

**MG&A**

**DISCOVERY**

**CERTIFICATION**

**HANDBOOK**

**2017**

**Marc Gold & Associates**  
**Discovery Certification Handbook**

## **Welcome**

Welcome to the Discovery Certification Process!

Now that you have completed the 3-day gateway training on Discovery and have decided to work toward certification, this handbook will describe the requirements for certification. The training that you will receive, the mentor who will guide you through this process and the resource materials you have been given will provide a wealth of information to support your quest for certification. This is a process based certification in that you will actually be performing the Discovery process while you learn. In order to successfully fulfill the requirements for certification you will have to complete Discovery activities, the written Profile documents, the Customized Plan for Employment and the Visual Resume to the satisfaction of the MG&A Mentor.

For Discovery Certification, the Coordinator will be Dr. Teresa Callahan of Ocean Springs, MS (teresacallahan1@gmail.com). Dr. Callahan has 40 years of experience in special education services as a classroom teacher, assistant principal, special education director and professor of special education at the university level. You will be assigned a personal mentor by Teresa after your registration form has been received and the registration period has ended. Your mentor will have 7 hours to mentor you through the Discovery process. Be sure to read and understand the information in each section of the handbook. If you have concerns or questions discuss them with your mentor.

The goal of Discovery certification is to develop skills in determining contributions, interests and conditions of a job seeker who experiences significant impact of a disability, using a qualitative, descriptive, non-evaluative process. Documenting these descriptions in a profile document, developing a customized plan for employment and creating a visual resume are also skills you will acquire.

You must negotiate with your supervisors at work for the release time necessary to complete the activities that are required. You must communicate with your employers to assure that funding is available to support employment opportunities that may be developed as a result of this process. You will need approximately 40 – 50 hours over the 20-week period.

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## Discovery Requirements

To be successful with certification, you will need to fulfill the following requirements to the satisfaction of the MG&A Mentor.

1. You will be required to identify a learning partner with an intellectual/developmental disability with whom you will facilitate the Discovery process, write the Profile documents complete the Customized Plan for Employment, and build the Visual Resume. This person and his/her family must be voluntarily willing to allow you to facilitate Discovery and to give you permission to talk to others about his/her life, take digital photos and/or videos and to share your Discovery notes, photos and Profiles with your MG&A Mentor for purposes of your certification. When you decide to pursue certification, you should immediately begin seeking a learning partner. MG&A recommends that you have a “back-up” learning partner in case your initial learning partner decides not to participate. Please check with your learning partner’s agency for a required release of information forms so that information can be shared with your MG&A Mentor.
2. You will be required to complete the following forms.
  - a. Discovery Signature Page – a form stating that you have read the handbook and agree with the conditions for certification.
  - b. Agreement to use MG&A Webinar Series – a form giving you permission to view the webinars. This form is emailed to MG&A (marcgoldassociates@gmail.com).
3. You are required to watch 6 webinars, read the 3 Discovery manuals and all articles assigned. The Discovery: Charting the Course to Employment manual should be read first. Upon completion of the Discovery manual, begin the Profiles: Capturing the Information of Discovery manual. The Customized Plan for Employment manual can be read once you have finished the profile. The Customized Plan for Employment manual will guide you through the Customized Plan for Employment meeting.

Webinars titles and a suggested order of viewing are as follows. (Please note there is no Webinar #2.)

- 1 DJ Customized Employment: Overview
- #3 Discovery: Steps and Tools
- #4 Accounting for Discovery
- #5 Capturing Discovery
- #6 The Profile Format  
The Customized Plan for Employment

Your mentor will question you on the webinars.

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4. Your mentor will ask you to provide a proposed schedule of activities for Discovery and your plans for completing Discovery. The total time spent in the Discovery activities will range from 20 - 40 hours. This schedule will serve as a guide for you and help you meet your deadlines. It is common for adjustments to be made due to inclement weather, family emergencies, etc. So, don't panic if you have to tweak this schedule. You can use the Activity Log as the guide for your proposed schedule.
5. Hold an initial meeting of Discovery with the learning partner and selected supporters to kick off the process and to explain in depth, the details and expectations. Your time spent on the initial meeting should be recorded in 1A of the Activity Log.
6. Scope out the neighborhood of the learning partner, describing relevant features as described in the manual and Profile guide. Take notes of these features.
7. Conduct an initial visit to the home of your learning partner. During this initial visit, you will be starting the Discovery process. This initial visit should not last any longer than 1 hour. Your time on this initial activity should be recorded in 1B of the Activity Log and notes must be taken.
8. Re-visit the learning partner's home for 2 – 4 additional visits to collect the information required for the profile. Make sure to review the sections of the profile to insure you are documenting and observing all required components. These visits include your observations of the neighborhood and surrounding businesses, available transportation, etc. Your time on these visits to the home and neighborhood will be recorded in Section 1B of the Activity Log and notes must be taken.
9. Interview a balance of people who are friends and people who are paid to provide services to the learning partner. Interview the people who know the learning partner best and most positively. You will need to interview each of these identified people two or three times to have enough information and descriptive notes. These visits will be recorded in Section 1C of the Activity Log and notes must be taken.
10. Observe the learning partner 4-8 times in typical life activities. These visits will be recorded in Section 1D of the Activity Log and notes must be taken.
11. Participate with your learning partner as a colleague in activities of typical life for the individual. This will include spending time in familiar places doing things the participant routinely does. These times will be recorded in Section 1E of the Activity Log and notes must be taken.

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12. Towards the end of Discovery, observe or participate with, as appropriate, the learning partner in a community activity in which they are most familiar, most competent and most comfortable. Consider visiting the site of the activity prior to this experience to understand the expectations for successful participation, the steps for performing the activity and subtleties such as proper dress, behavior, etc. At least one of these activities is required and no more than two should be performed. These activities are recorded in Section 1F of the Activity Log and detailed notes must be taken.
13. After completing a familiar activity, observe or participate with, as appropriate, the learning partner in a community activity which is novel to the learning partner but which otherwise is consistent with their interests and conditions for success. Make sure to get suggestions from family members on these activities. At least one novel activity is required and no more than two novel activities should be performed. These activities are recorded in Section 1F of the Activity Log and detailed notes must be taken.
14. Review permanent records (school, Vocational Rehabilitation, etc.). Note challenges, solutions, patterns and optimistic staff. Consider interviewing staff with optimistic comments. Time spent on these activities will be recorded in Section 1G of your Activity Log and summary notes must be taken.
15. Submit your Activity Log. The mentor will ask for your log at checkpoints throughout the process. Make sure you update your log as you progress through the activities. The MG&A Certification for Discovery Activity Log is the required format. Since you will submit this log through scanning or fax, please use dark ink when completing the logs. You will find the Activity Log at Marc Gold's website and a digital copy will be provided by your mentor. *Please remember to account for travel and Discovery activities separately.*
16. Submit representative copies of your Discovery notes. There is no required format for your Discovery notes but we strongly recommend that you take notes in a descriptive and narrative format whenever possible. The purpose of submitting copies of your notes is for the mentor to guide you in becoming more descriptive and staying away from evaluative terms. Once the mentor is comfortable with your note taking skills, the mentor may determine that he/she no longer needs you to submit Discovery notes.

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17. Collect digital photos and/or “short-burst” videos you have made of your learning partner during the Discovery process. Before taking photos, make certain you have a signed release for taking photos/videos. Your agency can provide you with these release forms. These photos will serve as your photo library from which you will develop the visual resume for your learning partner. You will need one photo in which your learning partner poses for the picture—one that is respectful. All other photos should provide imagery that shows competent performance in work experiences, home responsibilities and community involvement. Be sure to include photos that capture specific skills and interests. With the exception of the one photo that will introduce your learning partner, photos should not be posed “photo ops”. Make sure your learning partner is looking at the task he/she is performing and not looking at the camera. Be careful with videos. While videos of activities can be very powerful and helpful in describing your learning partner, uploading long videos can be problematic. Aim for short bursts of videos.
18. Submission of Part 1 of the profile. The 2014 MG&A form is the required form to complete. You will go to the [Marc Gold's website](#), for all required forms. Your time spent on this requirement will be documented in Section 1B of the Activity Log.
19. Submission of Part 2 of the profile. You are required to **submit one section at a time of Part 2**. Select one portion of Part 2 to write. Once you complete the selected portion, submit that portion to your mentor. Your mentor will critique the submitted section and make recommendations for changes, rewording, etc. Completing a section at a time keeps Part 2 from becoming too overwhelming for you. Again, the MG&A 2014 form is the required form to use. You must not proceed to Part 3 of the profile until your mentor has approved every section of Part 2. Part 2 of the Profile is the heart of the Discovery process and is the most challenging part to write. Make sure you review the guide and the sample for Part 2. These two resources are a tremendous aid for you. Your time spent on Part 2 of the profile will be documented in #2 of the Activity Log.
20. Submission of Part 3 of the profile. Make sure to use the 2014 MG&A form. Part 3 can be completed in bulleted form, with the exception of the Challenges section. The Challenges section must be written in narrative form. You will find that Part 3 progresses much more quickly than Part 2. Remember to review your guide and sample of Part 3. Your time spent on this activity will be documented in Section #2 of the Activity Log. Upon receiving approval of your completed Part 3, you may begin the Customized Plan for Employment.

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21. Set up and facilitate a Customized Plan for Employment Meeting (CPE) for your learning partner following the guidelines in The Customized Plan for Employment manual and as directed by your MG&A mentor. Record the facilitator's role and submit both the video and completed Customized Plan for Employment worksheet to your MG&A mentor for approval. You are required to submit video portions of the CPE meeting. The following components are required to be videoed and submitted to your mentor:
  - 1 minute of the introduction
  - 1 minute of What Works/What Doesn't Work activity
  - 1 minute of the discussion of Characteristics of an Ideal Job
  - 1 minute of Types of Job Tasks activity
  - 1 minute of the Specific Employer List activity

You will find the Customized Plan for Employment worksheet on the Marc Gold website. There is also a worksheet sample for you to review. Your time spent on this activity will be documented in Section #3 of the Activity Log.

MG&A has prepared step by step videos on how to set up your Dropbox, make a video, edit and upload your videos to a Dropbox.

Dropbox [How to Setup and Use a Dropbox](#)

Recording and Editing Videos Part 1 [Video on Recording and Editing Videos Part 1](#)

Recording and Editing Videos Part 2 [Video on Recording and Editing Videos Part 2](#)

How to Upload Videos [Video on How to upload videos.](#)

22. Develop a Visual Resume that can be used to represent your learning partner to potential employers and submit a digital copy to your MG&A mentor for approval. Your time spent on this activity will be documented in #4 of the Activity Log. See #21 for information on how to upload to Dropbox.
23. Pass a content test with a minimum of 70 % accuracy. You will have three opportunities to achieve this accuracy level.

## Grading Guidelines

Our mentors use the sample profile in the Profiles: Capturing the Information of Discovery manual as a baseline for acceptable quality. The Grading Rubric located in the Appendices is used by mentors to document unacceptable, acceptable or outstanding progress. MG&A strives to push participants beyond the acceptable standard into the outstanding standard. The Discovery process is an evolving process—the more Discovery you do, the better you become. It is a continual growth process. Potential mentors for your state are identified on the basis of outstanding performance

Our mission is to guide you to be successful with the Discovery certification process and maintain MG&A standards. When you seek re-certification in three years, MG&A will expect to see growth/improvement in your Discovery process—not just maintaining the basic acceptable standard.

It is expected that you will receive different feedback from your mentor than some of your colleagues receive from their mentors. Different feedback is not contradictory--it is based on your learning partner's circumstances, your skill level and MG&A's desire to push participants into the outstanding standard. If you begin to feel overwhelmed or uncertain about your success in the process, please do not hesitate to talk to your mentor or coordinator.

## Responsibilities of the Person Seeking Certification

It is your responsibility to read all documents given to you, including the Discovery Certification Handbook, and watch all webinars. You should respond to any emails your mentor sends to you. You should participate in all conference calls set up by your mentor.

## Timeline for Certification

Please be aware that MG&A fully expects participants to complete the certification process within the 20-week timeline. MG&A does recognize that family/health issues do occur. MG&A has developed the following policies with regard to extending timelines for participants.

## Delayed Start

When a mentor has made the first contact with you, you are expected to already have identified a learning partner. However, if you do not have a learning partner, we will give you a two-week window to locate a learning partner. After that, MG&A will place you on hold until you have a learning partner--it is then your responsibility to let MG&A know when you have a learning partner. When you do contact MG&A, MG&A will then determine whether to grant permission for you to move forward. In no case, will permission be granted to continue if you have been on hold for six months or longer. Depending on the original mentor's schedule and work load, you may or may not have the same original mentor.

## Extensions

If it becomes apparent to the mentor that you will not meet the 20 weeks' deadline or if you are unable to meet the quality standards expected, the mentor will make a decision based on the following MG&A timeline extension policies.

1. Reasonable exceptions to the timeline are: medical emergencies, family emergencies, health issues and issues with learning partners (moving, etc.) When the participant experience any of these situations, extensions can be given and no extension fee will be assessed. A new timeline will be established.
2. Supervisors at times will ask for extensions for the participant because of unanticipated work load increases. We certainly recognize these unanticipated issues and will grant extensions based on these exceptions. However, the agency will be required to pay a \$75.00 extension fee per participant.

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3. If you have been responsive during the process but have struggled and have begun to show a potential positive outcome and will need an extension to complete the process, an extension will be granted. However, you will be assessed a \$75.00 extension fee. If you have also used all 7 hours of mentoring, additional mentoring hours will have to be purchased separately from the extension fee.
4. If you have not been responding to mentor emails and haven't been turning in work in a timely manner and then find you cannot finish within the 20 weeks, an extension will not be given.

### Quality Performance

Participating in the certification process does not guarantee you will earn a certificate. You must meet MG&A standards as outlined in the Grading Rubric and determined by your mentor.

If it is apparent to your mentor at the completion of Part 2 of the Profile that you are not meeting the quality standards, your mentor may decide to discontinue your certification process at this point. If this occurs and you wish to start the process over, you must pay a new, lower fee for certification that pays for a mentor's time. If more than one year has elapsed from the time you attended the three-day gateway training, it will be necessary to start anew with a full payment for certification.

If you are still within the 20-week timeframe but have used the 7 hours of mentoring time provided in your fee and if the mentor believes you are making successful progress, you or your agency may be charged an additional mentoring fee of \$75/hour until you complete the process. MG&A monitors the mentoring time and will contact you and your agency should we see this become a possibility.

**The mentor will make these decisions based on MG&A's policy for extensions, your performance and your response to calls, emails, timelines and requested edits. The mentor will also include the Coordinator of the Discovery Certification, as well as your employment supervisor in reaching these decisions.**

Please sign the last page of this handbook and send to your mentor to indicate your understanding of the requirements of this certification and your responsibilities in meeting the requirements.

## Discovery Signature Page

Please Sign:

As an individual applying for certification in Discovery from Marc Gold & Associates, I have read and understand the requirements for certification and my responsibilities involved.

\_\_\_\_\_  
Printed Name of Individual

\_\_\_\_\_  
Individual's Agency

\_\_\_\_\_  
Signature of Individual

\_\_\_\_\_  
Date

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# APPENDICES

**Discovery Grading Rubric**

Participant's Name:

Group Code:

<b>Requirements and Timelines</b>	<b>Outstanding</b>	<b>Acceptable</b>	<b>Unacceptable</b>
Met all expected timelines as specified in handbook and emails			
Proposed schedule			
Discovery notes			
Submitted sections of Profile as requested			
Final submission of Part I on time			
Final submission of Part II on time			
Final submission of Part III on time			
Submission of CPE on time			
Submission of Visual Resume on time			
All Activity Logs			
Participated in phone conferences			
Responded to emails			
<b>Quality of Part 1 of Profile</b>			
Evidence that the participant toured the neighborhood and surrounding commercial areas			
All sections of Part 1 are complete with an absence of evaluative language and labels.			
<b>Quality of Part 2 of Profile</b>			
Final version of Part 2 is relatively free from evaluative language			
Final version of Part 2 is positive and optimistic			
Final version of Part 2 robustly describes performance			
Final version of Part 2 is robust in its descriptiveness and depth to allow for translation.			
Final version of Part 2 is professional and respectful			
Final version of Part 2 has evidence of novel and familiar activities			
Final version of Part 2 has evidence that the participant met the minimum number of required observations			

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Requirements and Timelines	Outstanding	Acceptable	Unacceptable
<b>Quality of Part 3 of Profile</b>			
While there may continue to be some minor confusion re: section to place information, the information is clear and consistent with the information in Part 2.			
Conditions, interests and contributions are captured			
Challenges, as well as, solutions for the challenges are described and the use of labels is avoided			
Information that is considered sensitive is described in the sensitive section			
Potential employers' list takes into account the job seeker's conditions for success and interests			
<b>Customized Plan for Employment</b>			
Video indicates participant spent time with the job seeker/family explaining purpose of meeting, and "trumps" concept			
Participant acted as the facilitator			
Participant completed all steps of the CPE			
Participant submitted video sections of the meeting			
<b>Visual Resume</b>			
Pictures are good quality and are respectful of the person			
Resume has a professional quality			
Highlights contributions of the job seeker			
Last slide has job tasks described			
<b>Test</b>			
Passed test with 70% accuracy: 1 <sup>st</sup> 2 <sup>nd</sup> 3 <sup>rd</sup> attempt			

## **TIPS FOR SUCCESSFUL COMPLETION OF DISCOVERY CERTIFICATION**

**Start early:** Begin to identify a learning partner when you submit your registration form for certification. Your learning partner should be someone who has an interest in obtaining employment. If your learning partner is school-age, expect to meet with the building principal and the Director of Special Education to gain entrée into the schools. We suggest you do this early in the process as you might have to undergo a background check.

**Discovery is a process:** Understand that Discovery is a process, and not just another service that is offered. To do effective Discovery and complete certification, you have to be invested in learning and understanding the process. Discovery seeks to understand who the person is and what the person does.

**Explain the Process:** Ensure that your learning partner and the family understand the process and will commit to the entire process. This assists in completion of certification in a timely manner and also avoids delays in having to identify a new learning partner mid-process and having to start over.

**Profile:** The information that we learn in Discovery is captured in the Profile. Please keep in mind that we want to use positive, person-first, and professional language in the Profile. The Profile is a document that helps us learn who the person is, what they do, and what supports are needed to assist the person in being successful. Keep in mind, the profile is not a plan. It is not a place for goals to be written or to identify areas the facilitator believes to need improvement.

**Pay attention to the webinars:** There is a lot of information in the webinars that is meant to help you understand and be prepared for the Discovery process.

**Write descriptively:** Avoid the use of evaluative and subjective words. Some words to avoid include: can, will, able, often, enjoys, likes, loves, etc. Writing descriptively can be challenging; however, your mentor will guide you through this process.

**Use action statements:** Rather than using evaluative and subjective words, write what you mean. Some examples may include:

*Tom mows the lawn with a push mower once a week, instead of,  
Tom can mow the lawn.*

*Jenny completes internet searches by using the mouse to click on the internet explorer button. She then types google.com in the search bar. Jenny then clicks on the search box and types skydiving videos. When the results appear on her screen, she clicks on the links to watch videos of skydiving. As Jenny watches the videos she smiles, giggles, and says “that looks like so much fun, I want to do that”, instead of, Jenny likes skydiving videos.*

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**Observation vs. Interviewing:** Observation and interviewing are both an important aspect of Discovery. It is important to talk to people who know the person best to gain insight from their perspective. It is also critically important to spend time observing the person actually doing activities. When writing descriptively, it should be apparent in the Profile what activities you have personally observed.

**Discovery Activity Log:** Your Discovery Activity Log is set up to outline all the tasks and activities that must be completed during Discovery. Please ensure that you are completing at least the minimum requirements in each section. Keep in mind that minimums are just that, minimums. If you feel you need more information about something, do another observation. Please complete your discovery Activity Log as you go through the process. Do not wait until the end to complete this document.

**Block out time:** Upon beginning the Discovery Certification Process, it may seem like 20 weeks is a lot of time to complete all the requirements of certification. The allotted time for completion is sufficient, however there will be other demands (work, life, etc.) that you experience while going through certification. If you don't specifically block out time to complete all your requirements, including time for writing and editing, you will soon find that you have not completed certification within the timeframe and will run the risk of not becoming certified. Also, keep in mind that your learning partner is someone who has expressed an interest in obtaining employment. You want to remain aware of the fact that how you spend your time will have an impact on this person.

**Use your mentor for support:** If you are unsure how to proceed or how to write something you've observed, contact your mentor to seek support.

**Edits:** Your mentor will provide you with edits for each section of the Profile. These edits may ask for more information. It is common for a mentor to ask "what does it look like". When writing the Profile, ask yourself "what does it look like" and then describe what you see your learning partner doing. This will save time in the editing process. Also, keep in mind that your mentor may point out areas where more description is needed. When a mentor does this, keep in mind that these things should be consistent throughout your Profile. Ensure that you are using descriptive language and capturing what your observations look like throughout. It is often helpful to follow-up with a phone conversation with your mentor after edits have been received.

**Photographs:** Take pictures throughout the Discovery process. Remember that you will be creating a visual resume as a part of certification. Taking photographs during the Discovery process not only prepares you for creating the visual resume, but also assists you in remembering what you observed. It can also be helpful to take short video clips. Please take time to ensure videos represent your learning partner in a respectful manner.

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**Visual Resume:** A picture says 1,000 words! Use pictures that show your learning partner performing tasks. Posed pictures should be avoided (the only posed picture should be the first picture that introduces the learning partner). Rather, focus on pictures that will assist an employer in seeing what your learning partner does and helps the potential employer understand how your learning partner would be a good fit for their business.

**Customized Plan for Employment (CPE):** While the CPE is one of the last steps in the certification process, you will want to begin to prepare for it early. At the CPE, you want to include anyone who is important to your learning partner. This may include: family members, friends, neighbors, people from church or community organizations, and paid staff. Begin the planning process at least 2-3 weeks prior to when you want the meeting to be held. Keep in mind that everyone is busy and that you will be coordinating multiple schedules for the CPE. At the CPE, keep things moving and keep the energy positive. One of the goals of the CPE is to create a plan that will lead to a customized job for your learning partner. Focus on strengths. It may be rare to have someone at the CPE who does not believe your learning partner can go to work, but it does happen at times. You want to keep control of the meeting by helping everyone understand that you are going to review the information learned in Discovery and together create a plan that will lead to work.

**Self-learning:** You are assigned a mentor for this process who will help keep you on track. Your mentor will establish timelines and due dates for assignments. It is up to you to stay focused and make sure you complete your work on time. Adult learning can be challenging if you don't prepare yourself and remain organized. Your mentor isn't responsible for reminding you of deadlines and following up to ensure your work is completed. Most mentors, however will check in to see how you are doing.

**Quality:** It is important for MG&A to maintain the integrity of the Discovery process. Candidates successfully completing certification have produced a quality and comprehensive Profile. Certification is based on a combination of completing all required tasks as well as quality content contained in the profile. Certification is not obtained solely by completing the required steps of Discovery. Your mentor will make all attempts possible to assist you in understanding the Discovery process and capturing information in a well-organized descriptive and meaningful manner. The completed Profile, Customized Plan for Employment and Visual Resume are all professional documents that will hopefully be read by friends, supporters and funders, such as rehabilitation counselors. It is vital that the writing be professional. Your mentor will be guiding you in this area. If you know your writing skills are not strong, partner with someone who does have strong writing skills and have them check your writing.

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**Translation:** Everything that we learn in Discovery is an act of translation. As you write descriptively, you want to keep in mind how the information you capture will translate in other sections of the Profile as well as in the potential workplace. Keep in mind this is why we want to ensure that we capture what our observations “look like” as this will provide the information needed to translate what it may look like in the world of work.

**Communication:** Respond to emails and participate in conference calls. You should always feel comfortable talking to your mentor about any issue that is impacting your progress, such as, confusion over content, illness, etc. Mentors are there to support and guide you.

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## Discovery Certification Task List

Requirement	Targeted Completion Date	Actual Completion date
Identify learning partner		
Sign Discovery Signature Page and send your mentor		
Sign the Agreement to use MG&A Webinar Series to view MG&A webinars and email marcgoldassociates@gmail.com or fax (228-205-4597)		
Read all 3 Discovery Series Manuals		
Watch all webinars – This will take approximately 8.5 hours to watch them all		
Schedule initial meeting with your learning partner		
Submit a descriptive summary of your initial meeting with learning partner, if requested by your mentor and review with mentor		
Submit draft of Profile Part 1		
Review edits with mentor		
Submit Part 1 with recommended edits made		
Submit discovery notes to mentor		
Submit drafts Profile Part 2 one section at a time and Discovery Activity Log completed to date		
Review edits with mentor		
Submit Part 2 with recommended edits made		
Receive approval of completed Part 2 and permission to begin Part 3		
Submit draft of Profile Part 3		
Review edits with mentor		
Submit Part 3 with recommended edits made		
Begin contacting people to schedule the CPE		

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Requirement	Targeted Completion Date	Actual Completion date
Conduct CPE: remember to video meeting		
Submit CPE worksheet and video to mentor		
Complete edits and submit CPE worksheet to mentor		
Complete Visual Resume		
Submit to mentor for editing		
Submit Visual Resume with recommended edits made		
Update Activity Log and submit to mentor		
Complete test with 70% accuracy		
Submit final email with all approved sections of the Profile, CPE meeting worksheet, Visual Resume, Test, and Discovery Activity Log		
Final Completion Date for Certification		