

IL Pathways to Health

Leader Quick Reference for Caregiver Resource Specialists



Workshop Data Entry Process

1. Register Workshop
 - Leader registers workshop in ILPTH.
 - If there are any changes (new dates, different leaders, canceled, etc.) update the workshop in the database.
2. Participants Register
 - Participants can register using “Find Classes” on the ILPTH website.
 - Leaders have the ability to manually register participants.
3. Prior to and Start of Class
 - Leaders can view/manage class data in ILPTH and check for any new self-registered participants.
 - Leaders follow program specific data collection checklists- provide participants with participant registration packet and any required forms (surveys, etc.). Links to program specific forms can be found on the [leader resource page](#) on ILPTH. Password: leaders1!
4. After Last Session
 - After the last session, email attendance sheet, participant registration packets, and completed surveys to Wendy De Leon at AgeOptions: Wendy.DeLeon@ageoptions.org

Dashboard Navigation

- Classes Tab:** Manage classes you are leading or create a new class.
- Participants Tab:** Access participant PHI and contact info.
- Locations Tab:** View locations or create a new location.
- Class Leader Tab:** View your contact information and program certifications.

Login to your Leader Account

Login button is located at the top right-hand corner on ILPTH website. Enter your email address and the password. Once logged in, you will be taken back to the home page. Look up to the right-hand corner where you signed in, click on your name, and then click on “leader.” This will take you to the back end of the website.

Add a Class

- Click the “**classes**” tab. On the bottom of the page, click the green “add class” button. Fill in all required fields- class type, program, class leaders, workshop contact name, email address and phone number.
- If no cost, leave the cost “0.” To cap participant registration, enter “Maximum Participants.”
- Select location- select “online” for virtual workshops and add the online class link (you can add this at a later time if needed). If choosing a physical location, and it is not listed, email the Health Promotion Team at AgeOptions.
- Create the session schedule- select the days of the week the class will meet. Enter the number of times the class will meet (i.e., 6 times), how long the class will meet (i.e. 2.5 hrs.), and the date of the first class.
- If you want any notes displayed on website, enter notes under “Public Notes.”
- Enter any internal notes.
- **Click on generate schedule-** this must be checked for the system to register the workshop. **Once the schedule generates, click “Create.”**

Add a New Location

To add additional provider contacts to your organization, email the Health Promotion Team at AgeOptions.

Add a Participant

AgeOptions will manually register any participants (that have not self-registered on ILPTH) once appropriate documentation has been received. Below are instructions on how to add a participant if you choose to register a participant:

Click the **“classes” tab**. Find the desired class, click "view" to access the class details. In the participant section, click **“+Register a New Participant.”** Fill in the required fields. On the bottom of the page, you will be asked to verify if the participant has or has not received the privacy policy notice. After you verify, click **“register”** to add the new participant to the class.

If you do not have DOB or address information for the participant, please enter the following:

DOB: 01/01/1900

Address: 0000 No Address Zip Code: Enter zip code of organization

Phone number: 999-999-9999

*Note: If you get a pop-up stating the user email is already registered, register the participant as an existing participant. Click **“+Register an Existing Participant”** and search by last name. Click their name, verify participant info and click **“register participant.”** You will only be able to see existing participants if they have taken a class under your organization. If you do not see the participant name, email the Health Promotion Team at AgeOptions.*

Enter Class Participant Data

AgeOptions will manually enter participant attendance and data once appropriate documentation has been received. Below are instructions on how to enter participant data if you choose to do so:

Click the **“classes” tab**. Find the desired class, click **“view”** to access the class details. In the participant section, click the name of the participant (if participant is not listed, you will need to add the participant). If the participant filled out a paper survey, manually enter their survey data here. The attendance record can be documented at the bottom of the page. To upload privacy policy (or liability forms) click on the **“upload”** button.

Advance Class Status

The system will automatically advance the class status based on class dates.

The 4 status are: scheduled, in progress, pending completion and completed. *AgeOptions will update the class status to “completed” once all surveys, attendance and appropriate documentation has been received and entered.*

Manage Your Leader Information

Click on the **“class leader” tab**. You will see your name and programs you are certified in listed. If you need to add an additional certificate, or update your contact information, please contact Joan Fox at AgeOptions: joan.fox@ageoptions.org.