

# DSMP Plus Virtual Data Collection Checklist

Workshop Paperwork: Access Participant & Leader forms on the ILPTH Leader Resource Page.

Password: **leaders1!**

## Workshop Registration

Leaders

- Register workshop- Sign in to ILPTH to register workshop.
  - **Sign-In Link** is in the upper right-hand corner on the ILPTH website: <https://ilpathwaystohealth.org>
  - Navigate to the “Classes” tab and click “Add Class” to register the workshop.
  - Contact AgeOptions to add new locations.
  - Ensure any changes are updated on ILPTH (new dates, different leaders, canceled, etc.).
- Screen referrals and recruit participants- Discuss program and technical details. If needed, inform participants a technical assistant will contact them to practice before the 1<sup>st</sup> session.
- Register participants using your own registration process.
- Email or mail participant **Welcome Letter** with form links & virtual class link, **Zoom Instructions** (if applicable), and workshop ID. Mail participants workshop books/materials (including forms and envelopes if using paper forms).
  - Ensure participants send a copy of their ID and Insurance Cards.
  - Ensure participant or physician returns the completed **DSMES Order Form**.

## 1-2 Weeks Prior to Workshop Session 1

Leaders

- Monitor ILPTH for new participant self-registrations (Sign into ILPTH, navigate to “Classes,” search for your workshop, click “view” to see registered participants).
- Leaders and Technical Assistant (TA) practice.
- Email pre-workshop reminder with virtual class link and **Zoom instructions** (if applicable).

## Session 1- Individual Assessment (1-2 Weeks Prior to 1<sup>st</sup> Group Session)

Leaders

- If participant has returned the **Assessment/Pre-Survey**, provide the RD with the completed form.
  - If Assessment/Pre-Survey has not been received, RD completes the Assessment/Pre-Survey verbally by asking the participants the questions.
- Receive completed forms from RD after RD completes the assessment.
- No one** is permitted to join the workshop after Week 1 Assessment.

RD

- Explain evaluation forms to participants using the **Virtual Data Collection Script**.
- RD conducts Individual Assessment of each participant.
  - RD reviews assessment/pre-survey form and creates DSMP Plan and Smart Goal with participant using the **Intervention Tracking Form**.
  - If RD has not received the **Assessment/Pre-Survey**, RD completes it verbally.
- RD fills out and provides the participant with the **SMART Goal Participant Sheet**.
- Return the completed Intervention Tracking and Assessment forms to the leader.

## Session 2 (1<sup>st</sup> Group Session)

Leaders

- Group workshop Session 1 begins.
- Follow instructions for during/after each session (see next page).

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### During/ After Each Session

Leaders

- Complete attendance form. Please print legibly or fill in electronically.
- Fill in the [Intervention Tracking Form](#): session date, attendance, participant progress, outcomes, and initial form. Document any forms received.
- Email Action Plan reminder to participants 3 days post-session.
- Email workshop reminder the day before/morning of workshop with virtual class link.
- Contact participants who miss sessions or do not return for feedback.

### Session 7 (Last Group Session)

Leaders

- Verify that the attendance sheet is accurately completed.
- In the last 15 min of the session, participants complete the [Post-Survey](#).

### Session 8- Individual Follow-Up Session

RD

- RD creates [Participant Support Plan](#) collaboratively with each participant.
- Scan and make 2 copies of the completed Support Plan.
- Provide one copy of completed Support Plan to participant.
- Submit one copy of the Support Plan to your program coordinator, who will forward it to the participant's physician.

### After Last Session

Leaders

- Immediately after the last session concludes, enter participants, attendance, survey data and upload all legal documents to ILPTH OR send all paperwork to Joan Fox at AgeOptions: [joan.fox@ageoptions.org](mailto:joan.fox@ageoptions.org)
  - The [ILPTH User Guide](#) provides instructions for data entry.
  - If you input all data in ILPTH, email the Health Promotion Team at AgeOptions to confirm completion of the workshop. Ensure that you save the forms.
  - If you are an AgeOptions facilitator, you must send all paperwork to Joan.

P.C.

- Contact leader if you have not received the Participant Support Plan.
- Send the [Provider Follow-Up Letter](#) and a copy of the completed Participant Support Plan to the provider/physician.
  - Customize the Physician Cover Letter with your site contact info and logo.

### 3 Month Follow-Up

P.C.

- Mark your calendar for program follow-up.
- Navigate to the "Classes" tab, locate the workshop, and view participant contact info.
- Mail each participant the [Participant Follow-Up Letter](#) and [Follow-Up Survey](#).
- Once completed surveys are received, send to Joan Fox at AgeOptions: [joan.fox@ageoptions.org](mailto:joan.fox@ageoptions.org)
  - When emailing forms, send confidential.