

IL Pathways to Health

Leader and Provider Contact Quick Reference



Workshop Data Entry Process

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
 - AgeOptions will process workshop reimbursement if applicable.

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, etc.
- 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: info@ilpathwaystohealth.org
- 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 a new location to your organization, email The Health Promotion Team at AgeOptions: info@ilpathwaystohealth.org

Add 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’s name, email the Health Promotion Team at AgeOptions.*

Upload Participant Privacy Policy/ Waiver

Scan each individual **participant privacy policies and liability waiver** to your computer.

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. You will then be taken to the participant screen. **Note:** *If you do not see the participant listed, you will need to add the participant.*

To upload the forms, click on the “upload” button located near the top of the participant’s record. Upload each file.

You can send the forms to the Health Promotion at AgeOptions instead of uploading.

Enter Participant Survey Data

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. You will then be taken to the participant screen. **Note:** *If you do not see the participant listed, you will need to add the participant.*

If the participant filled out a paper/fillable PDF, manually enter their survey data. On the participant screen, click on “Pre-Survey” and/or “Post-Survey” and fill in the data.

If the participant used the Microsoft Forms Electronic Survey Link, the data will automatically be sent to AgeOptions. You do not have to do anything on your end, AgeOptions will enter the data.

Enter Participant Attendance

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. You will then be taken to the participant screen. The attendance record can be documented at the bottom of the participant’s record.

Note: *If you do not see the participant listed, you will need to add the participant.*

Advance Class Status

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

The 4 statuses are: scheduled, in progress, pending completion and completed.

Email The Health Promotion Team at AgeOptions to advise surveys, attendance and appropriate documentation has been entered. AgeOptions will update the class status to “complete.”

Manage Leader Information

Click on the “**class leader**” tab. You will see your name and program certificates listed. If you need to add an additional certificate, contact The Health Promotion Team at AgeOptions.

If you are a program coordinator, you will see a list of leaders under your organization displayed. This will allow you to view the leaders profile. To edit or add a new certificate, click “add certificate” and “update.” To add a new leader or provider contact, contact The Health Promotion Team at AgeOptions: info@ilpathwaystohealth.org