

IL Pathways to Health

Leader User Guide

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About

Illinois Pathways to Health is an initiative designed to connect people who are interested in bettering their health and well-being with programs that are proven to do just that.

We believe a sustainable, integrated evidence-based health promotion network will improve access to valuable community-based health education. The network will support clinical-community linkages bridging gaps in public health prevention strategies. Illinois Pathways to Health will connect nationally recognized evidence-based interventions/programs known to enhance the physical and psychological well-being to participants throughout Illinois.

Supported programs include:

Live Well/ Take Charge

- Aging Mastery Program (AMP)
- Cancer: Thriving and Surviving
- Take Charge of Your Health (Also known as Chronic Disease Self-Management Program)
- Take Charge of Your Diabetes (Also known as Diabetes Self-Management Program)
- Take Charge of Your Pain
- Tomando Control de su Salud
- Tomando Control de su Diabetes
- Workplace CDSMP

Prevent Falls

- A Matter of Balance
- Bingocize
- Fit and Strong!
- Tai Chi for Arthritis and Fall Prevention
- Walk With Ease

Caregiver Support

- Powerful Tools for Caregivers
- Savvy Caregiver
- Stress Busting for Family Caregivers

Functionalities

On ilpathwaystohealth.org, providers can manage their classes as well as capture organizational leader information. The website also has a referral process for family, friends, and healthcare providers to refer a person to a class and includes documents for healthcare providers to learn more about IL Pathways to Health (IPTH) programs. ILPTH has the capability to run customized reports that include participant demographics and self-reported health outcomes. See below for a functionality checklist of ILPTH:

ilpathwaystohealth.org Functionality
Ability to search for classes by location and/or program
Ability to register for classes online at any time
HIPPA compliant and secure system
Healthcare provider referral system
Features compatible with mobile devices*
Built to ADA 2.0 accessibility standards
Robust data capture and reporting
Graphically pleasing website and photos
Local look and feel of regional pages
Video(s) that offer authentic and credentialed testimonials

*Survey feature not available via mobile devices

Partner Roles

At ILPTH, we value partnerships with our communities. A partnership with a community-based organization or health care provider may include hosting evidence-based classes, referring patients, and providing financial support for the evidence-based classes. If you are interested in being a partner, please call (800)699-9043 or email info@ilpathwaystohealth.org.

Getting Started

Ask us a question/ contact us

Use the “Contact” link at the top of the website to communicate any questions. Here, you can fill out your information and type your message. If you are experiencing technical difficulties, you can also email info@ilpathwaystohealth.org for assistance or call our toll-free number at (800)699-9043.

Refer someone to a class

Referring someone to a class may happen for a variety of reasons. As a friend, family member or healthcare provider, you can refer someone you know to an ILPTH class. To do this, go to the, “Make a Referral” tab at the top of ilpathwaystohealth.org, see below.



By clicking this tab, you can fill out information on the person being referred and the referrer. Once complete, press submit, and an email will be sent to the representative in that area. The representative will reach out to the person that was referred via phone or email to see if they are interested in attending a class.

For Program Leaders

Sign up for a leader training

To find an upcoming leader training, go to the “For Class Leaders” tab on ilpathwaystohealth.org. There is a link to upcoming leader trainings, shown here. This link will take you to a page that allows you to search for a leader training by program, zip code, or date. When you find a training that you are interested in, please complete the leader training application. This is located on the “For Class Leaders” page and on the “Apply as a Leader” link.

UPCOMING LEADER TRAININGS

Tai Ji Quan: Moving for Better Balance - Beginner

1/10/2022 - 1/11/2022
8:00 AM - 4:00 PM
[See All Dates](#)

Online

Cost: \$0
Provider Name: Test Organization
Class Leader: Test Umbracco
Location: Online

Contact Name: Dave Fink
Contact Email: dfink@yourjuniper.org
Contact Phone:

Tai Ji Quan: Moving for Better Balance® (TJQMBB) is an evidence-based fall prevention program designed for older adults developed by Fuzhong Li, Ph.D., Senior Scientist at the Oregon Research Institute. TJQMBB represents a substantive enhancement of traditional Tai Ji Quan as it transforms martial arts movements into a therapeutic regimen aimed at improving postural stability, awareness and mindful control of body positioning, functional walking, movement symmetry and coordination, range of motion around the ankle and hip joints and lower - extremity muscle strength.

REGISTER

Register as a leader

To register as a leader, go to the “For Class Leaders” tab. On this page, you will find a blue button on

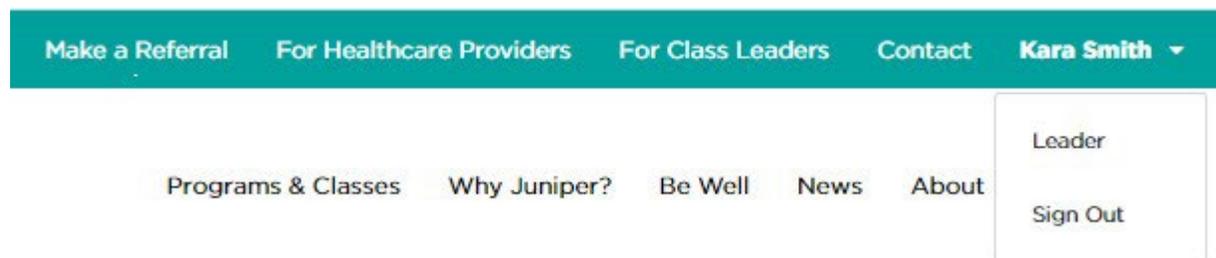
the right side of the page that says, “Apply as a Leader”. Click on this button, and you will be taken to a page where you will fill out your information, including name, email address, phone number, provider, and region. At the bottom of the screen, you will enter the programs you have a current certification with. If you are unsure about the status of your certification, please contact your provider relationship manager.

Once you’ve filled out your information, a thank you will display for registering. You will also receive an email that confirms your registration. From here, your provider relationship manager will approve or deny your registration into ilpathwaystohealth.org. This will happen within two business days of your initial application. Once you are approved, you will receive an email with a temporary password for you to login to ilpathwaystohealth.org.

Login to your leader account

Start by logging into the back end of the website. The back end of the website is an area of the website that only providers, leaders and others logged into their accounts can access. The login button is found at the top right-hand corner of the screen. Enter your email address and the password you created. After signing in you will be taken back to the homepage and your name should now display on the top right corner.

If you click on your name, there will be two options that comes up: Leader and Sign Out. Click on leader, and you will be taken to the back end of the website to access your leader dashboard.



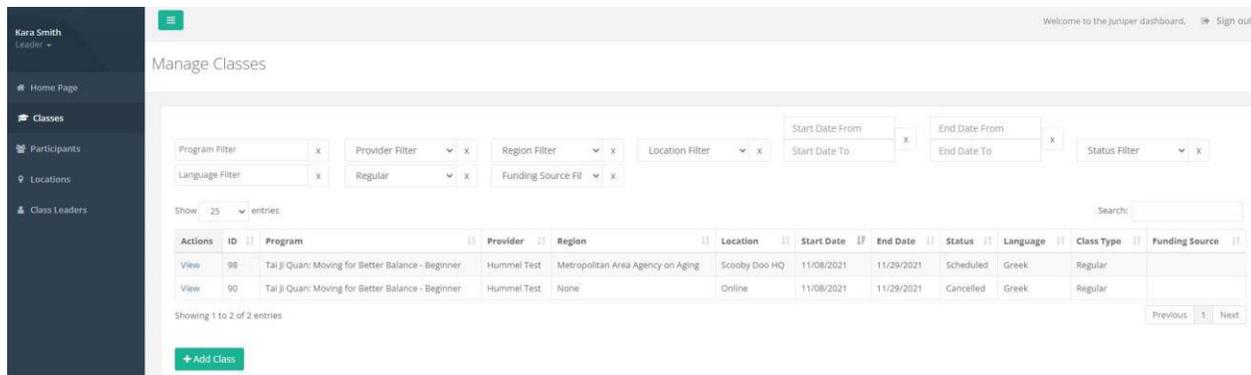
For existing Leader Accounts:

ilpathwaystohealth.org accounts are automatically deactivated when not in use. If you are receiving an error when attempting to login, it may be because your account is inactive. Call the Health Promotion Team at (800)699-9043 or email info@ilpathwaystohealth.org to have your provider account reactivated.

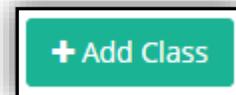
Leader dashboard

Depending on your role with ILPTH, the dashboard allows users to access certain levels of data and functionality within the website. As a leader, you will be able to access your class data, participant’s information, and perform other functions to support the work you do.

After logging in, the “classes” page will default as the main page of the dashboard. On the left side of the page, you will see the different modules you have access to. The image below is an example of what leaders see on their dashboard.



- **Classes:** This tab allows users to manage classes they are leading or have led, and create new classes.
- **Participants:** This tab gives users access to protected health information (PHI) of participants who are taking or have taken ILPTH classes.
- **Locations:** This tab lists locations where your provider has hosted ILPTH classes.
- **Class Leaders:** View and edit your leader’s contact information, and also add new program certifications.
 - **Note:** You will be able to update most of your leader’s contact information except for their email. If they have a new email, you must create a new user account on the front page.



See list of classes you are leading or have led

To find a list of classes you are leading or have led, click on the “classes” tab. Once you are on the “classes” page, all your classes will display on the screen. You have the option to filter and narrow down your search by program name, provider, region, location, start date, end date and status, language, type, and funding Source.

Add a class

To add a class, click on the “classes” tab found on the left side of your dashboard. Once you are looking at the classes list, scroll to the bottom of the page and see a blue “add class” button. This button will take you to a form where you will enter the information for that class. The website will not allow you to create a new class unless you fill in all the required fields with a red asterisk. After you have entered all the required fields and any important class details, click “create” to finish. This class will then be searchable by the public and can be edited by leaders, provider managers, or contacts of the organization.

Before entering a new class location, please check “Existing Class Locations.” Only create a new class location if yours is not already listed.

Fill out the form below to create a Class.

Class Type *
Regular

Program *
-- Please Select --

Class Leader(s) *
--Please Select--

Cost (if there is a cost, please use \$ sign before number. Example: \$25. You may also add text. Example: Fee based on income) *
0

Maximum Participants (optional)

Language *
-- Please Select --

Can participants join this class in-person? Yes No

Select Existing Location *
--Please Select--

Fill out the form below to create a Class.

Class Type *
Regular

Program *
-- Please Select --

Class Leader(s) *
--Please Select--

Cost (if there is a cost, please use \$ sign before number. Example: \$25. You may also add text. Example: Fee based on income) *
0

Maximum Participants (optional)

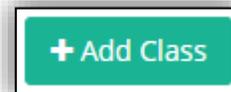
Language *
-- Please Select --

Can participants join this class in-person? Yes No

Select Existing Location *
--Please Select--

Add an online class

Creating an online class is similar to creating an in-person class. The difference is when filling out the “Select Existing Location” field. Click on the drop-down menu and choose the pre-populated location as “online.” Do NOT create a new location for online classes. Select the existing location “Online.” You will still need to fill in the required fields and any important class details to complete this form. Click “create” when finished. This class will then be searchable by the public and can be edited by leaders, provider managers, or contacts of the organization.



Please note: If you do not select the pre-existing “Online” location your classes will not populate in ilpathwaystohealth.org class searches for “Online” classes. The “online class link” field will also not populate.

Select Existing Location *

--Please Select--

Online

Aitkin Public Library - 110 1st Ave NE, Aitkin, MN 56431

Apple Valley Community Center - 14603 Hayes Rd, Apple Valley, MN 55124

Apple Valley Medical Center - 14655 Galaxie Ave, Apple Valley, MN 55124

Dunder Mifflin - 1725 Slough Ave, Scranton, MN 55123

View, edit and change status of class

To view, edit and make any changes to your class, you must be on the “classes” page. You can click on “view” to go to that class’s details.

When clicking this link, be sure to click the actual words, “view,” instead of the blue plus sign that shows up. If you are seeing a blue plus sign, it is because you are looking at a smaller screen or are zoomed in. This will be seen on a mobile device or tablet. When you click this blue plus sign, you will see all columns that you are not able to see on the smaller screen. See the picture to the right for an example listing of classes and the view link.



Actions	Program	↕
View	A Matter of Balance	
View	Stay Active and Independent for Life	
View	Living Well With Chronic Conditions	
View	A Matter of Balance	

Once you click view, the class details can be edited by clicking “edit” in the upper right-hand corner of the page, pictured to the right. You can change the class leaders, location, etc. Once you have made changes, click “update” at the bottom of the page. Note, you cannot edit a class that has already been completed. If you need to edit a class that has been completed, you will need to re-activate the class.

Users also have the option to change the status of their classes between scheduled, in progress, pending completion, complete, cancel and delete. Below are different status options and when you can use them:

- If class is Pending Completion in Progress: **Complete AND Cancel** are an option.
- If class is scheduled: **Cancel** is an option.
- If class is Cancelled OR Complete: **Reactivate** is an option.

Add a new participant to a class

You can add a new participant to a class by clicking on the "classes" tab found on the left side of your dashboard. This should take you to the "manage classes" page. Next, find the desired class and then click "view" to access the class details. In the participation section, click the button labeled "+Register A New Participant," This takes you to the registration page. You will need to fill in the required fields with the red asterisk and include any notes if needed. 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 on "register" to add the new participant to the class.



Add an existing participant to a class

If a participant has taken an ILPTH class in the past, you have the option to add them as an existing participant because they may have already used their email with ILPTH. **Ilpathwaystohealth.org allows only one email per user.** If you try to register them as a new participant with the same email, the website will *not* allow you to complete the registration.

To add an existing participant, click on “+Register an Existing Participant.” By doing this, the website will pull a list of all existing participants who have taken an ILPTH class. In the search field found on the right, type in the member’s name. To avoid long loading times, try searching their last name to narrow down the

results. After you found the participant's name, click their name to view their participant account. You will be able to view their name, home address, contact information, insurance information and a history of classes they have taken. After verifying this is the correct participant, click "register participant" to add them into the class. If you are experiencing any issues refer to "How to Register a Participant".

Register a leader as a participant

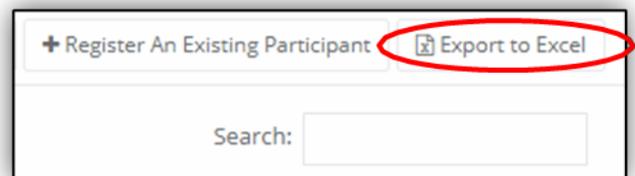
If a class leader is interested in participating in a class, they may not be able to register because their email is already linked to an existing user (their leader account). Leaders can create a participant user account with a **new email address** OR the leader may **call the Health Promotion Team** at (800)699-9043 to have them add the leader as a participant on the back end. The Health Promotion Team will include the class leader's (participant) email in the notes section and will reach out to the leader for that class.

When a participant's account goes inactive

If the user never activates their account by using their temporary password, after 180 days the account will be made inactive. If the user activates their account, they are always active in the MIS unless it is manually switched.

View participants of a class

You can view the participants of the class when you are viewing class details. If you would like to print the participant list, there is an "export" button that will export the list to Excel, seen here. This printed class data report, can be used as an attendance form and can also track participants "enrolled" (anyone who signed up), "starters" (anyone who has attended at least one class) and "completers" (completion based on our completion criteria).



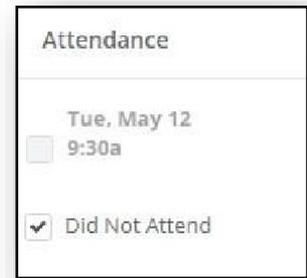
When exporting to Excel, be sure that you are deleting the participant information from the downloads folder of your computer or laptop once it is no longer in use.

If your computer has access to secure file storage, please utilize this option and delete the Excel from downloads, trash, and wherever else it might be saved.

Manage class participant data

It is important to have accurate participant information for reporting purposes. Document class attendance for each participant including if the participant did not attend the class by using the “Did Not Attend” check box.

Do not delete participants from classes even if you are aware they will not be attending your class. Deleting participants will lose the history of that registration. The only exception to this is if the person was registered into a class in error.



The image shows a form titled "Attendance" with a date and time "Tue, May 12 9:30a". Below this, there is a checkbox labeled "Did Not Attend" which is checked with a small downward-pointing arrow.

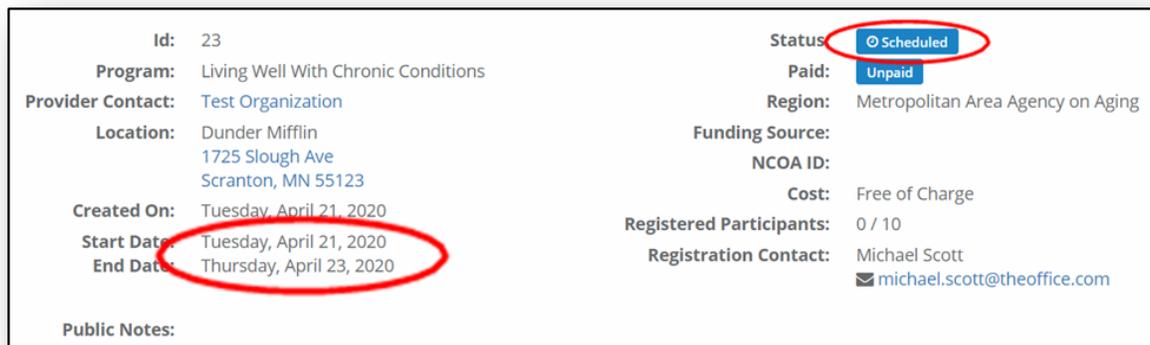
For example: John registered for your Take Charge of Your Diabetes class that starts next week. You get a call from John stating he will no longer be able to attend the class. We want to maintain the history of his registration, so do not delete him from the class. Later that day you get a call from Cindy who is interested in registering in your Take Charge of Your Diabetes class, but the class is full. A solution would be for you to increase the class maximum amount by one person and register Cindy. After your class has finished, and when you enter participant attendance, check the “Did Not Attend” check box for John.

Advance class status

Your class status reflects the stage your class is in based off of the class dates. The website will automatically advance the status of your classes based on the dates from the beginning to end of your class. Every time the website advances your class, you will receive an email notification of the status of your class.

There are four status in which your classes can be in:

1. Scheduled: Any class that is scheduled but has not begun



The image shows a class details form with the following information:

Id: 23	Status: Scheduled
Program: Living Well With Chronic Conditions	Paid: Unpaid
Provider Contact: Test Organization	Region: Metropolitan Area Agency on Aging
Location: Dunder Mifflin 1725 Slough Ave Scranton, MN 55123	Funding Source:
Created On: Tuesday, April 21, 2020	NCOA ID:
Start Date: Tuesday, April 21, 2020	Cost: Free of Charge
End Date: Thursday, April 23, 2020	Registered Participants: 0 / 10
Public Notes:	Registration Contact: Michael Scott ✉ michael.scott@theoffice.com



The image shows a navigation bar with four buttons: "04/21/2020", "04/23/2020", "Scheduled", and "Regular".

2. In Progress: Any class that has started (based on class start date) and has not reach its end date.

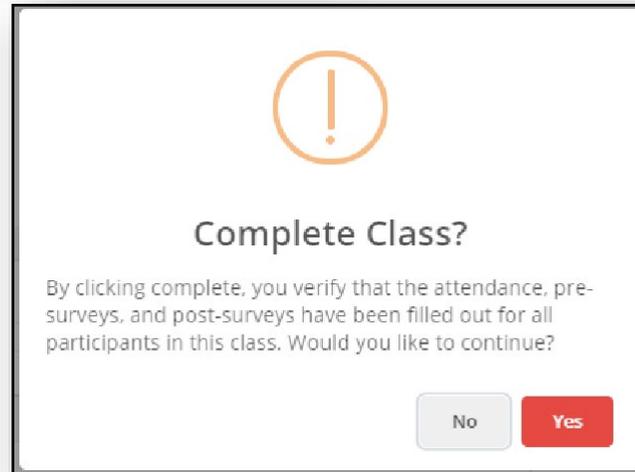
Id: 23	Status: Unpaid
Program: Living Well With Chronic Conditions	Paid: Unpaid
Provider Contact: Test Organization	Region: Metropolitan Area Agency on Aging
Location: Dunder Mifflin 1725 Slough Ave Scranton, MN 55123	Funding Source:
Created On: Tuesday, April 21, 2020	NCOA ID:
Start Date: Tuesday, April 21, 2020	Cost: Free of Charge
End Date: Thursday, April 23, 2020	Registered Participants: 2 / 10
Public Notes:	Registration Contact: Michael Scott ✉ michael.scott@theoffice.com

3. Pending Completion: Any class that has reached the scheduled class end date but has not been manually moved to “completed” status.

Id: 23	Status: Unpaid
Program: Living Well With Chronic Conditions	Paid: Unpaid
Provider Contact: Test Organization	Region: Metropolitan Area Agency on Aging
Location: Dunder Mifflin 1725 Slough Ave Scranton, MN 55123	Funding Source:
Created On: Tuesday, April 21, 2020	NCOA ID:
Start Date: Tuesday, April 21, 2020	Cost: Free of Charge
End Date: Thursday, April 23, 2020	Registered Participants: 2 / 10
Public Notes:	Registration Contact: Michael Scott ✉ michael.scott@theoffice.com

04/21/2020	04/23/2020	PendingCompletion
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4. Completed: Move a class to a “completed” status when all appropriate documentation (surveys, etc.) has been entered into the ilpathwaystohealth.org.



Class email notifications

lpathwaystohealth.org has a feature that will track and automatically change the status of classes from start to finish. Any time there is a change or the class advances, the website will send out an email notification to participants, leaders and/or providers depending on who is fitting.

The tables below demonstrate the intent, content, and timing of emails to each recipient. Below each table there is a link to email templates for to each recipient. For a general overview of when automated management information system (MIS) emails are sent, see the appendix.

Class Concluded Reminder Email Templates: [Email notifications\Class Conclude2.docx](#)

Enter participant survey data

When viewing the list of participants on the class details page, click on a participant's name to be taken to a new page where you can enter information from their pre and post-surveys. To make multiple selections, hold the CTR key while clicking on the desired selections. Once the participant information has been added to the survey, the participant's attendance record should be documented at the bottom of the page. When you are completely done entering participant's data to the class, you must click "complete" at the top right corner of the class details page to signal that the class is complete, and all information has been entered.

Reset your password

1. Click "sign in" at the top right corner of the website and choose "Forgot your password" located under the login information.
2. When you click this, you will be taken to a page, where you will be asked to enter your email address to send a verification code. After you enter your email address click on "Send verification code".
3. You need to open your email in an additional tab. Enter the verification code that was sent to your email in the portal and click on "Verify code".
4. When prompted to "Change e-mail" or continue, choose "Continue".
5. Enter your new password of choice under "New Password" and also under "Confirm New Password." Click on "Continue".
6. If you are experiencing additional issues with re-setting your password, please call our toll-free number at (800)699-9043 or email info@ilpathwaystohealth.org.

Class Registration			
	Participants	Leaders	Registration contact
Intent	Confirms Class Registration Details	Notify that participant has registered for class	Notify that participant has registered for class
When is the email triggered?	Upon registration	Upon registration	Upon registration
Content from ILPTH Management Information System (MIS) to include in email	Name of class	Name of class	Name of class
	Dates of class sessions	Dates of class sessions	Dates of class sessions
	Location of class	Location of class	Location of class
	Cost of class		
	Registration Contact Info (name, email, phone)		
	Public notes		

Class Registration Email Templates: [Class registration notification.docx](#)

Class Cancellation Email			
	Participants	Leaders	Registration contact
Intent	<ul style="list-style-type: none"> •Informs participant that class has been canceled •Directs participant to register for another class or call 1-855-215-2174 	•Informs leader of class cancellation	•Informs leader of class cancellation
When is the email triggered?	Upon registration	Upon registration	Upon registration
Content from ILPTH Management Information System (MIS) to include in email	Name of class	Name of class	Name of class
	Dates of class sessions	Dates of class sessions	Dates of class sessions
	Location of class	Location of class	Location of class
	Cost of Class		
	Registration contact information (name, email, phone)		
	Public notes		

Class Cancellation Email Templates: [Class Cancellation.docx](#)

Upcoming Class Reminder			
	Participants	Leaders	Provider
Intent	<ul style="list-style-type: none"> •Inform of upcoming class seven days prior to first class session 	<ul style="list-style-type: none"> •Inform of upcoming class seven days prior to first class session •Reminder of paperwork •Link to survey information and process instructions 	<ul style="list-style-type: none"> •Inform of upcoming class seven days prior to first class session •Reminder of paperwork •Link to survey information and process instructions
When is the email triggered?	Seven days prior to first class session	Seven days prior to first class session	Seven days prior to first class session
Content from ILPTH Management Information System (MIS) to include in email	Name of class	Name of class	Name of class
	Dates of class sessions	Dates of class sessions	Dates of class sessions
	Location of class	Location of class	Location of class
	Cost of Class		
	Registration contact information (name, email, phone)		
	Public notes		

Upcoming Class Reminder Templates: [Upcoming Class Reminders.docx](#)

Class Nearly Complete			
	Participants	Leaders	Provider
Intent	None	Reminder to administer surveys and change class to completed status once all paperwork is entered into ILPTH.	Reminder to administer surveys and change class to completed status once all paperwork is entered into ILPTH.
When is the email triggered?		Seven days prior to last class session	Seven days prior to last class session
Content from ILPTH Management Information System (MIS) to include in email		Name of class	Name of class
		Dates of class sessions	Dates of class sessions
		Location of class	Location of class

Class Nearly Complete Email Templates: [Class Nearly Complete.docx](#)

Class Concluded Email			
	Participants	Leaders	Provider
Intent	<ul style="list-style-type: none"> •Encourage participants to enroll in another ILPTH class •Encourage participant to continue healthy habits 	Reminder to input all participant survey and attendance information	Reminder to input all participant survey and attendance information
When is the email triggered?	Date of last class session	Date of last class session	Date of last class session
Content from ILPTH Management Information System (MIS) to include in email	Name of class (e.g. "Thank you for attending A Matter of Balance")	Name of class	Name of class
		Dates of class sessions	Dates of class sessions
		Location of class	Location of class

Class concluded Email Templates: [Class Concluded.docx](#)

Class Concluded Email (SECOND REMINDER)			
	Participants	Leaders	Provider
Intent	None	Reminder to input all participant survey and attendance information.	Reminder to input all participant survey and attendance information.
When is the email triggered?		If class has not been moved to "completed" status within 20 days following the last class session, a second reminder email is triggered.	If class has not been moved to "completed" status within 20 days following the last class session, a second reminder email is triggered.
Content from ILPTH Management Information System (MIS) to include in email		Name of class	Name of class
		Dates of class sessions	Dates of class sessions
		Location of class	Location of class

Appendix

Automated management information system (MIS) emails

Role that receives email	Participant	Leader	RegistrationContact
Action that initiates MIS email			
Class Created		X	X
Class Edited		X	X
UpcomingClass Reminder	X	X	
Participant Registration in Class	X	X	X
User Welcome Email	X		
Participant Removal from Class	X		
Class Nearly Complete		X	
Class Concluded	X	X	
2nd Reminder-Class Concluded		X	
Class Cancellation	X	X	X
Referral			