

Take Charge Program Data Collection Checklist

Registration	<ul style="list-style-type: none"> <input type="checkbox"/> Leaders or coordinators register workshops in ILPTH. Note: If any changes need to be made (new dates, different leaders, canceled, etc.) log in to ILPTH and update the workshop. Also, alert Joan Fox at AgeOptions with any updates or cancelations: joan.fox@ageoptions.org. <p>Login Link is located on the ILPTH website on the upper right-hand side: https://ilpathwaystohealth.org</p> <ul style="list-style-type: none"> <input type="checkbox"/> Register participants- Participants can register through the “Find a Class” page on the ILPTH website. You can send interested participants the workshop registration link, or manually register new participants in ILPTH. <input type="checkbox"/> Leaders call participants- Introduce the program and what to expect. If virtual, discuss technology and need for assistance to access virtual platform. If needed, inform participants a technical assistant will contact them to practice before the first session. <input type="checkbox"/> Virtual workshop- mail participants workshop books/materials (including survey forms and prepaid envelopes if participants will not be using electronic surveys).
Workshop Paperwork	<p>Electronic participant surveys are available through the participant portal in ILPTH at: https://ilpathwaystohealth.org</p> <p>Leader forms can be accessed on the ILPTH Class Leader page at: For Class Leaders - IL Pathways to Health</p>
2-3 Days Before Workshop	<ul style="list-style-type: none"> <input type="checkbox"/> Virtual workshop- Leaders and Technical Assistant (TA) practice. <input type="checkbox"/> Virtual workshop- TA calls participants to provide instruction to access virtual platform (i.e. Zoom) and utilize functions if assistance was requested.
1 Day Before Workshop	<ul style="list-style-type: none"> <input type="checkbox"/> Virtual workshop- Leaders send pre-workshop reminder email with workshop link to platform (i.e., Zoom), Zoom instructions if applicable, and participant guide explaining how to complete onboarding paperwork. <input type="checkbox"/> In-person workshop- Leaders email, call or text workshop reminder to participants.
During and After Each Session	<ul style="list-style-type: none"> <input type="checkbox"/> Leaders fill in the attendance form. Please write legibly or use electronic form. <input type="checkbox"/> Send participants Action Plan reminder email 3 days after workshop session. <input type="checkbox"/> Virtual workshop- Send participants reminder email the day before or day of with the workshop link. <input type="checkbox"/> Leaders contact participants who miss sessions or do not return for feedback.

Session 1	<ul style="list-style-type: none"> <input type="checkbox"/> Leader fills in the attendance sheet. Please write legibly or fill in electronically. <input type="checkbox"/> Email the attendance sheet to Joan Fox at AgeOptions: joan.fox@ageoptions.org <input type="checkbox"/> Remind participants to access the ILPTH Participant Portal to complete the Pre-Survey. Explain the evaluation forms to participants following the Evaluation Description Script. If paper surveys are used instead, have participants complete and turn in. <input type="checkbox"/> In-person workshop- If you will be taking photos, distribute the media release form. <input type="checkbox"/> Virtual workshop- If participants were mailed paper forms, ask participants to mail completed Session 1 forms using the prepaid envelope.
Session 2	<ul style="list-style-type: none"> <input type="checkbox"/> Repeat all steps with new participants. <input type="checkbox"/> No one is permitted to join the workshop after Session 2, to maintain fidelity.
Last Session	<ul style="list-style-type: none"> <input type="checkbox"/> Double-check that the attendance sheet has been filled out accurately. <input type="checkbox"/> In the last 15 minutes of the session, go through the steps to complete the Post-Survey. <input type="checkbox"/> Virtual workshop- Send thank you email to participants with directions to fill out Post-Survey on the Participant Portal. <input type="checkbox"/> If participants were mailed paper forms, ask participants to mail completed Post-Survey using the prepaid envelope.
After Last Session	<ul style="list-style-type: none"> <input type="checkbox"/> Immediately after the last session concludes, leaders email the completed attendance sheet to Joan Fox at AgeOptions: joan.fox@ageoptions.org <input type="checkbox"/> Leaders or coordinators ensure participants, attendance, and all appropriate documentation (surveys, etc.) have been entered in ILPTH. Once entered, coordinators update the class status in ILPTH to “complete.” <input type="checkbox"/> Coordinators need to fill out the workshop reimbursement request form. <p>Workshop Reimbursement Request Form Link: https://forms.office.com/Pages/ResponsePage.aspx?id=x6x8YvMFHE-xhK5Sa7jK2wpV34eWYJ9DmDfc5AxY2OxURjI0VEYxVVRUVFIVTTc0OUIzMzhYQUhTOCQIQCN0PWcu</p> <p>* Leaders may also need to send the completed attendance sheet to their program coordinator. Check with coordinator for clarification.</p>
<p style="text-align: center;">If you have any questions about this process, please direct them to your program coordinator. If you are unclear about who your program coordinator is, please contact Joan Fox at AgeOptions: joan.fox@ageoptions.org</p>	