

## Take Charge of Your Health Data Collection Checklist

Workshop	Participant and leader forms can be accessed on the ILPTH Leader Resource
Paperwork	
Registration	<ul> <li>Register workshop- Sign in to ILPTH to register workshop.</li> <li>Sign-In Link is located on the ILPTH website on the upper right-hand side: https://ilpathwaystohealth.org</li> <li>Register the workshop by clicking on "Classes" tab and "Add Class."</li> <li>If adding a class zero, do not add the class zero in the schedule. Put the class zero date in the public note section.</li> <li>When choosing a host site location, if it is not listed in ILPTH, contact the Health Promotion Team at AgeOptions to add the new location.</li> <li>If at any time changes need to be made (new dates, different leaders, canceled, etc.) log into ILPTH, Update the workshop and save changes.</li> <li>New Leaders must request a fidelity visit by clicking on the "Schedule a Fidelity Visit" button on the ILPTH Leader Page.</li> <li>Register participants using your own registration process.</li> <li>Leaders call participants- Introduce the program, what to expect, discuss technology if applicable, etc. If needed, inform participants a technical assistant will contact them to practice before the first session.</li> <li>Virtual workshop- Send participant welcome email with virtual class link, Zoom Instructions (if applicable), and workshop ID (if paper forms are mailed). Mail participants workshop books/materials (including survey forms and prepaid envelopes if using paper forms).</li> </ul>
Prior to Workshop Start Date	<ul> <li>Check ILPTH to see if new participants self-registered using the ILPTH website (Sign into ILPTH. Click "Classes" and search for your workshop. Click on "view" to see a list of registered participants).</li> <li>Virtual workshop- Leaders and Technical Assistant (TA) practice.</li> <li>Virtual workshop- Email pre-workshop reminder with virtual class link and Zoom Instructions (if applicable).</li> <li>In-person workshop- Email/call/text workshop reminder to participants.</li> </ul>
During/ After each Session	<ul> <li>Leaders fill in the attendance form. Please print legibly or fill in electronically.</li> <li>Email participants Action Plan reminder 3 days after workshop session.</li> <li>Virtual workshop- Email workshop reminder the day before/morning of workshop with the virtual class link.</li> <li>Leaders contact participants who miss sessions or do not return for feedback.</li> </ul>
Session 1	<ul> <li>Leader fills in the attendance sheet. Please print legibly or fill in electronically.</li> <li>Explain the evaluation forms to participants following the <u>Data Collection Script</u> OR <u>Virtual Workshop Script</u>.</li> <li>Participants complete the <u>Registration Packet</u> (Registration Form, Privacy Policy, Liability Waiver) and <u>Pre-Survey</u> using one of the following options:         <ol> <li>Participants who self-registered for the class using the ILPTH website can be sent the <u>Participant Guide</u> to complete required forms on the ILPTH Participant Portal.</li> <li>Participants are emailed a fillable PDF or an electronic form link.</li> <li>Email Amanda Moudry at AgeOptions for your specific workshop</li> </ol> </li> </ul>

Session 1	<ul> <li>3. Participants complete paper surveys. Note: Participants will need to include the workshop ID on all forms.</li> <li>In-person workshop- Participants complete and turn in.</li> <li>Virtual workshop- Participants are mailed forms during the registration process. Ask participants to mail completed forms using the prepaid envelope.</li> <li>If you take photos, participants must sign the Media Release Form.</li> </ul>	
Session 2	<ul> <li>Repeat all steps with new participants.</li> <li>No one is permitted to join the workshop after Session 2, to maintain fidelity.</li> </ul>	
Last Session	<ul> <li>Double-check that the attendance sheet has been filled out accurately.</li> <li>In the last 15 min of the session, participants complete the <u>Post-Survey</u> using one of the following options:         <ol> <li>Participants log into their ILPTH Participant Portal to complete forms.</li> <li>Participants are sent a thank you email with an attached fillable PDF or an electronic form link.</li> <li>Participants complete paper surveys. Note: Participants will need to include the workshop ID on all forms.</li> <li>In-person workshop- Participants complete and turn in.</li> <li>Virtual workshop- Participants were mailed forms during the registration process. Ask participants to mail completed Post-Survey using the prepaid envelope.</li> </ol> </li> </ul>	
After Last Session	<ul> <li>Immediately after the last session concludes, enter participants, attendance, survey data, and upload privacy policies and liability waiver to ILPTH <b>OR</b> send all paperwork to Joan Fox at AgeOptions: joan.fox@ageoptions.org</li> <li>The ILPTH User Guide provides instructions for data entry.</li> <li>If you choose to enter all data in ILPTH, email the Health Promotion Team at AgeOptions to advise all data has been entered and the workshop is complete.</li> </ul>	
If you have any questions about this process, please direct them to Jaime Peña at AgeOptions: jaime.pena@ageoptions.org		
For questions regarding entering data, contact the Health Promotion Team at AgeOptions: info@ilpathwaystohealth.org		

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