages.
1. Only re-affiliated affiliates will be considered
2. $500.00 available for each qualified NAMI affiliate.
3. $250.00 will be released once two (2) affiliate members are certified to lead seminar; and two (2) seminar dates are inputed into the NAMI Portal. Remaining $250.00 will be released once two (2) online evaluations of the seminar are submitted via the NAMI Portal
4. Grant available online by late July 2018
1. Use consistent email contact
2. Make sure individual has the correct designated title in order to make recommendation and also take online training
3. Use updated version of Chrome
4. Check Spam for email notifications
5. Must use the same computer to complete online training: allows participant to stop and save and resume training.
All Presenters/Leaders **must:**

- Have a Program Coordinator to oversee the program
- Be recommended to train by their local NAMI affiliate through appropriate portal.
- Have a NAMI account. Username and password must be the same account that is recommended to the portal.
- Be a NAMI member in good standing, i.e. active membership
- Have access to a computer and use the same computer for entire training.
Step 1: Access Appropriate portal.
Select Program

step 3
<table>
<thead>
<tr>
<th>Date</th>
<th>Program</th>
<th>Submitter</th>
<th>Program Leader</th>
<th>State Chapter</th>
<th>Affiliate</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/03/2018</td>
<td>ETS Young Adult</td>
<td>Sharon McCarthy</td>
<td>Lauren Waite rs</td>
<td>NAMI New York State</td>
<td>NAMI Westchester County</td>
</tr>
<tr>
<td>07/02/2018</td>
<td>IOOV</td>
<td>Sharon McCarthy</td>
<td>Terry Brennan</td>
<td>NAMI New York State</td>
<td>NAMI Westchester County</td>
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</tr>
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</table>

Affiliate Program Contact
Program Director, Administrator, Manager, etc…

Person you are recommending
1. Program Leader (person who is recommended to take online training) will receive a fidelity agreement in their inbox within an hour after the recommendation is made. If not received, please check spam or contact: onlinetraining@nami.org

2. Program Leader will accept fidelity agreement and then will receive the link to gain access to online training.

If you are training in a group, please make sure these preliminary steps are done before you meet!
For any issues regarding the online training, please reach out to: onlinetraining@nami.org
Current Peer-to-Peer Leaders
and
New Peer-to-Peer leaders
*Must be recommended by affiliate and uploaded to portal

Current Peer-to-Peer Leaders
*Receive Fidelity Agreement
*Take online training (4-6 hrs)
*Must be re-certified by the end of 2018

New Peer-to-Peer Leaders
*Receive Fidelity Agreement
*Attend Hybrid Training
(Take online 4-6 hour training AND attend 1.5 day in-person state training)

Spanish Online training available early 2018!
1. Peer-to-Peer is now open to those participants who are undiagnosed and do not need to be in treatment.
2. Peer-to-Peer Class is now taught in 8-weeks instead of 10-weeks.
3. Relapse Prevention Grid covered in 1 class instead of throughout entire class.
4. Mindful exercises replaced with Relaxation techniques. No extra supplies needed.
5. Videos are shown and a script is available for Peer-to-Peer Leaders to read in lieu of video.
7. Tailored to younger population:
   * language updated
   * focus on healthy relationships through social media
   * how to have an effective conversation to your clinician
   * less focus on medication, more on alternative: EMDR and holistic
8. No more time keeper: only two (2) Peer-to-Peer Leaders
Current IOOV speakers and New IOOV speakers Must be recommended by affiliate and uploaded to portal

**Important to contact Tammie and Tina when New IOOV speakers complete online training**

**Current IOOV Speaker**
*Must take 4-6 hour online training*
*Does NOT need to attend 1-day in person training*

**New IOOV Speaker**
*Must attend Hybrid Training:*
- Take 4-6 hour online training
- Attend 1 day in person State training.
Offered in a “packet”

*Ending the Silence for Students*  
(50 minutes)

**

*Ending the Silence for Educators*  
(1 hour)

**

*Ending the Silence for Parents*  
(1 hour)
Current ETS Lead Presenters and Young Adult Speakers:

* Have been grandfather claueded in and DO NOT need to take online recertification. They can continue to present without further training.
* The new PowerPoint has only visual updates, not content updates.
* However, if Lead Presenter would like to present: Ending the Silence for Educators and Ending the Silence for Parents, they must take the online training.
New ETS Lead Presenters and Young Adult Speakers

- Local NAMI affiliates must enter recommendations via NAMI portal.
- New trainees will receive email from NAMI National that will give them access to online training link.
- Local NAMI affiliates will be able to have live updates on when the trainees have completed the online training.
- Local NAMI affiliates Program Coordinator must schedule an in-person training with trainees to complete certification.
Grants will be available until 2019!

Grant #1:
One time $1000 for those NAMI affiliates that have never offered an ETS presentation and are re-affiliated:
*Receive $500.00 upon completion of 4-week, 1-hour webinar boot camp
*Receive $500.00 upon presenting and reporting five (5) ETS presentations

**Next Bootcamp: Wednesday, July 25th, 2018**

Grant #2:
One time $1,000 for those NAMI Affiliates that are re-affiliated and are already offering ETS presentations and would like to expand the program into a new school, district, community, etc…
*Receive $500.00 upon acceptance of application
*Receive $500.00 upon presenting and reporting five (5) ETS in the expansion area
To apply for ETS grant, please email Alex: adorgan@nami.org
Training of Trainers

October 12-14, 2018
Spring: April 2019

To qualify for Peer-to-Peer state trainer:
1. must have taught 1, 8-week P2P class
   or
2. have taught at least 3 weeks of 8 week P2P class
Outreach Tools:
Can be found at: www.naminys.org
Please add to your website.
Use as an outreach tool.
Handout in NAMI classes/support groups.
https://www.mentalhealthednys.org/
Please Join Us…
*Virtually
*In-person!

Join Us and Walk for Wellness.
STRONG Bodies start with STRONG Minds.
Be a part of the solution!

NAMIWalks NYS 5K
Saturday, September 29th, 2018
8:30 am Registration
10:00 am (walk starts) - 2:00 pm
Jennings Landing
1 Quay Street, Albany NY

** Free Parking ** Live Music ** Activities for Kids ** Wellness Fair **

For Vendor and Sponsorship opportunities, please contact: tina@naminys.org 518-462-2000

To start a walk team, please visit: http://bit.ly/NAMIWALKS-NYS
Regional Trainings
Wendy: wendy@naminys.org
Tina: tina@naminys.org
Tammie: tammie@naminys.org
THANK YOU

for you for hard work and dedication!

NAMI-NYS