IL Pathways to Health
Leader Quick Reference for Caregiver Resource Specialists

Illinois Pathways to Health by AgeOptions

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. Also, alert Joan Fox at AgeOptions with any updates or cancelations: joan.fox@ageoptions.org.
2. Participants Register
   - Participants can register through the "Find A Class" page on the ILPTH website.
   - Leaders can also manually register participants.
3. Prior to and Start of Class
   - Leaders can view/manage class data in ILPTH and ensure all participants are registered and completed any required first session paperwork.
4. After Last Session- Update the Class Status
   - After the last session, leaders ensure participants, attendance, and all appropriate documentation (surveys, etc.) have been entered. Email Joan Fox at AgeOptions to update the class status to completed: joan.fox@ageoptions.org.
   - If paper forms were used instead and you need assistance with data entry, scan and email forms to Cristina Diaz at AgeOptions: cristina.diaz@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 on 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 there is 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, you need to enter a new location on the location tab.
- 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 on "Create."**

Add a New Location

Click on the "locations" tab. On the bottom of the page, click the green "add location" button. Fill in all required fields- location name, facility type, address and county. Click on **"Save."**

Note: Make sure location is not already existing before creating a new location.

Add a Participant

Click on the **"classes" tab**. Find the desired class and then click "view" to access the class details. In the participant section, click the button labeled "+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 on "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

Note: If a participant has taken an ILPTH class in the past, you will get a pop up that their user email is already registered. You then need to register the participant as an existing participant. To do so click on "+Register an Existing Participant" and then search by last name. Click on their name, verify participant info is correct and click "register participant." You will only be able to see existing participants if they have taken a class of yours. If you do not see the participant name, contact your program coordinator, or call or email the Health Promotion Team at AgeOptions.

Enter Class Participant Data

Click on the **"classes" tab**. Find the desired class and click "view" to access the class details. In the participant section, click on the name of the participant (if participant is not listed, you will need to add the participant). If participants filled out paper surveys, you can 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. You will need to alert Joan Fox at AgeOptions to update the class status to "completed" status once all surveys, attendance and appropriate documentation has been entered: joan.fox@ageoptions.org.

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.