

# **IL Pathways to Health**

## **Leader and Provider Contact User Guide**

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# Getting Started

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## Database Overview

Health Promotion Team requires our Delivery Partners to register their classes (ILPTH workshops) in the ILPTH database. The database can be used by leaders (facilitators) and provider contacts (program coordinators). The process for workshop entry is outlined below:

1. Register Workshop
  - Register workshop in ILPTH.
  - If there are any changes (new dates, different leaders, canceled, etc.) update the workshop in the database.
2. Participants Register
  - Leaders can use their own registration process.
  - Leaders can manually register participants in ILPTH.
  - Participants can self-register using “Find Classes” on the ILPTH website (view class data in ILPTH prior to start of class to check for any new self-registered participants).
3. Class Starts
  - Leaders follow program specific data collection checklists found on the [Leader Resource ILPTH Page](#)
  - Provide participants with required forms (privacy policies, liability waiver, surveys, etc.). Links to workshop materials can be found on the [Leader Resource ILPTH Page](#) Password: **leaders1!**
  - Leaders take attendance at each session.
4. After Last Session
  - After the last session, enter participants, attendance, and data in ILPTH **OR** send to Joan Fox at AgeOptions: [joan.fox@ageoptions.org](mailto:joan.fox@ageoptions.org)
  - AgeOptions will process workshop reimbursement if applicable.

## Need technical or data entry assistance

If you are experiencing technical difficulties with data entry, email the Health Promotion Team at [info@ilpathwaystohealth.org](mailto:info@ilpathwaystohealth.org) for assistance or call our toll-free number at (800)699-9043.

## Refer someone to a class

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](http://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.

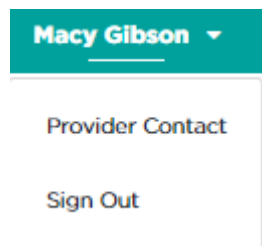
# Using the ILPTH Database

## Add contacts to the organization

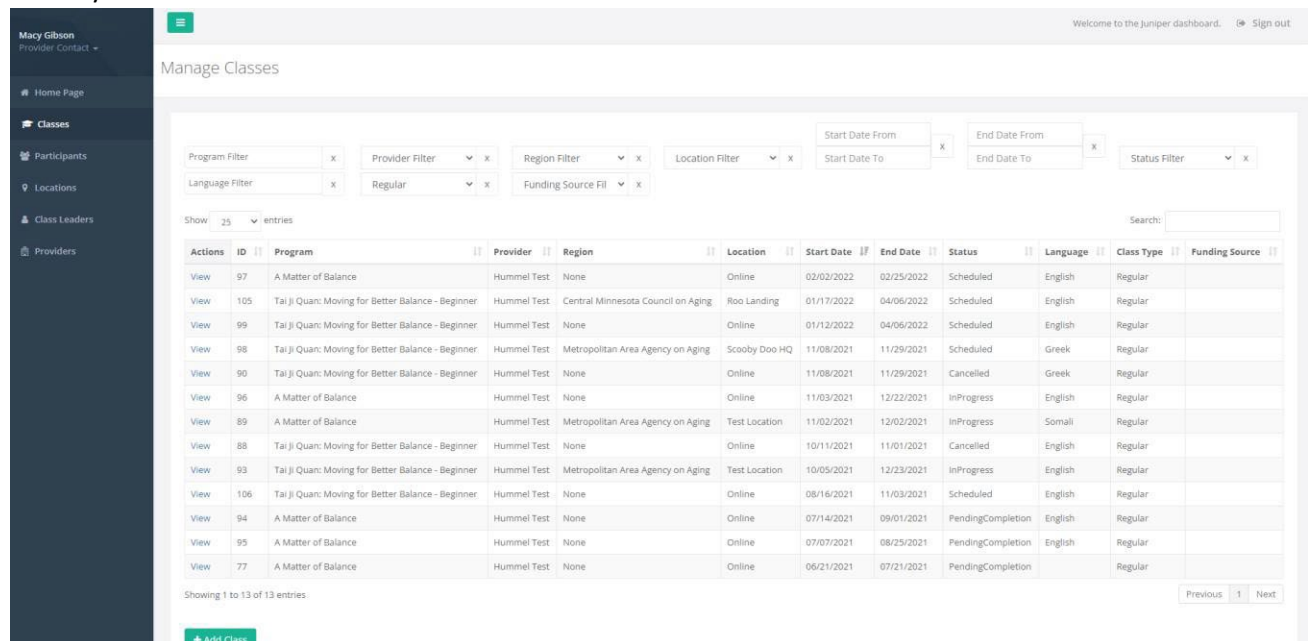
To add additional contacts or leaders to your organization, please contact the Health Promotion Team at (800)699- 9043 or email [info@ilpathwaystohealth.org](mailto:info@ilpathwaystohealth.org).

## Login to your leader or provider contact account

To get started, log into the back end of the website. The back end of the website is an area of the website that only provider contacts, leaders and others logged into their accounts can access. The sign in button is located at the top right-hand corner of the screen. Enter your email address and the password you created. Once logged in, you will be taken back to the home page. If you look up to the right-hand corner where you signed in, it should now say your name.



When you click on your name there will be two options that come up: Provider Contact/ Leader and Sign Out. Click on Provider Contact/ Leader, and you will be taken to the back end of the website. This is your ILPTH dashboard.



For existing provider accounts:

- Ilpathwaystohealth.org accounts are automatically deactivated when not in use. If you receive 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](mailto:info@ilpathwaystohealth.org) to have your account reactivated.

## ILPTH Dashboard

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

The "classes" page will default as the main page of the dashboard. If you look to the left of the page, you should see the different types of modules you have access to.

- **Classes:** This tab allows users to manage classes you 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 add new program certifications.
  - **Note:** You will be able to update all 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.
- **Providers:** This tab allows you to manage your provider's information, add a new contact person and view or edit the programs your provider is currently offering.

### See list of classes you are leading/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, 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 click the blue "add class" button. You will be directed to a form to enter all 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 entering the required information 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.

If you need to enter a new class location, that is not listed in the "Existing Location" dropdown box, email the Health Promotion Team at AgeOptions.

The screenshot shows a web interface for creating a class. On the left is a dark sidebar with navigation links: Home Page, Classes, Participants, Locations, Class Leaders, and Providers. The top right of the page says 'Welcome to the Juniper dashboard' and 'Sign out'. The main content area is titled 'Create Class' and 'Classes / Create'. Below this is a form with the following fields:

- Class Type \***: A dropdown menu with 'Regular' selected.
- Provider \***: A dropdown menu with '-- Please Select --'.
- Program \***: A dropdown menu with '-- Please Select --'.
- Class Leader(s) \***: A dropdown menu with '-- 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) \***: A text input field containing '0'.
- Maximum Participants (optional)**: A text input field.
- Language \***: A dropdown menu with '-- Please Select --'.
- Can participants join this class in-person?**: Radio buttons for 'Yes' and 'No'.
- Select Existing Location \***: A dropdown menu with '-- Please Select --'.
- Registration Contact**: A section with four fields:
  - First Name \***: Text input field.
  - Last Name \***: Text input field.
  - Email Address \***: Text input field.
  - Phone Number**: Text input field.

## 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. ONLY select the existing location “Online.” You will still need to fill in the required fields and any important class details as usual 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 class will not populate in the search 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 the view link 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 viewlink.

Once you click view, the class details can be edited by clicking “edit” in the upper right-hand corner of the page, pictured here. 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.

Actions	Program
<a href="#">View</a>	A Matter of Balance
<a href="#">View</a>	Stay Active and Independent for Life
<a href="#">View</a>	Living Well With Chronic Conditions
<a href="#">View</a>	A Matter of Balance

[Edit](#) [Complete](#) [Cancel](#)

Users also have the option to change the status of their classes between scheduled, in progress, pending completion, complete, and cancel. 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

To add a new participant to a class, click on the "classes" tab found on the left side of your dashboard. This should take you to the "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" found to the right side of that section. When you click this, you will be taken 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 and the liability agreement. 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.

## View participants of a class

You can view the participants of the class when you are viewing class details. To print the participant list, click the "export" button which will export the list to Excel. When you export the class list, you can print the class list and use it as an attendance form. The class data report 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.

For more resources on best practices when handling protected health information (PHI) please refer to the link for the HIPAA training video.

[https://youtu.be/g8P\\_4QggI2c](https://youtu.be/g8P_4QggI2c)

## 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.

Attendance

Tue, May 12  
9:30a

Did Not Attend

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.

+ Register An Existing Participant **Export to Excel**

Search:

After your class has finished, and when you enter participant attendance, check the “Did Not Attend” check box for John.

### Advance class status

The website will automatically advance the status of classes you create based on class dates. This feature will track and automatically change the status of your classes from start to finish. Every time the website advances your class, you will receive an email notification of the status of your class.

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


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

Id: 23  
Program: Living Well With Chronic Conditions  
Provider Contact: Test Organization  
Location: Dunder Mifflin  
1725 Slough Ave  
Scranton, MN 55123  
Created On: Tuesday, April 21, 2020  
Start Date: Tuesday, April 21, 2020  
End Date: Thursday, April 23, 2020  
Public Notes:

Status: **Scheduled**  
Paid: Unpaid  
Region: Metropolitan Area Agency on Aging  
Funding Source:  
NCOA ID:  
Cost: Free of Charge  
Registered Participants: 0 / 10  
Registration Contact: Michael Scott  
✉ michael.scott@theoffice.com

04/21/2020	04/23/2020	Scheduled	Regular
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2. In Progress: Any class that has started (based on class start date) and has not reach its end date.
3. Pending Completion: Any class that has reached the scheduled class end date but has not been manually moved to “completed” status.
4. Completed: Email the Health Promotion Team at AgeOptions to move the class to “completed” status when all appropriate documentation (surveys, etc.) has been entered into the ilpathwaystohealth.org.



### Complete Class?

By clicking complete, you verify that the attendance, pre-surveys, and post-surveys have been filled out for all participants in this class. Would you like to continue?

<p><b>Id:</b> 23</p> <p><b>Program:</b> Living Well With Chronic Conditions</p> <p><b>Provider Contact:</b> Test Organization</p> <p><b>Location:</b> Dunder Mifflin 1725 Slough Ave Scranton, MN 55123</p> <p><b>Created On:</b> Tuesday, April 21, 2020</p> <p><b>Start Date:</b> Tuesday, April 21, 2020</p> <p><b>End Date:</b> Thursday, April 23, 2020</p> <p><b>Public Notes:</b></p>	<p><b>Status:</b> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">✔ Completed</span></p> <p><b>Paid:</b> Unpaid</p> <p><b>Region:</b> Metropolitan Area Agency on Aging</p> <p><b>Funding Source:</b></p> <p><b>NCOA ID:</b></p> <p><b>Cost:</b> Free of Charge</p> <p><b>Registered Participants:</b> 3 / 10</p> <p><b>Registration Contact:</b> Michael Scott ✉ michael.scott@theoffice.com</p>
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04/21/2020	04/23/2020	Complete
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## 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 CTRL 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, email the Health Promotion Team at AgeOptions to advise all information has been entered. The Health Promotion Team will move the class to "completed" status.

## Upload participant privacy policy and waiver of liability

To upload participant privacy policies, you must be logged into the back end of the website as a provider. Once you are logged-in, search for your class and proceed to the class details page. In the class details page, click on the participant's name to be taken to the participant details page where you can enter their privacy policy. Under the "Privacy Policy Consent" heading, click on the red "upload" button, to upload the participant's privacy policy. To upload the waiver of liability, under the "Waiver of Liability Documentation" heading, click on the red "upload" button and upload the waiver. Once both documents are uploaded, then scroll to the bottom of the page and click on the blue "update" button to finalize.

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### Privacy Policy Consent

Upload Privacy Policy Consent

Upload (Browse)

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### Waiver of Liability Documentation

Upload signed Release and Waiver of Liability Agreement

Upload (Browse)

## Requesting reimbursement

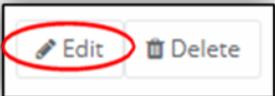
1. Upload all participant survey data and privacy policies for the class, and email the Health Promotion Team at AgeOptions to advise all information has been entered **OR** send paperwork via secure email to [ilpathwaystohealth.org](mailto:ilpathwaystohealth.org) or mail to:  
AgeOptions- CONFIDENTIAL  
Health Promotion Team  
1048 Lake St., Suite 300  
Oak Park, IL 60301
2. AgeOptions will change the status of your class from "pending-completion" to "complete" upon data entry.
3. ILPTH staff will verify completer/paperwork reimbursement based on provider contract agreement.
4. Payment will be sent to the organization's address.

## Manage your leader's information

To view or make any changes to your leader's information, click on the "Class Leaders" tab on the left side of your dashboard. A list of leaders will be displayed, find the leader you are inquiring about and click on their name. This will allow you to view the leader's profile which includes name, email, classes

led, program certifications, phone number, region, provider, date registered, and notes. To edit information or add new program certifications, click on the “edit” button found on the top right of the screen. The only field you will not be able to update is the leader’s email. If the leader has a new email, they will have to go to the home page and register again as a leader under the new email. Once you are finished updating the leader’s information, click “Update” on the bottom to save your changes. If you are experiencing any technical difficulties, email [info@ilpathwaystohealth.org](mailto:info@ilpathwaystohealth.org) or call (800)699-9043.

Name	Provider Contact
Dwight Schrute	Test Organization
Jim Helpert	Test Organization



**First Name \***  
Dwight

**Last Name \***  
Schrute

**Email Address \***  
dwight.schrute@theoffice.com

**Phone Number**

**Provider Contact \***  
Test Organization

**Region \***  
Metropolitan Area Agency on Aging

**Certifications**

<b>Program</b> A Matter of Balance	<b>Leader Certification</b> Leader/Instructor/Coach
<b>Program</b> Arthritis Foundation Exercise Program	<b>Leader Certification</b> Leader/Instructor/Coach
<b>Program</b> Living Well With Chronic Conditions	<b>Leader Certification</b> Leader/Instructor/Coach
<b>Program</b> Diabetes Prevention Program	<b>Leader Certification</b> Leader/Instructor/Coach

**Add Certification**

**Update** **Cancel**

## Add a leader

To add a leader, access the main page of [ilpathwaystohealth.org](http://ilpathwaystohealth.org). You do not need to be logged in to perform this step but can be. Click on the “For Classes Leaders” tab on the top right corner. Next, you will click the blue “Apply as a Leader” button located on the right-hand side, below the “For Class Leaders” headings. You will be asked to complete a leader form which includes the leader’s name, contact information, provider contact, region, and program certification(s). Next, you will check the box on the bottom to verify that you agree to have completed the leader training and will follow program fidelity of the class curriculum. Once you finish, click the blue “register” button.

The leader will receive a thank you email for signing up as a leader. At this time, please allow two business days for the Health Promotion Team at AgeOptions to approve or deny the request. Once approved, the leader will receive an email with a temporary password and must go through the process of setting up a new password for their user account. The provider contact will also receive an email confirmation about the approval or denial of the leader request.

If a provider contact would like to add program leader certifications to an account, email the Health Promotion Team at AgeOptions.

## 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 under “Confirm New Password.” Click on “Continue”.

## Appendix

### Automated management information system (MIS) emails

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