# ILPTH User Guide
How to Register Workshops and Enter Participant Data
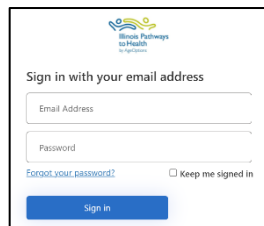

<u>Workshop Data Entry Process Overview</u>

1. Register Workshop
   - Sign into you leader/provider account to register workshop in ILPTH.
   - If there are any changes (new dates, different leaders, canceled, etc.) update/edit the workshop in ILPTH.
2. Participants Register
   - Register participants using your own registration process (use your own sign-up forms, etc.) **OR**
   - Send participants a direct ILPTH workshop link to self-register (participants can also use "Find Classes" on the ILPTH website to register).
   - View participants 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 to provide participants with required forms (privacy policies, liability waiver, surveys, etc.).
   - Leaders take attendance at each session.
   - Links to all workshop materials can be found on the **<u>Leader Resource ILPTH Page</u>** - Password: **leaders1!**
4. After Last Class Session
   - After the last session, add participants, enter attendance and participant survey data, and upload privacy policies and liability waivers in ILPTH **OR** send to Joan Fox at AgeOptions: joan.fox@ageoptions.org
   - If entering participant data, email Joan Fox at AgeOptions to advise all data has been entered: joan.fox@ageoptions.org
   - AgeOptions will update class status to "complete" and process workshop reimbursement if applicable.

## How to Sign Into your Leader/Provider Account

- Sign In button is located at the top right-hand corner on ILPTH website. www.ilpathwaystohealth.org
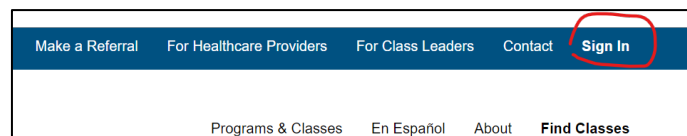
- Enter your email address and password.

- Once signed in, you will be taken back to the home page.
- If you look up to the upper right-hand corner where you signed in, it should now say your name.
- If you click on your name, 3 options come up:
  - Clicking on "My Profile" will take you to your participant portal.
  - Clicking on your role ("leader" or "provider contact") will take you to the back end of the website- the ILPTH Dashboard.
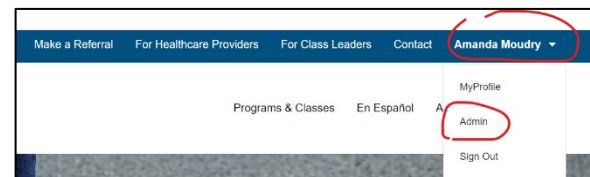
How to Add a Class

- Sign into the ILPTH Dashboard.
  www.ilpathwaystohealth.org
- Click the **"classes" tab**.
  On the bottom of the page, click the green "add class" button.

- You will then be taken to the "Create A Class" page.
- 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 "Yes/No" if participants join in person and online.
  For virtual workshops and add the online class link.
  For in-person, select a location from the existing location drop-down box.
  If a location is not listed, email the Health Promotion Team at AgeOptions.

- 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 there is a class zero, DO NOT add it to the schedule (add it to public notes).
- If you want any notes displayed on website, enter notes under "Public Notes." Enter Class Zero Date in this section (if applicable).
- Enter any internal notes (ex. If there is a leader sub for the day).
- **Click on generate schedule**- this must be checked for the system to register the workshop.
- **Once the schedule generates, click "Create."**

How to View/Add a Participant

- Sign into the ILPTH Dashboard.
  www.ilpathwaystohealth.org
- Click the **"classes" tab**.
- Find the desired class, click "view" to access the class details.
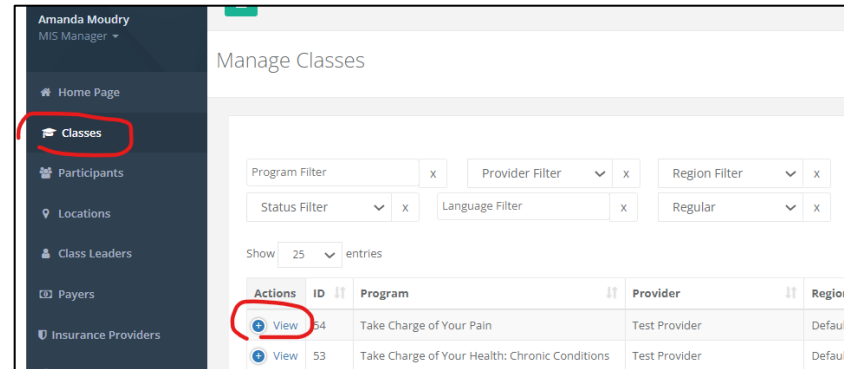
- You will then be taken to the "Class Details" page.
- Scroll down until you see the participant section. A list of registered participants will be displayed.

- To add a new participant, click "+Register a New Participant." Fill in the required fields.
  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 the participant's name, verify info is correct and click "register participant." If you do not see the participant's name, email the Health Promotion Team at AgeOptions.
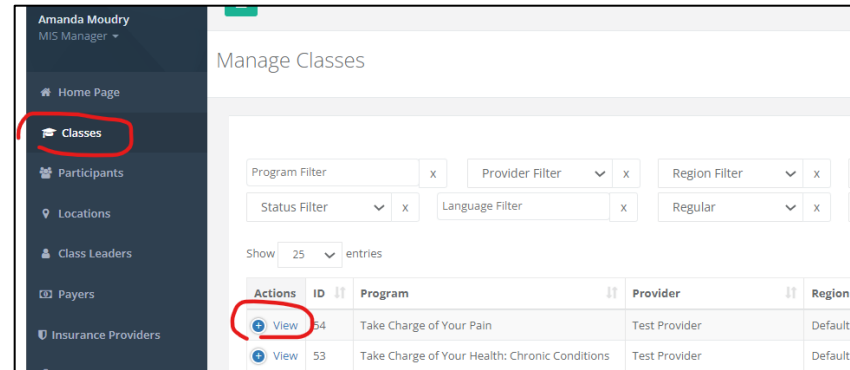
If you do not have DOB or address information for the participant, please enter the following:
DOB: 01/01/1900
Address: 0000 No Address
Enter Zip Code of Organization providing workshop
Phone number: 999-999-9999

- 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.

How to Enter Participant Attendance

- Sign into the ILPTH Dashboard.
  www.ilpathwaystohealth.org
- Click the **"classes" tab**.
- Find the desired class, click "view" to access the class details.

- You will then be taken to the "Class Details" page.
- Scroll down until you see the participant section and click the name of the participant.
  Note: *If you do not see the participant listed, you will need to register the participant first.*

- You will then be taken to the participant screen.
  The attendance record can be documented at the bottom of the participant's record. Check the box next to each session the participant attended.
  If participant did not attend, check "Did Not Attend."

- Click "Update" at the bottom of the page when complete.

How to Enter Participant Survey Data (for paper or fillable PDF surveys that were collected)

- Sign into the ILPTH Dashboard.
  www.ilpathwaystohealth.org
- Click the **"classes" tab**.
- Find the desired class, click "view" to access the class details.

- You will then be taken to the "Class Details" page.
- Scroll down until you see the participant section and click the name of the participant.
  Note: *If you do not see the participant listed, you will need to register the participant first.*

- You will then be taken to the participant screen.
  On the participant screen, click on "Pre-Survey" and/or "Post-Survey" and fill in the data.

- Click "Update" at the bottom of the page when complete.

How to Upload Participant Privacy Policy/ Waiver

- Scan each individual **participant privacy policies and liability waiver** to your computer.
  Note: If you do not want to upload each individual form, you can send the forms to Joan Fox at AgeOptions: joan.fox@ageoptions.org

- Sign into the ILPTH Dashboard.
  www.ilpathwaystohealth.org
- Click the **"classes" tab**.
- Find the desired class, click "view" to access the class details.

- You will then be taken to the "Class Details" page.
- Scroll down until you see the participant section and click the name of the participant.
  Note: *If you do not see the participant listed, you will need to register the participant first.*

- You will then be taken to the participant screen.
- To upload the forms, click on the "upload" button located near the top of the participant's record.
- Upload each file.
- Click "Update" at the bottom of the page when complete.

info@ilpathwaystohealth.org | (800)699-9043

How to Edit a Workshop

- Sign into the ILPTH Dashboard.
  www.ilpathwaystohealth.org
- Click the **"classes" tab**.
- Find the desired class, click "view" to access the class details.

- You will then be taken to the "Class Details" page.
- In the upper right-hand corner, click "Edit."

- You will then be taken to the "Edit Class" page. Edit all relevant information.

- Click "Update" at the bottom of the page when complete.