

Best Practices Manual

MHFACO

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So, you're trained as a Mental Health First Aid Instructor. Now, what?

The next step is to familiarize yourself with all the resources available to make your life easier as a MHFA instructor and to help you deliver classes smoothly. These resources will be a little different for each of you, because you come from different organizational and professional backgrounds, and hope to serve different audiences. Your best bet is to spend some time familiarizing yourself with a few key resources before you actually need them

(i.e., the proverbial 11th hour)

## www.mhfaco.org

where you will find instructor support, resources for marketing and delivering your classes, and updates on what is happening in Colorado.

## www.mentalhealthfirstaid.org

where you will order books for your classes, manage your instructor profile, and enter evaluations from your course participants after you have taught a course.

## algee@thenationalcouncil.org

whom you will email about maintaining your instructor certification, managing your information as it appears on the National Council site, and any difficulties ordering materials or entering course evaluations.

### algee@mhfaco.org

whom you will email about all your other questions, existential crises, etc.



### Mental Health First Aid Colorado

Mental Health First Aid Colorado provides coordinated and strategic leadership, critical infrastructure, and the necessary implementation supports to facilitate the statewide growth of both adult and youth Mental Health First Aid.

We are a coalition driven by community non-profit organizations across Colorado and various state agencies, with leadership from the Colorado Behavioral Healthcare Council.

The backbone of MHFA Colorado is a growing network of instructors (that's you!) who are trained to inspire public understanding and involvement through teaching the signs and symptoms associated with mental health and substance abuse issues, and, in turn, to normalize the conversation about mental health while combating stigmas.

At www.mhfaco.org, you can log in to access instructor resources, access funding information, and register your courses.

Your instructor login will be the email address we have on file for you.

Your initial password will be:

#### 1800273TALK

(which is the number for the National Suicide Prevention Hotline) We'll email you 1-2 weeks after the training, when your login is ready.

Please log in, explore, and change your password.

# The National Council for Behavioral Health

The National Council manages:
the Mental Health First Aid curriculum
your instructor status
course evaluations
course materials
specialty modules

## You will have a separate instructor login with the National Council.

This login will be emailed to you 4-6 weeks after your instructor training.

This means you cannot order materials for your classes until after that time, so please wait until you have your instructor login with the National Council to set up your first class.

You will also find the webinar training for each specialty module through the National Council site (more on modules later).



#### **MHFACO:**

Local resources

Submit a class to the MHFACO site

Funding for classes

Communications and marketing

Teaching opportunities

Instructor network

Best practices for teaching in Colorado

#### **National Council:**

National resources

Instructor certification

Ordering course materials

Questions about your certification, MHFA policies & procedures

MHFA curriculum & specialty modules

Course evaluations





We are your personal connection to the National Council: we have the same goals, and while we can't order books for you or manage your certification, we will keep you up to date on their policies and resources, and help you make this program as successful as possible at the state level. We'll come support you in person, connect you with local dollars to support MHFA, and help make the program sustainable across our state.

Instructor

resources

and news

## Setting up a class:

Church basements, libraries, and other community spaces are excellent (and sometimes free) host sites for a Mental Health First Aid class.



Begin planning at least 8 weeks before you hope to deliver your class. This will allow you time to pursue funding opportunities, if applicable, and to market your class on the MHFACO site and elsewhere.

For your first class or two, find an experienced MHFA instructor who can co-host the course with you. If you are the lone wolf MHFA instructor (spirit animal) at your organization, MHFACO can help connect you will savvy instructors. More on this below.



Begin by submitting your class on the MHFACO website. Log in using your instructor username and password and give us the details so folks can register for your class on the site.

We will send you an update with contact information for your participants a week before your class, and again the day before. That way, you can send reminder emails so folks don't forget to show up-there's an example in the Appendix.



## There are a number of ways to cover the costs associated with a Mental Health First Aid class:

- 1. Apply for OBH funding. The Office of Behavioral Health has awarded MHFACO funding to support classes for special target audiences: military veterans and families, first responder audiences, Spanish-language communities, and historically underserved populations. You can apply for this funding by using your instructor login at www.mhfaco.org.
- 2. Charge participants for the class to cover expenses. Because the course is valued at \$60/person, if groups have funding to cover the training, it's totally legitimate to ask them to cover expenses like the venue, books, lunch, and other materials.
- 3. Apply for individual grants: a number of community organizations have funding to support projects like MHFA in their communities, and if you poke around, you can apply for funding to support a class or two.
- 4. If you're teaching a Youth MHFA class, Project AWARE grantees like CDE and AWARE-C can pay for your class. Find out more at www.mhfaco.org, or check out the Guide to Funding infographic in the appendix.



## Marketing your MHFA class:

MHFACO has a complete Communications Guide available for your use at our website, www.mhfaco.org. Use your MHFACO Instructor Login to access poster templates, flyers, and a community resource template. You can also find sample press releases, logos, and graphics for developing your own materials.

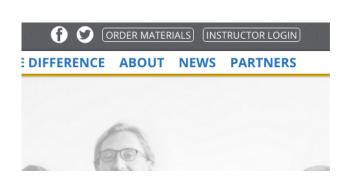
#### Some general tips and tricks for marketing classes:

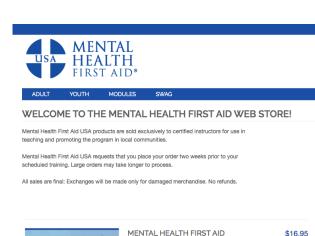
- 1. Start **early**. It can take several weeks to fill a class- and keep in mind that up to 25% of folks who sign up for a community class may not show up on training day. As soon as you have the details organized for a class, you should begin your marketing plan.
- 2. If you have a captive audience for a training, like all new staff at your organization, or a school district, you are not off the hook for marketing: it's important to let your participants know **what to expect** and where to find more information about Mental Health First Aid before the class.
  - A simple email flyer with the details can make a big difference.
  - 3. If you **design your own marketing materials,** make sure the design matches the landing page (point to which you are directing folks for additional information and registration) for your MHFA program. For example, all MHFACO marketing materials use the same **font, logo, and colors**. Help us build the MHFA brand! You may want to use the logos and graphics in the Communications Guide to help.
- 4. Think about your intended audience when designing marketing materials. If you don't know what would appeal to a particular community, **ask someone** who does. This will make your posters and flyers much more effective.

### Ordering Materials

#### MHFA MANUALS:

- 1. Go to www.mentalhealthfirstaid.org.
  That's the National Council site- you can't order books from MHFACO.
- 2. Click on "Instructor Log-in" at the top right to sign in with your account. You'll get your login by email a few weeks after your instructor training.
- 3. Click on "Order Materials" at the top right. This should take you to this page: http://mhfastore.org/index.php/ where you can select Youth, Adult, or Module materials
- 4. Select the MHFA Manuals that you need. Order a few extra: for example, if you have capped your class at 25 participants, we recommend ordering 30 or so. It typically takes 2-3 weeks to receive materials, and you might want to have materials shipped directly to your training location, since they're heavy.
  - 5. While you're there, treat yourself to some MHFA swag and an extra ALGEE or two, if you are so inclined.







MENTAL HEALTH FIRST AID
ADULT PARTICIPANT MANUAL
(STATISTICALLY UPDATED)
Parlicipant Manual First Edition (2016
statistically updated version). Learn More

ADD TO CART



ADULT MENTAL HEALTH FIRST AID CAR DECAL

Trained in Adult Mental Health First Aid? Add this 4 ½" x 4 ½" x 6cal to your car to let other drivers and passerby know that you're trained to help—after all, you never know when your skills might come in handy. Learn More.

ADD TO CART

Add to Compare

\$5.00



#### LOCAL RESOURCE HANDOUTS:

You will need some materials with information about local mental health resources and emergency services to give your newly certified First Aiders.

#### Here are some options:

- 1. Your organization may have resource materials available. Ask the marketing department or development team what they recommend, or ask them to design something for first aiders! Small wallet cards with simple information (like one phone number or website) are popular for behavioral health resources.
- 2. Contact your local community mental health center for Colorado Crisis Services cards that have the location of your closest walk-in center. Better yet, visit a walk-in center, if you haven't already! We included a copy in the Appendix for you, too.
- 3. Use the template included in this packet to make your own guide to local resources- just make sure it's okay with the organizations to be marketed this way. Some very small organizations with limited funding can't handle every crisis or emergency, or need to save their resources for a specific audience.



### Finding a co-instructor:

## Best practice for Mental Health First Aid is to teach this course with one other instructor.

While you are allowed to teach MHFA by yourself, nobody wants to listen to you lecture them for eight hours. Change it up.

If you are teaching a speciality module (more on this below), make sure at least one of you has experience in the field of the target audience you're teaching. For example, if you are teaching first responders, at least one of you should be a former first responder, or have a close connection to this field. You must both have completed the MHFA specialty module for the field you are teaching if you choose a special audience.

You can learn a lot from a good co-facilitator, especially as a new instructor! If your organization has a Mental Health First Aid coordinator, ask them to pair you up with an experienced co-instructor for your first course. If you do not have a MHFA coordinator, pair up with another instructor from your organization, or reach out to algee@mhfaco.org for help finding someone with whom to teach.

### Instructor Checklist:

#### Before the MHFA Course:

- Make sure you have a copy of the PowerPoint on the desktop of your laptop, and bring your flash drive.
- Split up the timing guide with your co-facilitator so you know who will be presenting each section.
- Print a sign-in sheet (or copy the one in the Appendix), and make 35 copies of each handout you will be using: the MHFA Opinions Quiz, Auditory Hallucinations Script, MHFA Quiz, Evaluation forms, certificates for each participant, and any other materials you're going to need.
- Bring candy, a remote clicker, pipe cleaners or fidget toys, card stock for nameplates or stick-on name tags, markers for each table, a Sharpie to write certificates, speakers for the videos, an easel with a sticky easel pad for presentation and group activities, and your Padfolio with the thumb drive and Teaching Notes. If you're going to need AV connecting cables or a computer adapter, make sure you bring it and test out the setup before the course starts!

#### Day of the MHFA Course:

- Arrive at least 30 minutes early to set up the PowerPoint and laptop, projector (Don't forget speaker set up!), easel stand and easel o Arrange participants in groups of 4-6 and set out manuals, card stock, markers, and pipe cleaners
- Have each participant sign in.

#### After MHFA Course

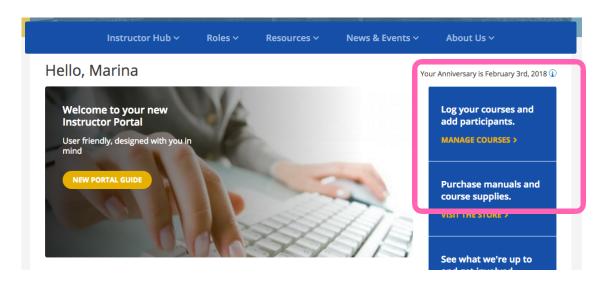
• Use Evaluations and Sign-in Sheet names/emails to enter evaluations and course onto MHFA Website (www.mentalhealthfirstaid.org). Your other option is to email participants for feedback, but keep in mind that you're more likely to get responses if you hand out paper evaluations the day of the course and enter them yourself. Make copies of the evaluations if your institution needs to keep records of these things, and take care of any internal record-keeping to make sure participants get credit for their certification.

## **Entering Evaluations**

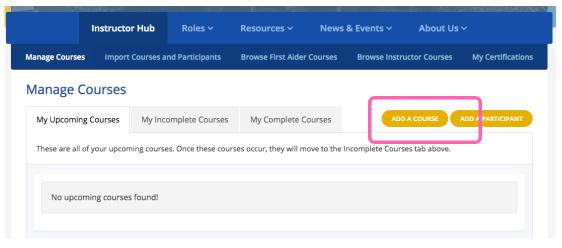
At the end of your MHFA course, you will hand out an evaluation for participants to offer feedback on the class. To report these evaluations to the National Council, which you must do to receive credit for teaching the course, you have to list the class on their site.

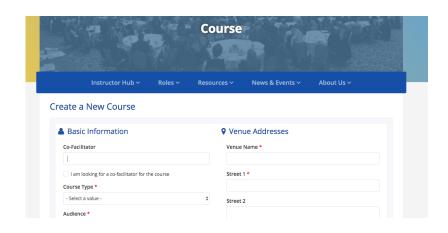
This is pretty simple (there's a video guide to the Instructor portal when you log in, but we've laid it out for you here):

Before or after your class, login to the National Council website, www.mentalhealthfirstaid.org, with your National Council instructor login that you will receive by email, 3-4 weeks after this training.



From the login landing page, select "Manage Courses" on the right.



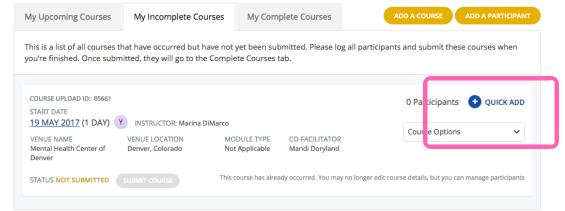


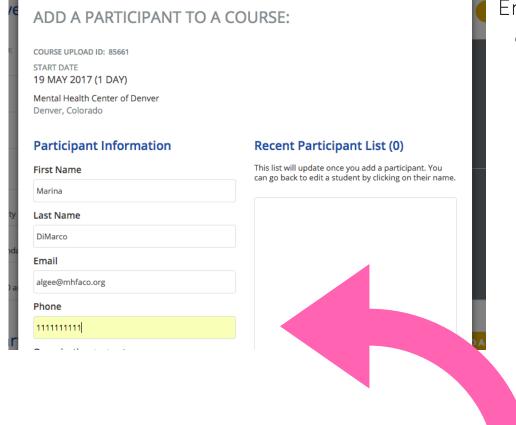
The "Add a Course" button will take you to a page where you can enter all the details for a class. Once you click "Done," it will move the course to the "My Incomplete Courses" Tab.

Select "Add a Participant."

You can also add participants from the "Quick Add" button under "My Incomplete Courses"

#### Manage Courses

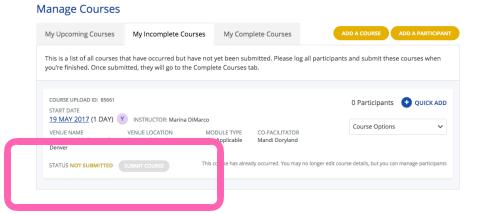




Enter the information for each participant from the sign-in sheet.

If you don't have a phone number for a participant, you may enter 111111111.

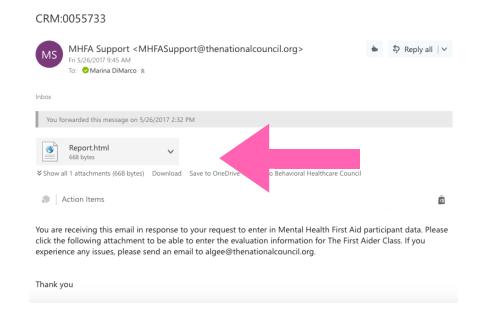
Once you have entered all your participants, click "Done." Then go to "My Incomplete Courses" to mark all your participants as passed. Finally, you can submit your course - just click the "Submit" button.



Now you can enter evaluations! Head over to the "My Complete Courses" tab, where you'll find a "Course Options" dropdown menu for each course you've submitted.

Select "Email for Evaluation
Data Entry" to receive an
email (it'll go to whomever is
listed as the email contact for
the course) with a Report that
contains a link for each
participant. You can enter one
eval per link - it doesn't have
to be that person's own
evaluation, since they're
anonymous.





## Keeping up Your Instructor Certification

You are a certified Mental Health First Aid Instructor!
Right now!

To stay certified, you must teach and enter evaluations for at least 1 course within six months of this date, and 2 more courses between today and this date next year. To be clear, the 3 courses per year rule means from your anniversary as a MHFA instructor (e.g. today), not the calendar year. Your anniversary date is the day you complete your training, not the day you receive your instructor login info from the National Council.

When you co-teach a MHFA class with another instructor, you both receive credit for the class.

If you have trouble offering three classes on your own or with your organization, please reach out to MHFACO! We can help connect you with other teaching opportunities.

If you are absolutely desperate, the National Council will occasionally grant you a brief extension to the one-year period to allow you to deliver the required classes without having your certification lapse.

This is not like an extension on your math homework. This is very annoying to manage. Don't let this happen to you! If you are within three months of your anniversary date, and you haven't completed your courses, reach out to MHFACO so we can sort you out before you have to deal with this.

## **Specialty Modules**



In addition to being certified as an Adult and/or Youth MHFA Instructor, you can also be trained to deliver the course to a number of special audiences.

These include:

Active-duty Military, Veterans, and Military Families

Law Enforcement and First Responders

Rural Communities

Older Adults

Higher Education

Spanish-language Audiences

The Youth MHFA curriculum can also be delivered in Spanish. This is a separate module.

Unlike your Youth or Adult instructor training, these modules do not take five days. Instead, you can obtain your certification by logging in to the National Council site with your instructor login. There you will find webinars for the various modules you might wish to deliver. After watching the webinar, you'll take a quiz and pay a small fee for your new certification, which comes with some extra slides and resources specific to the mental health needs of the special target audience.

We would love to have you obtain a specialty designation if that is appropriate for you! We recommend that folks have some life experience in the specialty modules they wish to teach; in fact, we require that they do in order to qualify for OBH funding through MHFACO.

Experience in this area will give you credibility with the audience you seek to address. For example, veterans or active-duty military members make the best instructors for the Veteran module of MHFA. Likewise, first responders make the best instructors for the First Responder module. You can learn more about MHFA modules at mhfaco.org, or in the Appendix.

# Language and Inclusivity in MHFA Classes



When you teach Mental Health First Aid or Youth MHFA, you will encounter trainees of diverse identities and from many communities. Here's a short guide as a starting point for you to explore ways to make your classes inclusive and respectful of the identities of all your participants:

Ask your participants for their preferred gender pronouns at the beginning of a training, or offer that they may write them on their name card. This gives folks the option of declaring their gender identity, and prevents you from mis-gendering a participant (incorrectly referring to someone who identifies as a man as a woman, for example). Examples of gender pronouns are she/hers/herself, he/him/himself, they/them/themself. You may have discussed person-first language in your instructor training, and it is important to maintain awareness for yourself as well as for your trainees about the impact that person-first language can have for people affected by disabilities and mental health conditions. The following resources are great for continuing education about person-first language:

https://www.thearc.org/who-we-are/media-center/people-first-language http://www.tcdd.texas.gov/resources/people-first-language/

This handout from the CDC may also be of use to you and to your participants: https://www.cdc.gov/ncbddd/disabilityandhealth/pdf/disabilityposter\_photos.pdf

LGBTQ+ youth are disproportionately affected by mental health challenges and suicide. You may want to provide the following resources for support in addition to the National Suicide Prevention Hotline and Colorado Crisis Services:

The Trevor Project Hotline (for LGBTQ+ and questioning youth): 1-866-488-7386
The Trans Lifeline (for transgender and questioning youth and adults, manned by people who identify as transgender): 877-565-8860

If you are serving a community that you do not know well, do some research beforehand! It is important to be aware of cultural considerations for your audience. If you are not sure if any special considerations apply to your audience, reach out to an organization that serves the particular group you are going to train- these organizations are usually excited to hear from you and to help you best meet the needs of the community.

## APPENDIX

This guide is just the beginning.

You can find everything you need to know at our website, www.mhfaco.org.

You can also find lots more information at the National Council site,
www.mentalhealthfirstaid.org.

Here are some additional templates and resources to get you started.

Good luck!
Welcome to the team!

We will happily answer your questions at algee@mhfaco.org



#### FAQ: Mental Health First Aiders – questions you may encounter in your classes

#### How long does my certification last?

You are certified for three years, but you can take a refresher any time you want. You can renew your certification by attending another class or taking a quick webinar at www.mentalhealthfirstaid.org.

#### Do I have to use Mental Health First Aid?

No. You are not obligated to use what you learn in Mental Health First Aid, and you should always put your own safety first when you are considering using MHFA. If you do decide to use MHFA, you are covered by the Good Samaritan law, which protects physical first aiders as well. Use MHFA when it is appropriate and safe!

#### What if someone doesn't want my help?

At the end of the day, you are not responsible for others (except to the extent that your profession might require you to intervene). Persistence can be helpful, and so can giving a person many options, like calling or texting the Colorado Crisis Line, attending a support group, or learning to meditate with an app on their phone. If a young person doesn't want help, a conversation with their parents or school counselor could be productive. If parents don't want help for their child, a young person 15 or older can seek outpatient treatment independently. This doesn't include medication or inpatient treatment, but it might be a good place to start. Often, it takes time for someone to come to terms with a solution on their own. Be patient!

#### Are there more advanced or specific suicide prevention programs?

Yes! Mental Health First Aid is a great place to start because we cover the basics of a broad spectrum of situations you might encounter, but trainings like QPR (Question, Persuade, Refer), Working Minds (workplace Suicide Prevention) and Safe2Tell can give you more specific resources for suicide prevention. If you're looking for a Mental Health First Aid class tailored to specific audience, like law enforcement or military veterans, check out our guide to types of MHFA here.

#### How do I organize a training for my organization/business/church etc.?

Shoot an email to <u>algee@mhfaco.org</u> with your questions! We will connect you with a MHFA coordinator or instructor team close to your community. Usually an organization can host an internal training for 15-35 people at a time.

#### What about my mental health?

We're so glad you asked! Self-care is incredibly important for first aiders. Check out this **map** with all of our amazing community mental health centers in Colorado! You can access more information about local resources and Colorado Crisis Services **here**. If you are in crisis, call the National Suicide Prevention Hotline at 1-800-273-8255.

#### Is there an age requirement to be certified as a MH First Aider?

The minimum age is 16, but for many young people, the material in the MHFA curriculum makes them feel personally responsible for the well-being of those around them. A conversation with parents or mentors of a young person is often necessary to determine whether it would be appropriate for a young person to take Mental Health First Aid.

FAQ: Mental Health First Aiders – questions you may encounter in your classes

#### FAQ for MHFA Instructors:

#### How do I find a co-instructor if I am not connected to a coordinator?

Shoot an email to <a href="mailto:algee@mhfaco.org">algee@mhfaco.org</a>. We can connect you to local coordinators and independent instructors. If you need to find teaching opportunities in order to keep up your certification, let us know as soon as possible. Coordinators always need more instructors to broaden their reach!

#### How can I find funding for my classes?

We're so glad you asked. You can sometimes find funding through individual community grants, but the Office of Behavioral Health and the Colorado Department of Education also support adult and youth MHFA classes, respectively. See the Guide to Funding for more info.

#### Why do I have a separate login for MHFACO and the National Council sites?

We're a separate entity from the National Council. You can use the same login for both sites, if you want- we use the email you gave us when you trained as an instructor, and you can set your passwords for both accounts to match, if that's easier. The logins are separate because you use our site for instructor support, local resources, funding information, continuing education, and course listings. You use the National Council site to order course materials, enter evaluations from your courses, and manage your national Instructor Profile and certification status. For a complete guide to MHFACO vs. the National Council, look here.

#### I'm confused about how many courses I need to teach to keep my certification(s).

You must teach three courses per year to remain certified. Period. If you are certified in both Youth and Adult MHFA, you have to teach one Youth course per year, one Adult course per year, and the third is up to you. These requirements are for Adult or Youth MHFA, and don't include modules. If you're certified to teach a module (e.g. Veteran MHFA), you are NOT required to teach a particular number of Veteran MHFA classes. If you're worried about keeping your certification or finding classes to teach, please contact algee@mhfaco.org.

#### Do I have to have experience in a module in order to teach it?

You can be certified to teach a module, even if you don't have experience in that area (Spanish modules excepted- you do have to be bilingual to teach the course in Spanish). However, at least one instructor for a specialty module course should have experience in the area. For example, if two instructors teach the Veteran module, at least one should have military experience.

#### What is Project AWARE?

Project AWARE is a grant-funded initiative that supports Youth MHFA courses for any adults who work with Youth. You can learn more about teaching Youth MHFA classes for Project AWARE through the Colorado Department of Education or AWARE-C (City & County of Denver) here on our funding page.

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#### MHFA Instructor's Guide to Module Certifications:

Just like physical First Aid and CPR, which offer special trainings like Child & Infant CPR and Wilderness First Aid, Mental Health First Aid has tailored the curriculum to meet a few specific needs. These specific modules supplement the primary adult or youth curriculum, and don't leave out any material from the regular class. In choosing a Mental Health First Aid module certification, think about the people with whom you interact the most. Are they older adults, struggling with depression or dementia? Are they students in your high school class? Are they first responders, dealing with day-to-day crises in your community?

**First Responders:** Law enforcement, firefighters, EMTs, paramedics, and other first responders face unique challenges in their encounters with the public, many of whom may be in crisis. They may also be exposed to many traumatic events in the course of their work. This module focuses on strategies for first responders encountering someone with a mental health challenge or crisis, and extra self-care resources for those on the front lines.

**Veterans:** Honoring our active duty and veteran military service members includes making sure they have access to mental health services and support when they return home. Veteran MHFA is designed to equip military members and their families with the tools they need to recognize mental health challenges and access services in their communities.

**Older Adults:** Cognitive decline isn't the only brain health challenge affecting older adults-depression and anxiety occur among seniors as well. If you serve or care for older adults, this module is for you!

**Rural:** Access to services in remote rural and frontier counties can be logistically challengingnot to mention the challenge of fighting stigma in a small town where everyone knows your business! This MHFA class matches the strengths of rural communities with their unique barriers to accessing care.

**Higher Education:** College and graduate school can be intensely stressful, no doubt about it. For many, school presents the challenge of living on one's own for the first time, in addition to academic stress. This module is tailored to the needs of RAs, university staff, and students themselves.

**Spanish (Adult):** The Adult MHFA curriculum with no extra content, in Spanish.

Spanish (Youth): The Youth MHFA curriculum with no extra content, in Spanish.

When you receive your login information with the National Council, you will have access to the certification process (webinar, quiz, fee) for the modules. You can find them under "Curriculum" in the header. You can only access modules for the curriculum in which which you are certified (i.e. if you are an Adult MHFA instructor, you cannot access the Youth Spanish Curriculum).







December 2016

Greetings Adult MHFA Instructors,

The Colorado Behavioral Healthcare Council (CBHC) was awarded funding by the Colorado Department of Human Services, Office of Behavioral Health, to continue our efforts to strategically expand Mental Health First Aid (MHFA) across the state. CBHC and Mental Health First Aid Colorado (MHFACO) are pleased to solicit applications from organizations and individual instructors to fund MHFA certification trainings.

In this packet you will find guidelines and requirements outlining the necessary steps to qualify and apply for this reimbursement funding. To be considered for funding, please submit both the completed checklist and a course submission through the MHFACO website instructor portal following the timeline in the packet.

The OBH grant is specifically designed to fund Adult MHFA Courses. If you would like more information regarding possible funding for Youth MHFA Courses – please reach out to Michael Chevrier at the Colorado Department of Education via <a href="mailto:Chevrier\_M@cde.state.co.us">Chevrier\_M@cde.state.co.us</a>.

Thank you for your hard work to train new and unique audiences in MHFA this year. We are making a difference!

NOTE: Questions should be directed to <u>registration@mhfaco.org</u>.

Rachel Clements
Colorado MHFA Coordinator
Colorado Behavioral Healthcare Council
RClements@mhfaco.org







#### I. Background

An important part of Mental Health First Aid Colorado's (MHFACO) mission is ensuring trainings reach those in need across the entire state. Since MHFA came to Colorado in 2009, we have done a fantastic job of reaching Coloradans with MHFA. We have trained over 400 Instructors and over 29,000 participants in MHFA. To determine areas of need, data collected through MHFACO's evaluation was combined with existing research findings, and was informed by target populations identified through the state Office of Behavioral Health (OBH) and Colorado Legislator request. We hope to make MHFA an effective tool to decrease the stigma associated with mental health and to decrease suicides in Colorado, and we believe that the best way to do this will be by targeting a few select audiences.

Federal and State funding for MHFA is not guaranteed past July 2017, and in order to make MHFA courses sustainable, we strongly recommend that you not depend on MHFACO / OBH grants to offer classes. This grant is designed to help instructors bring MHFA to an organization where local partners can then support the program. For example, instead of one class for paramedics, we would like to see you use this funding to work with local organizations to make MHFA part of the onboarding process for all new paramedics, or make MHFA required for all new Police Officers during their new staff orientation. If you need ideas to help you create a successful and sustainable program, please contact MHFACO. We would love to help you! We will also be posting information on <a href="https://www.mhfaco.org">www.mhfaco.org</a> and in our Instructor Newsletter to help instructors develop and market sustainable classes.

The **Course Requirement Checklist** was created as a mechanism to equitably distribute funding for trainings while intentionally targeting populations underserved by MHFA. It was created in collaboration with the MHFACO Advisory Committee, composed of expert partners representing each facet of the MHFACO network, and approved by both the Advisory Committee and our partners at OBH.

Questions can be submitted via email at <a href="mailto:registration@mhfaco.org">registration@mhfaco.org</a> or by phone (720)-573-3590. Frequently asked questions will be posted to the website at <a href="www.mhfaco.org">www.mhfaco.org</a>. MHFACO is here to provide support to instructors and participants, and we are always more than happy to brainstorm with you or hear ideas about how we can better serve you. If you have questions about a specific audience, or need connections to local instructors who are certified in a particular module, please let us know, and we will facilitate these connections.









#### II. Criteria

- Priority will be given based on the checklist submission date, not based on the training date. (For example, a checklist submitted November 30, 2016 for a training April 1, 2017 will receive priority over a checklist submitted March 1, 2017 for a training April 1, 2017.
- Priority will be given to classes for which both instructors are trained in and are teaching the specialty module that is most appropriate for their audience, and classes for which at least one instructor has personal/professional experience in the relevant field.
  - o For example, if you would like to teach a MHFA class to a group of military personnel, you and your co-instructor both need to be trained in the Military Curriculum and at least one of you needs to have personal / professional experience with the Military.
- Please submit a course and the checklist online through MHFACO at least 60 days before your requested training date. This is important for collecting appropriate registration data from your participants.
- There will be a cap of 3 reimbursed classes per community/instructor/organization to ensure that funds are distributed evenly across the state.
- Completed checklists *and* course submissions must be submitted through the MHFACO instructor portal on the "Submit A Class" webpage. (See course submission policy)
- Only fully completed checklists will be considered.
- Within one week of submission, individuals will be notified of checklist approval.
- Checklist approval does not guarantee funding.
  - Course(s) approved for funding must be facilitated per expectations outlined in the checklist(s) to receive reimbursement.
  - o Approved courses must submit a reimbursement form to receive reimbursement money.
  - Instructors for approved courses must require participants to complete an OBH follow-up survey at the conclusion of the course, either at the link:
     <a href="https://www.surveymonkey.com/r/VVF8WN8">https://www.surveymonkey.com/r/VVF8WN8</a>
    - or in hard copy for instructors to enter at the link after the class (PDF attached).
- Reimbursement will be offered at a rate of \$40 per participant. This funding may be applied towards direct training costs (participant manuals, instructor time, food, etc.)
- After a course has been completed and MHFACO has received the Instructors Reimbursement Form Checklist as well as MHFACO Sign-in Sheet and a completed W-9 for the individual or organization, we will mail a reimbursement check to the designated party.









#### **Course Reimbursement Checklist**

Only pre-approved Adult MHFA courses with completed checklists and completely answered questions will be considered for reimbursement. Checklist approval does not guarantee funding.

Please initial that you understand and accept each requirement, and answer the questions below.
You have submitted this course on the MHFACO website for registration.  Your course <b>must</b> have a minimum of 10 participants; reimbursement is capped at 25 participants.  If the course is approved for funding, the applying agency or individual instructor agrees to deliver a course to an identified underserved audience (defined below) by April 30, 2017.  Both instructors are trained in and are teaching the specialty module that is most appropriate for their audience, and at least 1 instructor has personal/professional experience in this field.  50% of the total course participants must represent at least one or more of the underserved populations identified through the evaluation data (listed below in alphabetical order):
<ul> <li>First responders (firefighters, EMTs, paramedics, etc.)</li> <li>Law enforcement (police, detectives, border patrol, Deputy Marshalls, DA's Office, etc.)</li> <li>Active duty and retired military personnel</li> <li>Minority and underserved populations</li> <li>Rural and frontier counties, as identified by the Colorado State Office of Rural Health (see MHFA OBH Colorado Rural and Frontier Counties 2015 Document – attached separately)</li> </ul>
Course date:
Please provide brief answers to these questions below or in a separate document. Only applications with complete answers to all of the questions will be considered.
1. Which of the above target audiences will be trained with resources from this funding source? Please provide specifics about the audience (names of agency(ies)/organization(s) involved)
2. If awarded this funding, what are your plans to sustain efforts beyond this initial opportunity?
By signing below, I agree to meet the requirements outlined in the checklist. Pre-approval of course submission does not equate to guaranteed reimbursement. Course reimbursement will only go to courses that meet all required checklist items and submit appropriate reimbursement documents.
SignatureDate
Name (print)





## Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

	Svoride Colvide				
	1 Name (as shown on your income tax return). Name is required on this line; do no	t leave this line blank.	·		
2 Business name/disregarded entity name, if different from above  3 Check appropriate box for federal tax classification; check only <b>one</b> of the following seven boxes:  4 Exemptions (codes					
s on	3 Check appropriate box for federal tax classification; check only <b>one</b> of the follow Individual/sole proprietor or C Corporation S Corporation single-member LLC	Partnership Trust/estate	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any)		
ctic	Limited liability company. Enter the tax classification (C=C corporation, S=S co	Exemption from FATCA reporting			
Print or type c Instruction	Note. For a single-member LLC that is disregarded, do not check LLC; check the tax classification of the single-member owner.	the appropriate box in the line above for	code (if any)		
Prich	Other (see instructions) ▶		(Applies to accounts maintained outside the U.S.)		
pecifi	5 Address (number, street, and apt. or suite no.)	Requester's name	and address (optional)		
See S	6 City, state, and ZIP code				
	7 List account number(s) here (optional)	,			
Par	Taxpayer Identification Number (TIN)				
	our TIN in the appropriate box. The TIN provided must match the name of	ivon on mio i to avoid	curity number		
backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a</i>					
IIN or	page 3.	or			
	the account is in more than one name, see the instructions for line 1 and	d the chart on page 4 for Employe	r identification number		
guidei	es on whose number to enter.		-		
Part	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 is	ssued to me); and		
Ser	not subject to backup withholding because: (a) I am exempt from backuice (IRS) that I am subject to backup withholding as a result of a failure tonger subject to backup withholding; and				
3. I ar	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 fr	om FATCA reporting is correct.			
becau interes genera	ation instructions. You must cross out item 2 above if you have been ne you have failed to report all interest and dividends on your tax return. Fe paid, acquisition or abandonment of secured property, cancellation of dly, payments other than interest and dividends, you are not required to signs on page 3.	or real estate transactions, item 2 do ebt, contributions to an individual re	pes not apply. For mortgage tirement arrangement (IRA), and		
Sign Here	Signature of U.S. person ▶	Date ►			
	· ·	,			

#### **General Instructions**

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

**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

#### **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 1099-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? on page 2.

By signing the filled-out form, you:

- 1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
  - 2. Certify that you are not subject to backup withholding, or
- 3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- 4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

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**Note.** If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- · An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States:

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

**Foreign person.** If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Publication 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items:

- 1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
  - 2. The treaty article addressing the income
- 3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
- 4. The type and amount of income that qualifies for the exemption from tax.
- 5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

**Example.** Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

#### **Backup Withholding**

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 28% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

#### Payments you receive will be subject to backup withholding if:

- 1. You do not furnish your TIN to the requester,
- 2. You do not certify your TIN when required (see the Part II instructions on page 3 for details),  $\,$

- 3. The IRS tells the requester that you furnished an incorrect TIN.
- 4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
- 5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code* on page 3 and the separate Instructions for the Requester of Form W-9 for more information.

Also see Special rules for partnerships above.

#### What is FATCA reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See Exemption from FATCA reporting code on page 3 and the Instructions for the Requester of Form W-9 for more information.

#### **Updating Your Information**

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

#### **Penalties**

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

**Misuse of TINs.** If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

#### **Specific Instructions**

#### Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account, list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9.

a. Individual. Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

**Note. ITIN applicant:** Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

- b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.
- c. Partnership, LLC that is not a single-member LLC, C Corporation, or S Corporation. Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.
- d. Other entities. Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.
- e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

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#### Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

#### Line 3

Check the appropriate box in line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box in line 3.

Limited Liability Company (LLC). If the name on line 1 is an LLC treated as a partnership for U.S. federal tax purposes, check the "Limited Liability Company" box and enter "P" in the space provided. If the LLC has filed Form 8832 or 2553 to be taxed as a corporation, check the "Limited Liability Company" box and in the space provided enter "C" for C corporation or "S" for S corporation. If it is a single-member LLC that is a disregarded entity, do not check the "Limited Liability Company" box; instead check the first box in line 3 "Individual/sole proprietor or single-member LLC."

#### Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space in line 4 any code(s) that may apply to you.

#### Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1094-MISC

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1-An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
  - 2-The United States or any of its agencies or instrumentalities
- $3-\!A$  state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- $4-\!\mbox{A}$  foreign government or any of its political subdivisions, agencies, or instrumentalities
  - 5-A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- $7\!-\!\mathrm{A}$  futures commission merchant registered with the Commodity Futures Trading Commission
  - 8-A real estate investment trust
- $9-\mbox{An}$  entity registered at all times during the tax year under the Investment Company Act of 1940
  - 10-A common trust fund operated by a bank under section 584(a)
  - 11-A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
  - 13-A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for	THEN the payment is exempt for
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 <sup>1</sup>	Generally, exempt payees 1 through 5 <sup>2</sup>
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

<sup>&</sup>lt;sup>1</sup>See Form 1099-MISC, Miscellaneous Income, and its instructions.

<sup>2</sup> However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

- A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)
- B-The United States or any of its agencies or instrumentalities
- C-A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)
- E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)
- F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state
  - G—A real estate investment trust
- H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940
- I-A common trust fund as defined in section 584(a)
- J-A bank as defined in section 581
- K-A broker
- L-A trust exempt from tax under section 664 or described in section 4947(a)(1)
- M-A tax exempt trust under a section 403(b) plan or section 457(g) plan

**Note.** You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

#### Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns.

#### Line 6

Enter your city, state, and ZIP code.

#### Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN. However, the IRS prefers that you use your SSN.

If you are a single-member LLC that is disregarded as an entity separate from its owner (see *Limited Liability Company (LLC)* on this page), enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

**Note.** See the chart on page 4 for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at <a href="https://www.ssa.gov">www.ssa.gov</a>. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at <a href="https://www.irs.gov/businesses">www.irs.gov/businesses</a> and clicking on Employer Identification Number (EIN) under Starting a Business. You can get Forms W-7 and SS-4 from the IRS by visiting IRS.gov or by calling 1-800-TAX-FORM (1-800-829-3676).

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

**Note.** Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

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#### Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if items 1, 4, or 5 below indicate otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see Exempt payee code earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below

- 1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.
- 2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.
- 3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification
- 4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).
- 5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

#### What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:		
Individual     Two or more individuals (joint account)	The individual The actual owner of the account or, if combined funds, the first individual on the account'		
Custodian account of a minor (Uniform Gift to Minors Act)	The minor <sup>2</sup>		
a. The usual revocable savings trust (grantor is also trustee)     b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee¹ The actual owner¹		
<ol><li>Sole proprietorship or disregarded entity owned by an individual</li></ol>	The owner <sup>3</sup>		
6. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i) (A))	The grantor*		
For this type of account:	Give name and EIN of:		
7. Disregarded entity not owned by an individual	The owner		
8. A valid trust, estate, or pension trust	Legal entity⁴		
Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation		
Association, club, religious, charitable, educational, or other tax- exempt organization	The organization		
11. Partnership or multi-member LLC	The partnership		
12. A broker or registered nominee	The broker or nominee		
13. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity		
<ol> <li>Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i) (B))</li> </ol>	The trust		

List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see Special rules for partnerships on page 2. \*Note. Grantor also must provide a Form W-9 to trustee of trust.

Note. If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

#### **Secure Your Tax Records from Identity Theft**

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- · Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039

For more information, see Publication 4535, Identity Theft Prevention and Victim

Victims of identity theft who are experiencing economic harm or a system problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at: spam@uce.gov or contact them at www.ftc.gov/idtheft or 1-877-IDTHEFT (1-877-438-4338).

Visit IRS.gov to learn more about identity theft and how to reduce your risk.

#### **Privacy Act Notice**

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

Circle the minor's name and furnish the minor's SSN.

#### **Mental Health First Aid Colorado**

#### **OBH Registration Form**

First Name:				
Last Name:				
Email:				
Gender:				
Race/Ethnicity:				
Zip Code:				
I am attending this	training as a me	mber of the follo	wing population	:
Faith based com	munity			
First responder				
Law enforcemen	t			
Military active du	uty or retired pe	rsonnel		
Rural or frontier	county			
Pre-Survey:				
If someone I know appropriately.	needed help for	mental or emoti	onal health, I wo	uld feel confident responding
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I know how to reco	gnize the signs o	of someone poter	ntially experienci	ng a mental health challenge o
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I know how to asse	ss and respond	to someone havir	ng a mental healt	ch challenge or crisis.
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree

#### Mental Health First Aid Colorado

#### **OBH Post Survey**

Please complete the following survey:

•	J	•			
If someone I know needed help for mental or emotional health, I would feel confident responding appropriately.					
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	
I know how to recogn	nize the signs o	of someone poten	itially experiencii	ng a mental health challenge or	
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	
I know how to assess	s and respond	to someone havin	g a mental healt	h challenge or crisis.	
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	
I am attending this trFaith based commFirst responderLaw enforcement	-	mber of the follo	wing population:		
Military active duty or retired personnel					
Rural or frontier county					
Zip Code:					
Please provide any comments about the class below:					





#### **MHFA Certification Course**

By signing below, participant acknowledges that information will be shared with the Colorado Behavioral Healthcare Council so that funding may be made available for costs incurred by the Instructors and sponsors of this Mental Health First Aid course. The Colorado Behavioral Healthcare Council will protect the confidentiality of this information. This information will not be shared publicly and only included in records available for State or federal government audit. You may opt-in below to receive future emails from the Colorado Behavioral Healthcare Council related to events and promotion for Mental Health First Aid.

Date: Instructor(s):	
----------------------	--

#	First Name	Last Name	Email	Receive emails for Mental Health First Aid in CO? (Y/N)	Signature
1		20011101110	<u> </u>		o.g.i.utu.c
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					





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	-		
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23			
24			
25			





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	events and promotion for mental meath movemen					
26						
27						
28						
29						
30						
31						
32						
33						
34						
35						

What funding resources are available to support my class? ls it... AN YOUTH **ADULT** CLASS? CLASS? Is the class in a school Is the class a setting, or for a schoolspecialty module? based audience? Yes Yes Which one? Is the class for the Rural general community? Spanish Veterans No Yes Public Safety Is the class for people who work with Higher Education under-served or Older Adults at-risk youth? Is the class for Yes No people who are under-served or at-risk? You should seek, institutional or other independent funding sources, or apply for a You should apply for grant to support your funding via MHFACO's class. Office of Behavioral Health Reimbusement Program. You should apply for funding Contact Rachel Clements via Project AWARE at the at Colorado Department of rclementsemhfaco.org Education. Contact Michael Chevrier at Chevrier\_Mecde.state.co.us

### Sample Participant Reminder Email:

A reminder email (48 to 24 hours before the start of class) should include date, location, start time, a weather cancellation policy if applicable, and contact information for the host site.

Hi there!

I'm just writing to remind you that you are signed up to attend a Mental Health First Aid class tomorrow at Mental Health Center of Denver. The class will take place at the Recovery Center (4455 E. 12<sup>th</sup> St, Denver) and begins promptly at 8 AM. Your instructors, Kim and Kim, are looking forward to the class!

We are not anticipating any weather-related difficulties. However, because multiple large trainings are taking place at the Recovery Center tomorrow, we strongly advise you to arrive early in order to find parking!

See you tomorrow!

Best,
Marina
(207) 521 4897
marina.dimarco@mhcd.org

Reminding your participants about course details greatly increases the likelihood that they will attend! Most classes see a 10-25% "no-show" rate for community members.

### Instructor Guide & Course Timeline

This guide contains information crucial to your success in planning and teaching your course, outlines roles and responsibilities, and connects you with the appropriate supports and resources.

<b>/</b> ]	<b>FASK</b>	WHEN	WHO
1	Log into MHFA CO Instructor portal	2 weeks after	MHFA CO staff will
		instructor	send log-in info
		training	
1	Log into MHFA USA – National Council Instructor	2-4 weeks after	MHFA USA staff
ľ	<u>portal</u>	instructor	will send log-in info
		training	
	Confirm training details(location, dates, times, per	8+ weeks before	
_	participant cost, etc.)	course	Organization
_	Find a Co-Trainer—with 4-6 weeks' notice, MHFA	6-8weeks before	Instructor / MHFA
	CO staff can help connect you with a trainer near you	course	CO staff
	Submit course to MHFA CO through instructor	6+ weeks before	Instructor
_	portal	course	
	Submit course to MHFA USA through instructor	6+ weeks before	Instructor
	portal	course	
	Utilize the marketing and communications materials	6+ weeks before	Instructor
	o promote your course (provided on the MHFA CO	course	
_	nstructor site under Resources)		
	Order participant manuals on the MHFA USA	3+ weeks before	Instructor
	website	course	
╽	Review the <b>course roster</b> sent by MHFA CO staff	2 days before	MHFA CO staff send
		course	1 week, 1 day prior
		2-3 days prior to	Instructor
		course	
	Print copies of Adult or Youth MHFA handouts and	1+ week prior to	Instructor
٤	gather necessary supplies for training (see checklist)	course	
	Collect instructor evaluations from participants	Day of the	Instructor
		training	
Į	Use MHFA CO Sign-In sheet to capture participants	Day of the	Instructor
		training	
5	Send follow up email to course participants	1-3 days after	Instructor
	• •	training	
	Enter evaluation data in the MHFA USA instructor	Within 2 weeks	Instructor
	portal	of training	
_ ,	Mail reimbursement form to MHFA CO(if eligible	Within 2 weeks	Instructor
	For current funding opportunities)	of training	
ئلـــــــــــــــــــــــــــــــــــــ	opportunition)	or duning	



Si no sabe por dónde empezar a buscar ayuda para problemas mentales, abuso de sustancias o problemas emocionales, llame a Colorado Crisis Services. Ya sea que llame para usted o para un conocido, le ofreceremos ayuda professional confidential e inmediata. También le ofreceremos información, referidos y conexiones para más asistencia y soluciones.

- 24 horas al día, 7 días de la semana y 365 días al año
- A nivel estatal
- Intervención inmediata en crisis

1-844-493-TALK (8255) www.ColoradoCrisisServices.org



# COLORADO CRISIS SERVICES

### LÍNEA DE APOYO PARA CRISIS

El1-844-493-TALK (8255) es una línea de apoyo que trabaja 24 horas al día, 7 días de la semana, los 365 días al año para asistir a cualquier persona que se vea afectada por problemas mentales, abuso de sustancias o crisis emocionales. Todas las llamadas son atendidas por professional de salud mental, que ofrecerá apoyo inmediato y lo conectará con más recursos.

#### CENTROS DE CRISIS DE ATENCIÓN SIN CITA PREVIA

En nuestros centros de atención sin cita previa, abiertos las 24 horas del día, los 7 días de la semana, ofrecemos apoyo en momentos de crisis, información y referidos a todo aquel que lo necesite y de forma confidencial. No dude en visitor un centro cercano a usted si necesita asistencia o está ayudando a una persona en crisis. Algunos de los centros ofrecen camas en casos de crisis por 1-5 días, ya sea para tratamiento voluntario o involuntario. Viste www.ColoradoCrisisServices.org para conocer las ubicaciones de nuestros centros de atención sin cita previa.

### UBICACIÓN DE LOS CENTROS DE ATENCIÓN SIN CITA PREVIA



En asociación con
Arapahoe/Douglas Mental Health Network
Aurora Mental Health Center
Community Reach Center
Jefferson Center for Mental Health
Mental Health Center of Denver
Mental Health Partners



If you don't know where to begin finding help for a mental health, substance use or emotional issue, call Colorado Crisis Services. Whether the call is for you or someone you know, we'll provide confidential and immediate professional help. We'll also provide information, referrals and connections to further support and solutions.

- 24/7/365
- Statewide
- Immediate Crisis Intervention

1-844-493-TALK (8255) www.ColoradoCrisisServices.org



# COLORADO CRISIS SERVICES

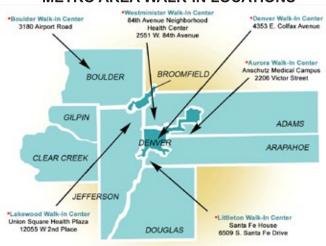
### CRISIS SUPPORT LINE

1-844-493-TALK (8255) is a 24/7/365 support line for anyone affected by a mental health, substance use or emotional crisis. All calls are connected to a mental health professional, who will provide immediate support, as well as connections to further resources.

#### CRISIS WALK-IN CENTERS

Our walk-in centers are open 24/7, and offer confidential in-person crisis support, information and referrals to anyone in need. If you need assistance or are helping others with a crisis you can always go to a walk-in center near you. Some locations provide crisis beds for 1-5 days, for either voluntary or involuntary treatment. Visit www.ColoradoCrisisServices.org to view our walk-in center locations.

#### METRO AREA WALK-IN LOCATIONS



Partnering with:
AllHealth Network
Aurora Mental Health Center
Community Reach Center
Jefferson Center for Mental Health
Mental Health Center of Denver
Mental Health Partners

## **Quick Reference Guide**

### for Behavioral Health Crisis Access

### **Community Crisis Connection and Colorado Crisis Services Working Together:**

Community Crisis Connection is part of Colorado's statewide crisis system - "Colorado Crisis Services" - which makes behavioral health crisis care accessible for Coloradans of all ages. This system includes the statewide Colorado Crisis Support Line and the following programs delivered by Community Crisis Connection in the metro Denver/Boulder region:

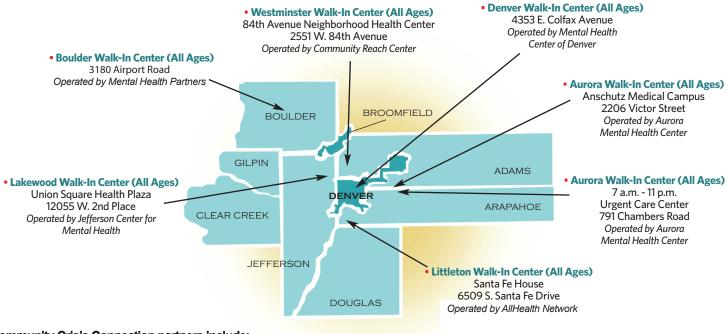
- Walk-In Crisis Centers: Located across metro Denver/Boulder for anyone experiencing a behavioral health crisis.
- Crisis Stabilization Units: Combine walk-in availability with short-term respite or residential treatment if needed.
- *Mobile Crisis:* Crisis counselors can travel throughout all nine counties in the metro Denver/Boulder region. Colorado Crisis Support Line staff are responsible for dispatching these teams when warranted.

All services are available 24 hours/day, 7 days/week, 365 days/year. Types of services include:

- Behavioral Health Triage & Substance Use Screening
- Immediate Crisis Intervention and De-Escalation
- Follow-up Crisis Services when needed: Clinical and/or psychiatric assessments, ongoing de-escalation and crisis interventions, medication evaluation, peer support services, and case management services.
- Disposition/Referral: Safety planning, referral to other providers, and support for involved family and significant others.

#### **How to Access Colorado Crisis Services Programs:**

- By Phone: Call Colorado Crisis Support Line: 1-844-493-TALK (8255) available 24/7/365
- Walk-in/Referral: Individuals and families in crisis are welcome and encouraged to walk in. Any community member can refer another person to any of our locations.



### Community Crisis Connection partners include: Community Crisis Connection partners include:

- Mental Health Partners (Boulder and Broomfield Counties)
- Jefferson Center for Mental Health (Jefferson, Clear Creek and Gilpin Counties)
- Community Reach Center (Adams County except Aurora)
- Mental Health Center of Denver (Denver City and County)
- Aurora Mental Health Center (City of Aurora)
- AllHealth Network (Arapahoe and Douglas Counties except Aurora)

**Call Colorado Crisis Support 24/7/365 at 1-844-493-TALK (8255)** 







You know how to help an older adult friend or family member manage their physical health: the same way you manage your own. Do you know how to help with lingering sadness, substance use, or anxiety?



An older adult can be at risk for a mental health challenge. In a Mental Health First Aid class, you'll learn the signs and symptoms of common mental illnesses, what to do in an emergency, and where to turn for help.

Learn more and register for a class at www.mhfaco.org.

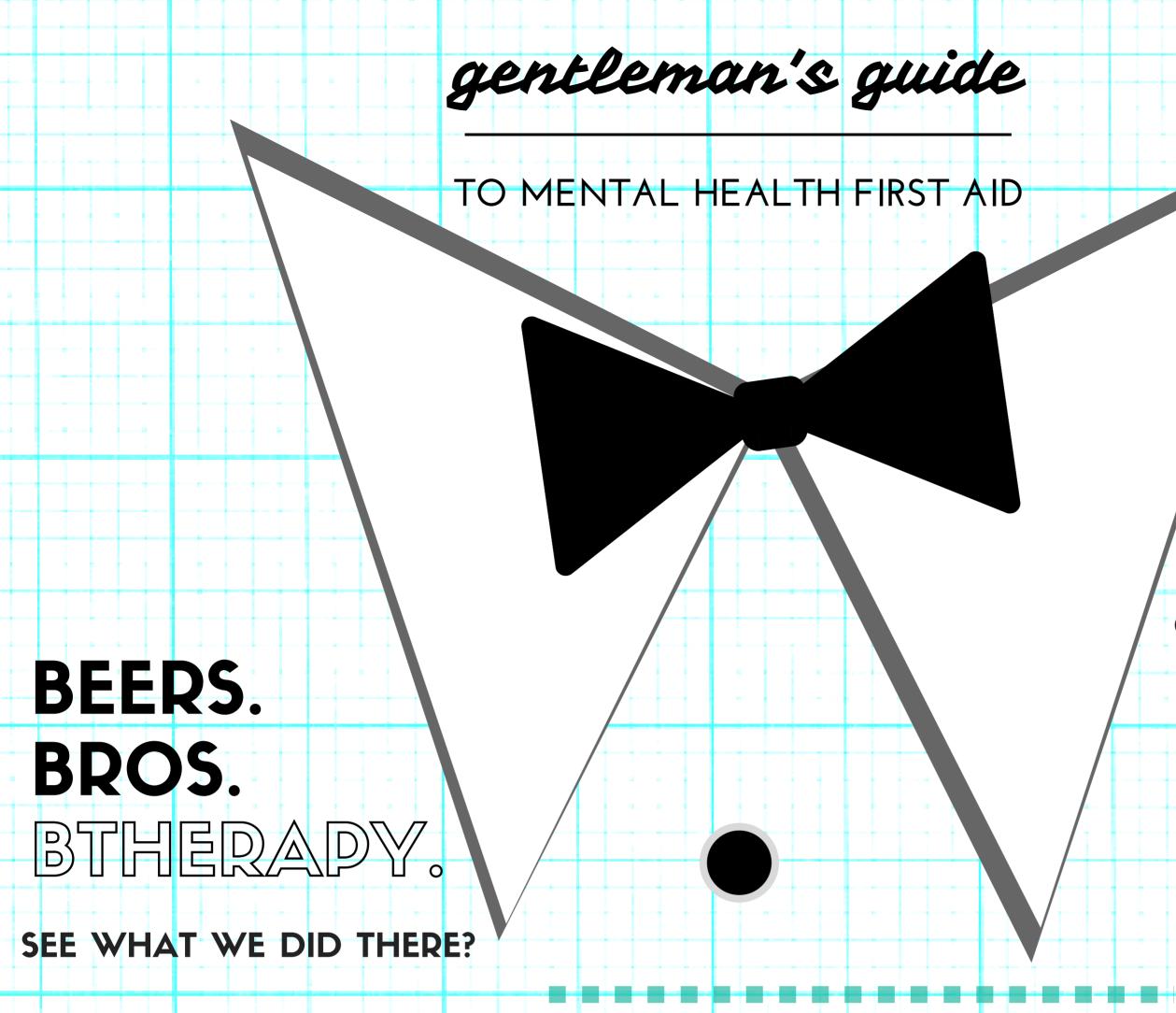




# WE'RE ALL WE'VE GOT.

Mental healthcare providers are few and far between in rural Colorado. It's up to us to learn how to keep an eye out for early signs and symptoms of a mental health challenge or crisis.

You can learn to take care of your friends and neighbors in an emergency. Sign up for a Mental Health First Aid class today: www.mhfaco.org/findclass registration@mhfaco.org



Truth: males
are less likely
to access
mental
healthcare
when they
need it.

THE POINT IS:

Dude brains are not that different from regular brains: they need the same care + attention as everybody else's.

Men of any age can be affected by a mental health challenge.

However,
mental
disorders
don't always
present the
way you'd
expect, and
many men
keep their
symptoms to
themselves.

**SO:** 

A Mental
Health First
Aid class can
teach you
how to look
out for signs
and
symptoms in
the guys you
love.

Be prepared!
Sign up
for a class
today.



www.mhfaco.org/findclass





Mental Health First Aid training can help you figure out how to take care of yourself and those you love when things get tough.

Register:www.mhfaco.org/findclass

### ONLY YOU

AND LITERALLY
EVERYONE YOU KNOW

# CAN PREVENT MENTAL HEALTH CRISES

**NEXT CLASS:** 

10%

OF EATING DISORDER
PATIENTS ARE MALE

75%

OF DEATHS BY SUICIDE ARE MALES

100%

OF CARING FRIENDS AND COWORKERS CAN LEARN HOW TO HELP

www.mhfaco.org/findclass



MENTAL HEALTH FIRST AID.

because

# STRONG

and

# SILENT

aren't the same.

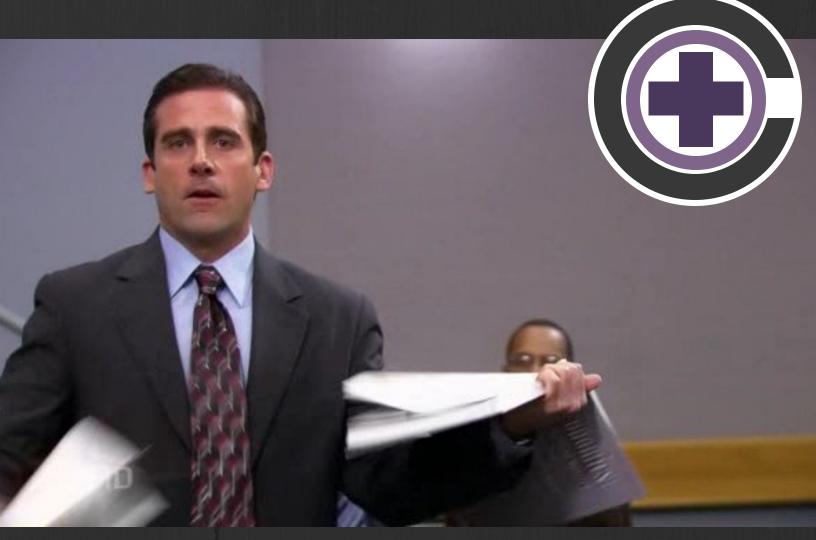
Too many veterans don't survive coming home. Help break down the stigma about mental health among military veterans and their families. Become a Mental Health First Aider to learn how to identify the signs and symptoms of mental illness, how to manage a crisis, and where to get help.

Learn more: www.mhfaco.org/findclass



### MENTAL HEALTH FIRST AID

Because mental health happens at the office.





Mental health challenges among employees cost billions each year in lost productivity, and contribute to almost half of employee turnover.

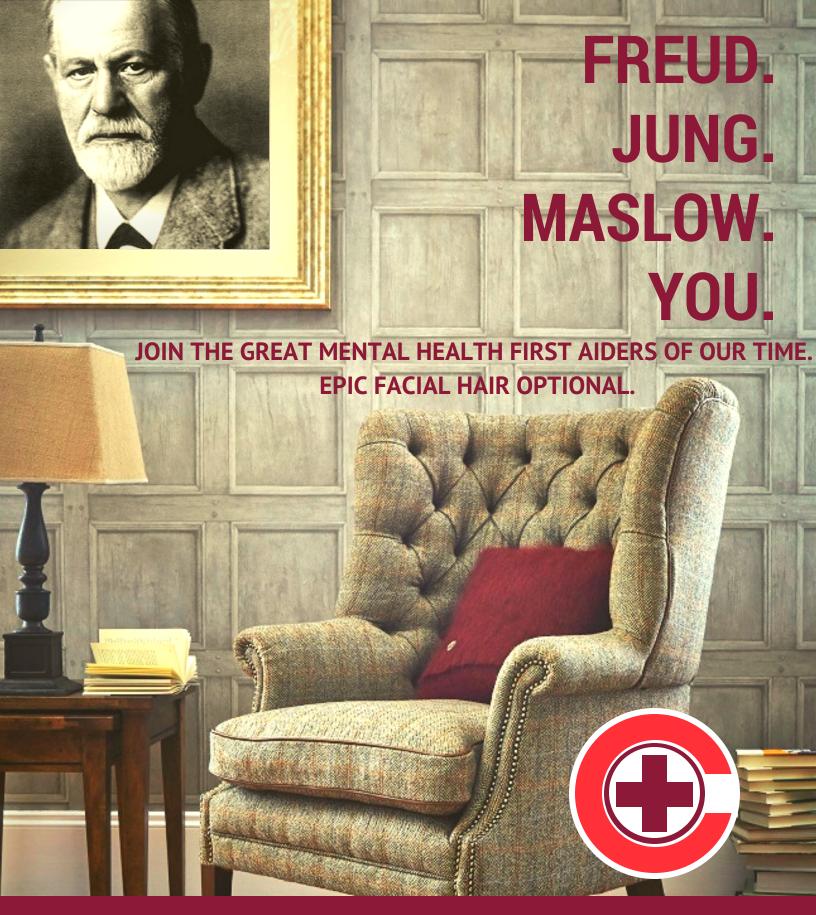
Learn the signs and symptoms of a mental illness, what resources are available, and how to help in a crisis.





Find a class for yourself or your organization today:

www.mhfaco.org/findclass



Mental Health First Aid won't make you a therapist. But it will teach you how to identify signs of mental health challenges, what to do, and where to turn for help.

Register for a class today and learn to support your friends and co-workers:

www.mhfaco.org/findclass

### **MENTAL HEALTH FIRST AID**

**BECAUSE SERVICE HAS NO BOUNDARIES** 



Learn the signs and symptoms of a mental illness, how to help someone in crisis, and what resources are available in your area.

Next class: Friday, July 7, 8AM-5PM Pueblo Police Department 200 S Main Street, Pueblo, CO 81003

> **Contact:** Cpl. Shelli Ellis 719-553-2475

# YOUR COMMUNITY SAFE.



Register: www.mhfaco.org/findclass

# MENTAL HEALTH FIRST AID + LAW ENFORCEMENT:

Keeping your team and your community safe is hard work, and Mental Health First Aid can help. With a specific module for public safety officers and first responders, MHFA is specifically designed to teach officers how to recognize and respond to a person with a mental health challenge. This training helps improve law enforcement response to mental illness, improve officer wellness and safety, build trust in the community, and keep people with mental illness out of jail.

"ROUGHLY 30% OF THOSE
IN OUR JAILS AT ANY
TIME SELF-REPORT
SYMPTOMS OF A MENTAL
HEALTH CONDITION."

- BOULDER COUNTY
SHERIFF JOE PELLE



### MHFA + CIT

Mental Health First Aid and CIT training are both part of the One Mind Pledge for law enforcement agencies, and they are designed to work together. MHFA is perfect for officers who haven't been trained in CIT, or as a refresher for the skills learned in CIT training. Plus, MHFA is POST approved for 8 hours of mental health or de-escalation training.

WWW.MHFACO.ORG



**MAY + JUNE 2017** 

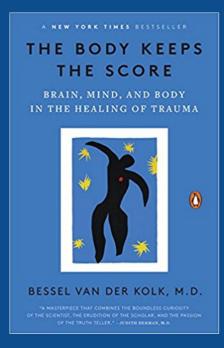


### SCHOOL'S OUT!

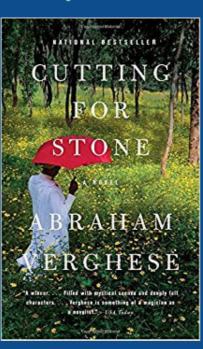
School's out for the summer, and there's no better time to reinvigorate your Mental Health First Aid teaching practice. That's why this newsletter is completely dedicated to resources for our amazing instructor community, including an updated Best Practices Manual, a new Classroom Management Guide, and a special invitation to some exclusive events where we can celebrate the hard, amazing, and impactful work you are doing all over the state. Enjoy!

The MHFACO Summer Reading List:

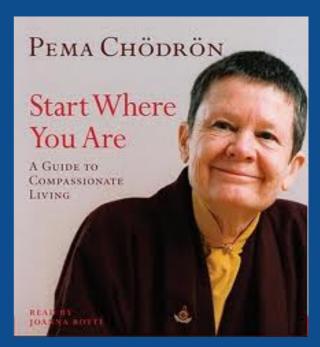
(send us what you're reading so we can have unrealistic expectations about how much we'll actually read)



Read it now. Read it again.



All the feels. Every. Single. Time.



Audiobook, anyone?



### **JUNE 9-10**

WEST END EMS CONFERENCE

First Responders! Nurta High School

### **JUNE 15**

CBHC NIGHT AT THE ROCKIES

Get tickets: www.rockies.com/CBHC

### **JUNE 30**

END OF OUR FISCAL YEAR

New year, new funding!
We'll share our report with you.

You're training lots of law enforcement! In case you missed it, here's a snapshot from a recent Boulder County Sheriff's Office training, hosted by Community Reach Center.





So many ALGEEs!
The entire
Commerce City
Rec Center staff
are trained, too!

Send us photos from your trainings so we can share them on social media! We're always here for you at algee@mhfaco.org.

Don't forget to check out changes to the Best Practices Guide (mostly, how to enter evaluations on the new instructor portal at www.mentalhealthfirstaid.org) and the new Classroom Management Guide for MHFA instructors (MHFACO exclusive).

We're looking forward to a long overdue, exciting development next month!

Stay tuned!

Love,
The MHFACO Team

P.S. The changing of the guard (AmeriCorps) is coming up, and we'll introduce our new team members soon. Keep in mind you'll want to send your requests, questions, love letters, etc. to algee@mhfaco.org instead of to Marina's and Pooja's MHFACO addresses.