

IL Pathways to Health Provider Contact Quick Reference



Workshop Data Entry Process

1. Register Workshop
 - Leader or Provider Contact registers workshop in ILPTH.
 - If there are any changes (new dates, different leaders, canceled, etc.) update the workshop in the database.
2. Participants Register
 - Participants can register through the “Find A Class” page on the ILPTH website.
 - Leaders or Provider Contacts can also manually register participants.
3. Prior to and Start of Class
 - Follow the program specific data collection checklist- found under leader resources on the class leader page.
 - Leaders can view/manage class data in ILPTH and ensure all participants are registered and completed first session paperwork.
Note: Electronic surveys are available in English on ILPTH. Spanish electronic surveys are available on Microsoft Forms. Paper forms are also available. Links to program specific forms can be found on the leader resource page on ILPTH.
4. After Last Session- Update the Class Status
 - After the last session, leaders or providers must ensure participants, attendance, and all appropriate documentation (surveys, etc.) have been entered. Once all data is entered, provider contacts change class status to “Complete.”
5. Request Reimbursement
 - Provider Contact fills out workshop reimbursement request form.

Dashboard Navigation

- Classes Tab:** Manage classes you are leading or create a new class.
- Participants Tab:** Access participant PHI and contact info.
- Locations Tab:** Manage classes you are leading or create a new class.
- Class Leader Tab:** View and edit leader’s contact information and add new program certifications.
- Providers Tab:** Manage your provider’s information and view or edit the programs your provider is currently offering.

Login to your Provider Dashboard

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 “provider contact.” 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.
- 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.”
- **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 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 under your organization. If you do not see the participant name, call or email the Health Promotion Team at AgeOptions.

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 need to manually move a class to "completed" status. Click on the **“classes” tab**. Find the desired class and click "view" to access the class details. Click on "Complete" on the upper right side of the page.

Manage Leader Information

Click on the **“class leader” tab**. A list of leaders will be displayed. Click on the leader's name. This will allow you to view the leaders profile- name, email, classes led, program, etc. To edit, click on "edit." The only field you cannot edit is the leader's email. Click on "add certificate" and "update" to add a new certification.

Manage Your Organization's Information

Click on the **“providers” tab**. Click on your organization's name. This will allow you to view your organization's profile. To edit, click on "edit." To add any new programs, check the box next to the appropriate program. Click "save."

Note: Adding a new program to your profile will allow you to register classes and input participant information for that program. However, to be reimbursed, you will need an active contract on file. 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.

Request Reimbursement

Ensure that all participant data is entered and update the class status to "Complete." Complete and submit the [ILPTH Workshop Reimbursement Request Form](#). Send attendance sheet, and if used, paper participant paper surveys via secure email to joan.fox@ageoptions.org or mail to AgeOptions.

Add a Leader

Click on the **“for class leaders” page**. Click on the blue "Register as a leader" button on the right-hand side. Complete the leaders form and click "register." **OR** Click on the **“class leaders” tab** and click on the green "add class leader" button. Enter the leaders contact information, organization and region, and certificate information.

Add Contacts to Your Organization

To add additional provider contacts to your organization, please call or email the Health Promotion Team at AgeOptions.