

# MyBuddy User Manual

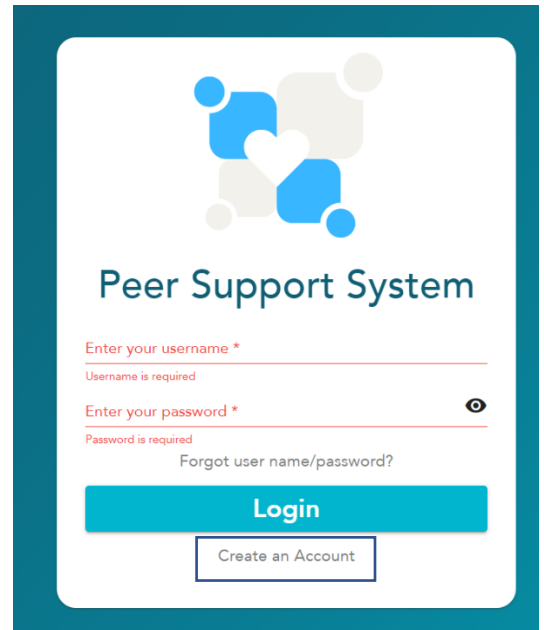
## Accounts

<b>Program Admin (The account has already been created in the system)</b>	<p>The program admin can approve or disapprove Peer Support Specialist (PSS) accounts. Without the approval, PSS cannot access the account they newly created.</p> <p>If a PSS stops using an account, program admin can disapprove the account so that no one can use that PSS account to access client information.</p>
<b>Peer Support Specialist (PSS)</b>	<p>PSS needs to create their own account. After the account is approved by the program admin, PSS can add new clients, enter information about clients, view and modify details for clients. PSS can only see the clients they add.</p>
<b>System Admin (The account has already been created in the system)</b>	<p>The system admin can see the information of all clients. They can download the forms in these clients' encounters as PDF files.</p>

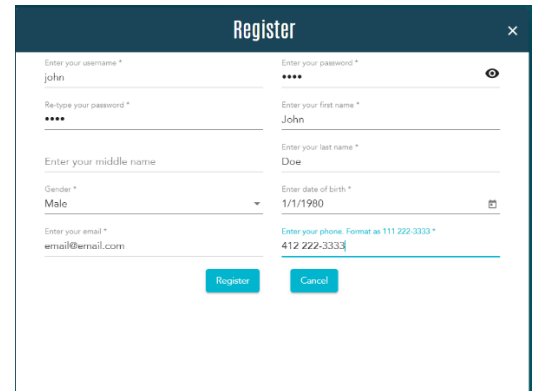
# PSS Account Creation

## Steps:

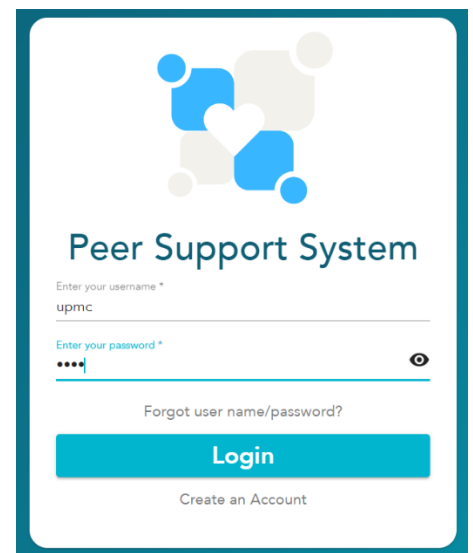
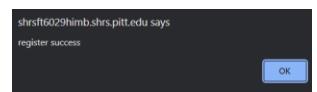
1. Go to the Wellness Pavilion site.
2. Click on **"Create an Account"** below the login button.
3. Fill out all information accurately.
4. Once all information is completed the **Register** button in the bottom left corner will turn blue.
5. Click on button.
6. If registration successful, a popup message will appear confirming.
7. Your account cannot be used until a program administrator approves it.
8. Once approved, you can type in your username and password to login.



The image shows the login interface for the Peer Support System. At the top is a logo with blue and grey abstract shapes. Below it, the title "Peer Support System" is displayed. There are two input fields: "Enter your username \*" with a red error message "Username is required" below it, and "Enter your password \*" with a red error message "Password is required" below it. A link "Forgot user name/password?" is positioned between the password field and the login button. The "Login" button is a large blue rectangle. Below it is a "Create an Account" button, which is a smaller white rectangle with a blue border.



The image shows the registration form for the Peer Support System. The title "Register" is at the top right. The form is divided into two columns. The left column contains: "Enter your username \*" with the value "john", "Re-type your password \*" with four asterisks, "Enter your middle name", "Gender \*" with a dropdown menu showing "Male", and "Enter your email \*" with the value "email@email.com". The right column contains: "Enter your password \*" with four asterisks, "Enter your first name \*" with the value "John", "Enter your last name \*" with the value "Doe", "Enter date of birth \*" with the value "1/1/1980", and "Enter your phone. Format as 111 222-3333 \*" with the value "412 222-3333". At the bottom are two buttons: "Register" (blue) and "Cancel" (white with blue border).



The image shows the login interface for the Peer Support System, similar to the first image. The "Login" button is a large blue rectangle. Below it is a "Create an Account" button, which is a smaller white rectangle with a blue border. The "Enter your password \*" field now has the value "upmc" and the "Forgot user name/password?" link is visible.

## Account Approval – Program Admin

1. Log in using your credentials for program admin
2. Either search for the name needing approval by first or last name or find the name by scrolling through account list
3. To approve the account, click the **blue check mark** to the left of the individual's name.
4. To reject click the **red x**

The status of the account will be marked in the "status" column.

Account List					
Status	First Name	Last Name	Gender	Email	Phone
approved	John	Doe	female	email@email.com	111 222-3333
rejected	admin	admin	male	admin@gmail.com	111 222-3333
rejected	Doe	Jhon	female	doejhon@gmail.com	231 222-2132
rejected	upmc	upmc	male	upmc@email.com	582 664-1302

# Client Account - PSS

1. **Login**
2. On the "Client List" section click on **"Add a Client"**. **Search and check whether the client is already in the system. If not, click 'Create New Client' to go to the next step.**
3. Fill out the demographics form for the new client
  - a. Note: First and last name is the minimum information needed to create a new client
4. Once all the information is in, click the blue **"Upload"** button at the bottom of the form to finish the creation of the client. The page is back to the client list.
5. To view the information of a client or add information for the client, click on **"View"** button or the icon to the left of the client's name. If one client is not working with you, you can click on "Remove" button to remove this client from your client list. The record of this client will not be removed from the system but it is not accessible to you (PSS)
6. To create an encounter, click button **"New Encounter"**
  - a. **Note: an encounter is needed before adding any information into forms**
7. Fill out the reason and date for Encounter and click **"Submit"**. The page will change to "Program Forms"

Please perform a search to determine whether this client is already in the system.

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

## Demographics

Avatar:

File Path: \_\_\_\_\_

### BASIC INFORMATION

\* First Name: \_\_\_\_\_

\* Last Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_

Date of Birth: mm/dd/yyyy ☐ Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Gender:

Race:

Do you consider yourself of Hispanic or Latino Origin?:

Personal Gender Pronouns:  other (please specify): \_\_\_\_\_

Prefix:  Other (please specify): \_\_\_\_\_

Search Client Name

# Program Forms – PSS

1. After a new encounter is created, the page switches to “Program Forms” tab. It has a list of forms: Community Service Note, Discharge Summary, Encounter Verification – Non DDAP Version, Initial Rehab Plan, Intake Note, and Strength-Based Assessment.
2. Click on the tab of the form, you can start to fill out the form. After you finish one form, click “Submit” to save the data into the database. The form with the entered content will also be shown in the encounter.

The screenshot shows the 'Program Forms' tab selected in a navigation bar. Below the navigation bar, there are several input fields for form data: 'Service Date', 'Start Time', 'End Time', 'Duration' (with a 'minutes' label), and 'Travel Time With Client' (with a 'minutes' label). Below these fields, there is a section for 'Location(s)' with a list of checkboxes: '1. Home', '2. Company Vehicle', '3. Office', '4. Phone', 'Community', and 'Other location(s)'.

## Encounters

The encounters page keeps track of past encounters for a client. All the encounters are shown in a list. Click on one of them, the content entered in the forms for one encounter will be shown. Click on the header line of the encounter again, the details of the encounter will be hidden again.

Encounters		Demographics	Program Forms
New Encounter			
Encounter Details			
11/15/22, 3:26 PM, Encounters, UPMC			
11/8/22, 2:37 PM, Check up, UPMC			
9/20/22, 12:59 PM, first medication, UPMC			
9/13/22, 4:14 PM, new visit, UPMC			
9/13/22, 11:19 AM, sadsadsdsds 21421 sadsa xz as w q21 421 sa sad sa, UPMC			

Click one entry of an encounter the details of the forms in the encounter will be shown:

Encounters

Demographics

Program Forms

New Encounter

Encounter Details

11/25/22, 4:47 PM, test, UPMC

Reason for Encounter:  
test

Edit

Community Service Note

Edit

Sign

Print Form Community Service Note

Nov 25, 2022, 4:48:02 PM

Community Service Note

Editor: upmc

Result: N/A

Service Date: 2022-11-16T05:00:00

Start Time: 2:00 PM

End Time: 3:00 PM

Duration: null

Travel Time With Client: null

Location(s): Phone


PSS can review the content of the chosen encounter. If any information is not correct, PSS can click “Edit” to load the data back into the corresponding form and make updates. If everything is correct, PSS can click “Sign” to sign the form. After the ‘Sign’ button is clicked, a new window will pop up and PSS can enter their name, date, and draw their signature. After the signature is saved by clicking the “save” button, one can click ‘Sign’ at the bottom to sign the form.

Sign

If everything is correct for this encounter, and you are ready to sign this encounter, please enter your name and the date. After you sign the encounter, it will not be changed any more.

Name: LZ

Date: 11/25/2022





Nov 25, 2022, 4:51:00 PM:

save

reset

Cancel


Sign

After the form is signed, it is shown at the bottom of the list of forms in the encounter, and the 'Edit' and 'Sign' buttons are disabled. PSS can click "Print Form (form name)" button to save the form into a PDF file.

#### Community Service Note

[Print Form Community Service Note](#)

Signed By: upmc  
Signed Timestamp: 2022-11-25T21:48:02.192+00:00



Nov 25, 2022, 4:48:02 PMCommunity Service NoteEditor: upmcResult: N/A

Service Date: 2022-11-16T05:00:00

Start Time: 2:00 PM

End Time: 3:00 PM

Duration: null

Travel Time With Client: null

Location(s): Phone

Community: null

Other location(s): null

Activity Type: Face to face

PSS can also edit the reason for the encounter by clicking 'Edit' button for the entire encounter.

## Demographics

The demographics tab is where all the basic information about client is stored.

EncountersDemographicsProgram Forms

### BASIC INFORMATION

\* First Name: new

\* Last Name: patientMiddle Name:

Date of Birth: 08/25/2022Phone: 421421

Email:Gender: Female

Race: Select

Do you consider yourself of Hispanic of Latino Origin?: Select

Personal Gender Pronouns: Selectother (please specify):

Prefix: SelectOther (please specify):

### ADDRESS INFORMATION

Address 1: pitss

Address 2: pittts

City: pittsburghState: Pennsylvania

Zipcode: 15121

## System Admin

The only difference between system admin and PSS account is that system admin can see all client's information, not just the clients served by one specific PSS. PSS can only see the clients they created. System

admin can access all clients and their encounters. They can download the forms in individual encounters as PDF files.