MyBuddy User Manual

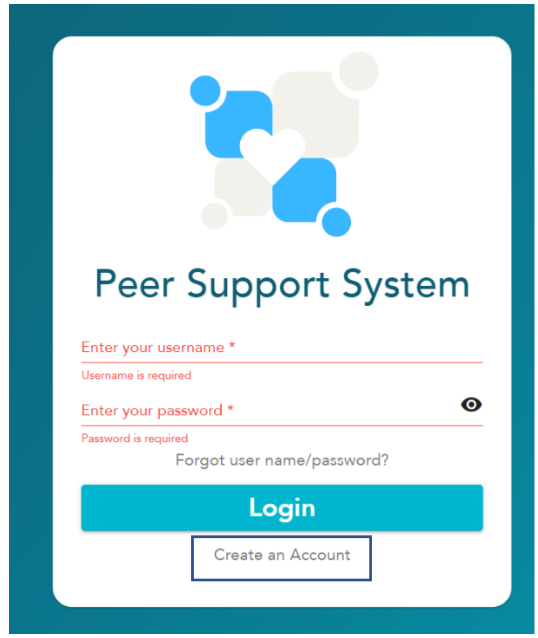
Accounts

Program Admin (The account has already been created in the system)	The program admin can approve or disapprove Peer Support Specialist (PSS) accounts. Without the approval, PSS cannot access the account they newly created. 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.
Peer Support Specialist (PSS)	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.
System Admin (The account has already been created in the system)	The system admin can see the information of all clients. They can download the forms in these clients' encounters as PDF files.

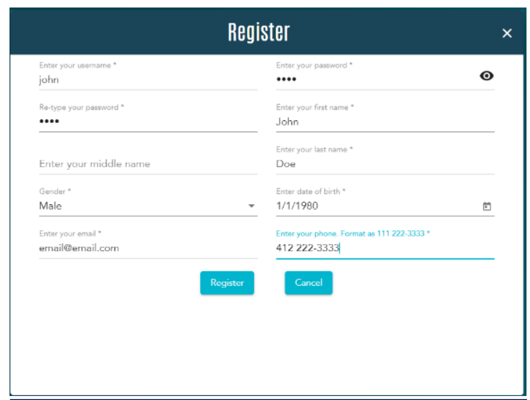
PSS Account Creation

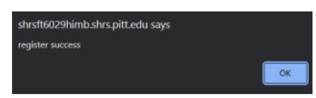
Steps:

1. Go to the Wellness Pavilion site.
2. Click on **"Create an Account"** below the login button.

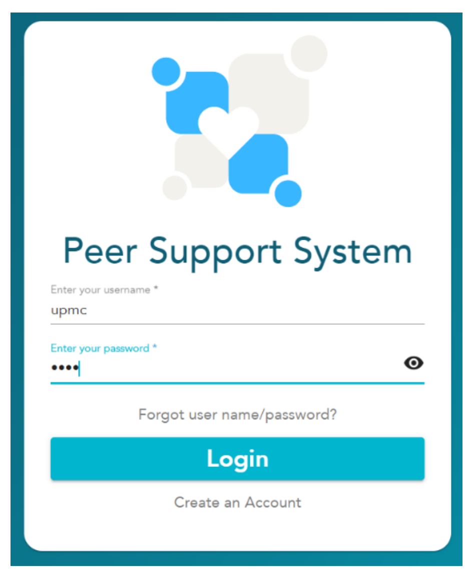


3. Fill out all information accurately.
4. Once all information is completed the **Register** button in the bottom left corner will turn blue.
5. Click on button.

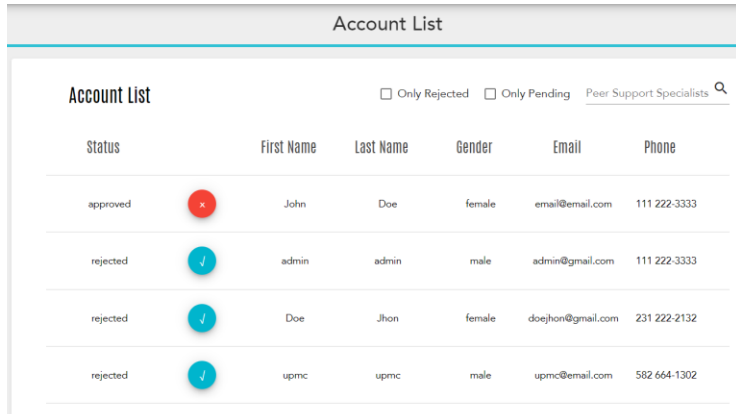




6. If registration successful, a popup message will appear confirming.
7. Your account cannot be used until a program administrator approves it.
8. Once approved, you can type in your username and password to login.



Account Approval – Program Admin



1. Log in using your credentials for program admin

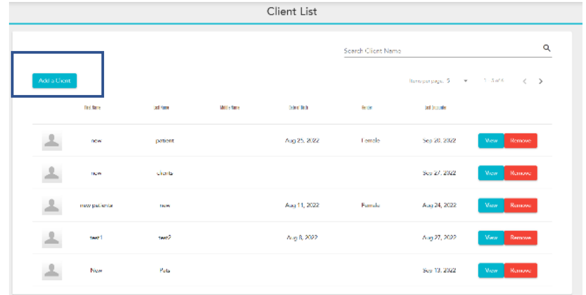
2. Either search for the name needing approval by first or last name or find the name by scrolling through account list

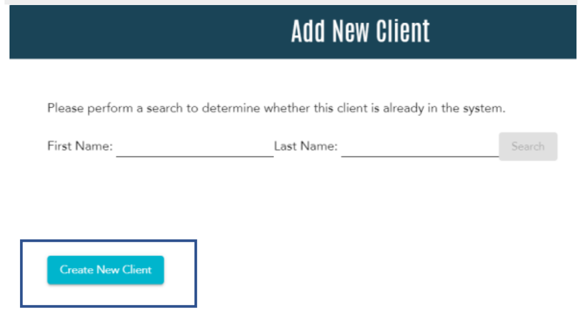
3. To approve the account, click the **blue check mark** to the left of the individual's name.
4. To reject click the **red x**

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

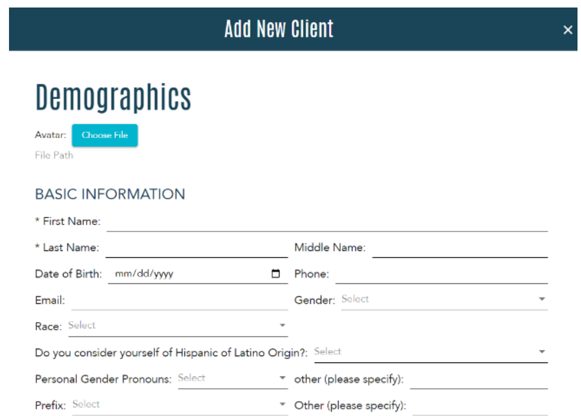
Client Account - PSS

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.**

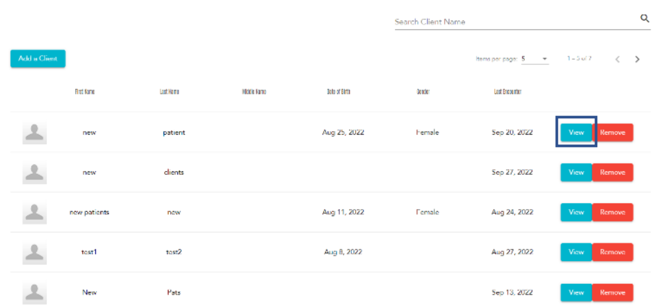




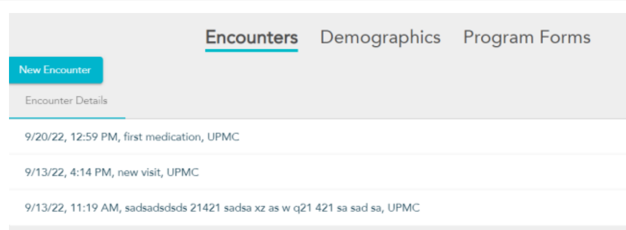
3. Fill out the demographics form for the new client
    a. Note: First and last name is the minimum information needed to create a new client
4. Once all the information is in, click the blue "**Upload"** button at the bottom of the form to finish the creation of the client. The page is back to the client list.

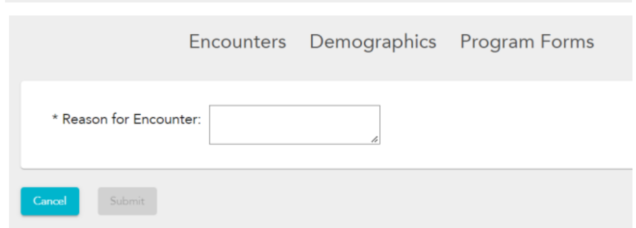


5. To view the information of a client or add information for the client, click on "**View"** button or the icon to the left of the client's name. If one client is not working with you, you can click on "Remove" button to remove this client from your client list. The record of this client will not be removed from the system but it is not accessible to you (PSS)



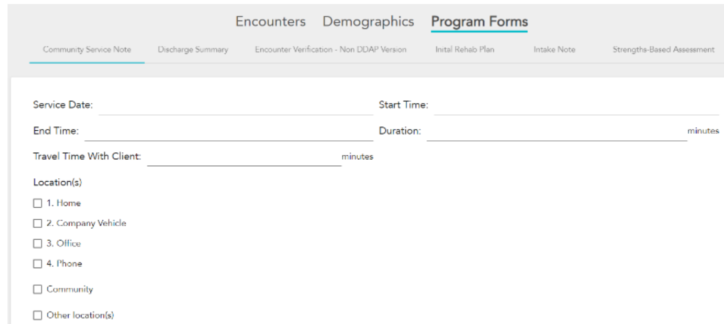
6. To create an encounter, click button "**New Encounter"**
    a. **Note: an encounter is needed before adding any information into forms**
7. Fill out the reason and date for Encounter and click "**Submit".** The page will change to "Program Forms"





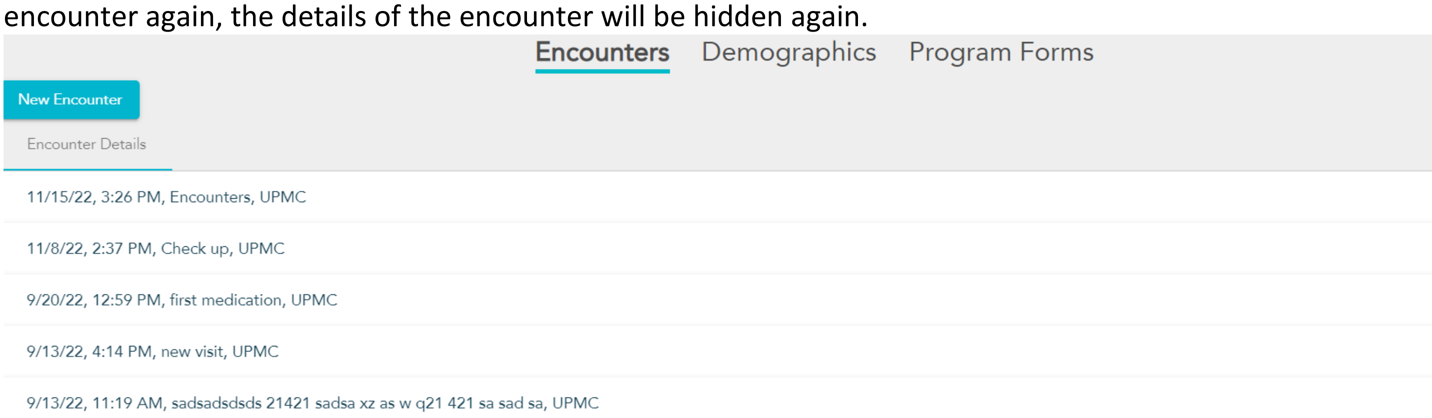
Program Forms – PSS

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.

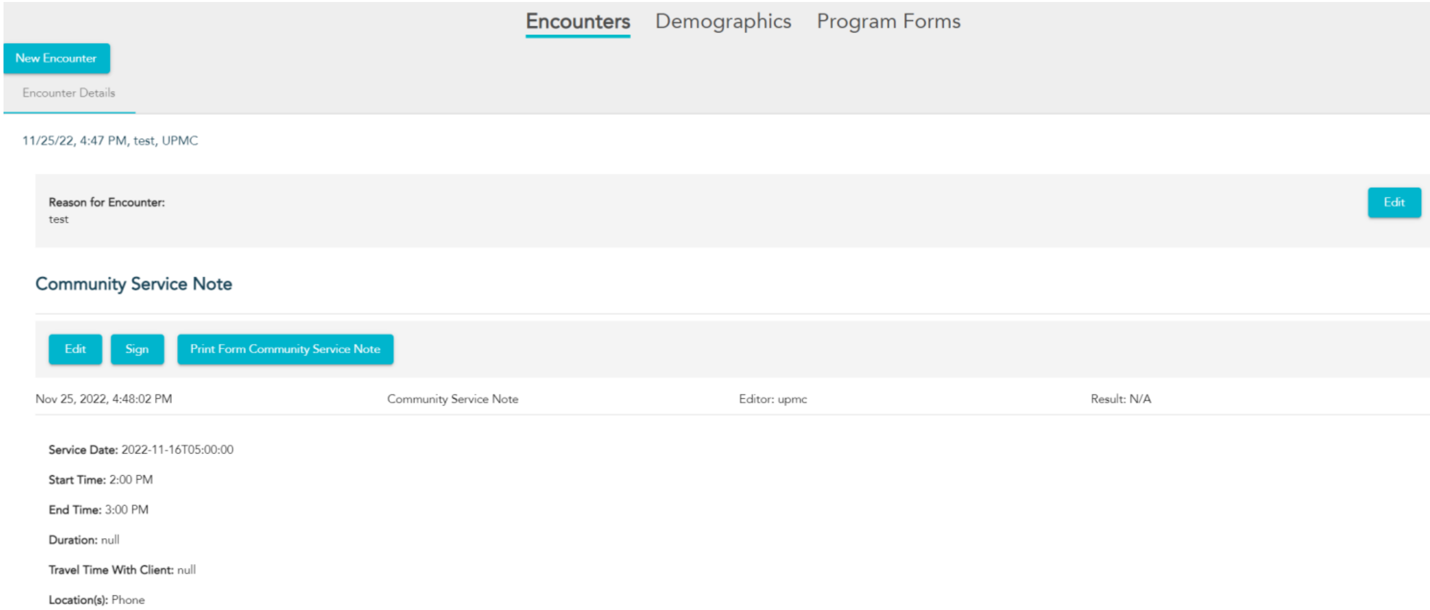


Encounters

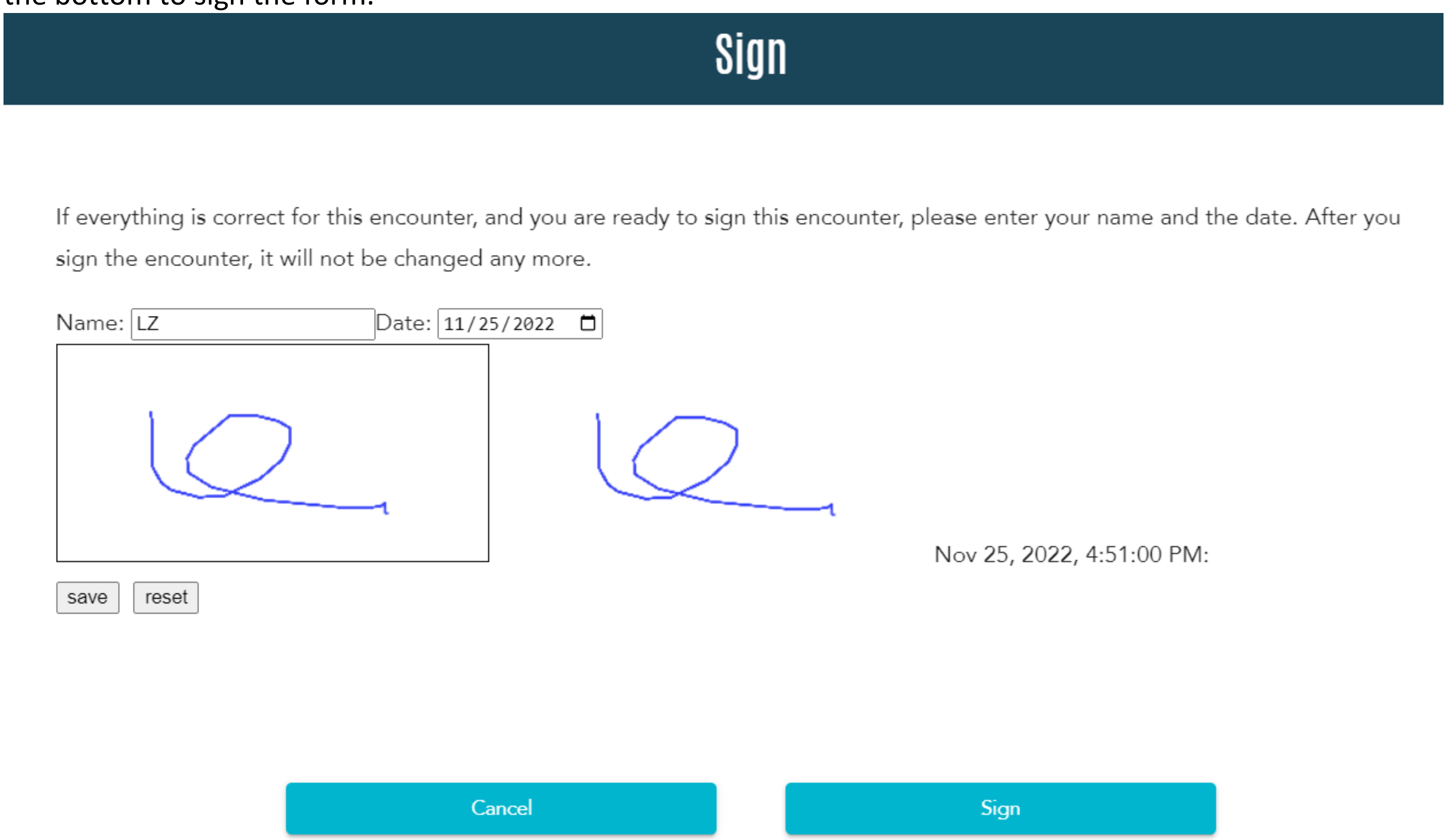
The encounters page keeps track of past encounters for a client. All the encounters are shown in a list. Click on one of them, the content entered in the forms for one encounter will be shown. Click on the header line of the encounter again, the details of the encounter will be hidden again.



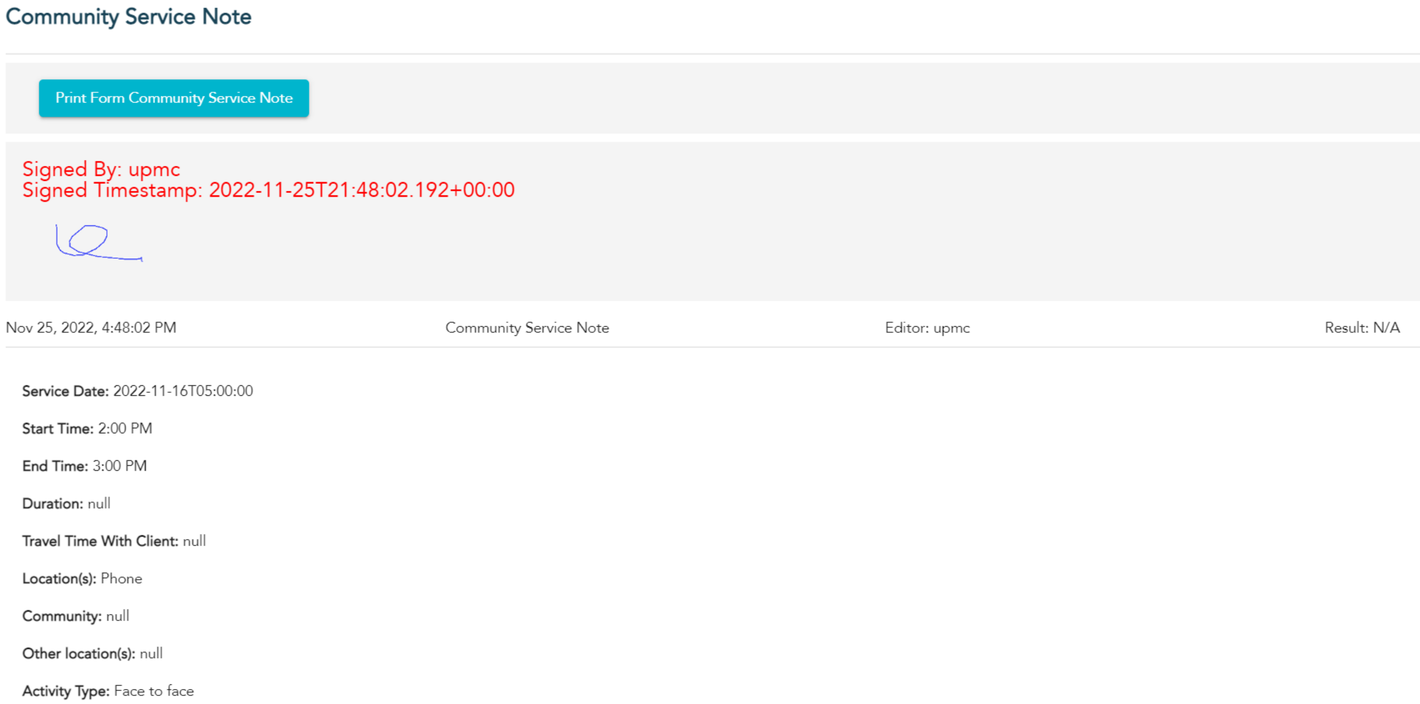
Click one entry of an encounter the details of the forms in the encounter will be shown:



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.



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 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

Community: null

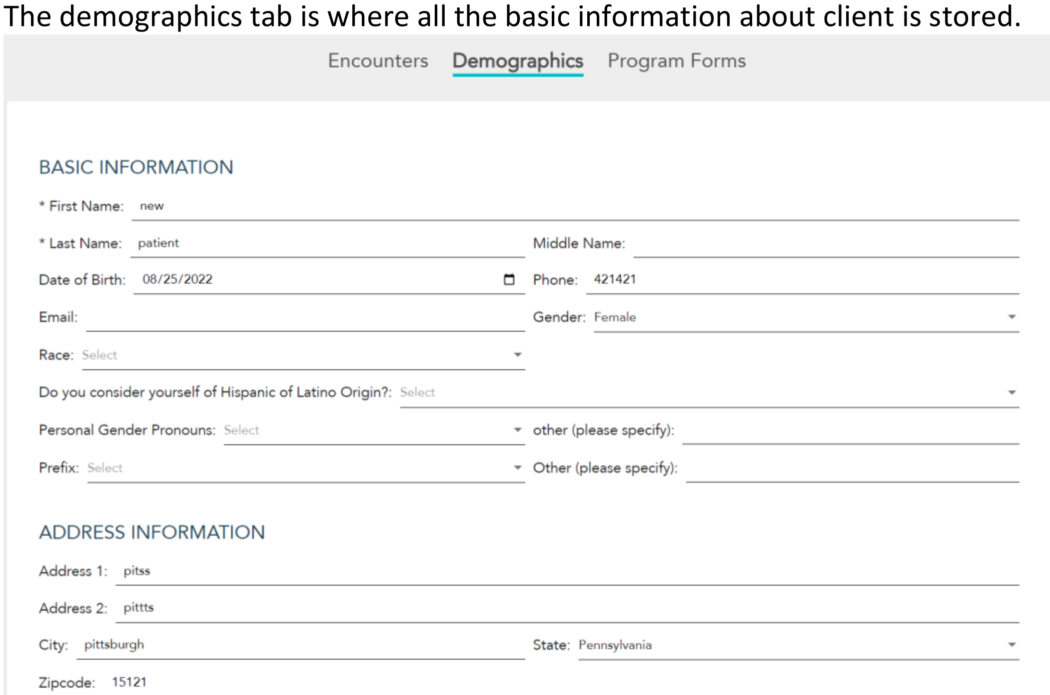
Other location(s): null

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.


Encounters Demographics Program Forms

BASIC INFORMATION

* First Name: new

* Last Name: patient | Middle Name:

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

Email: | Gender: Female

Race: Select

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

Personal Gender Pronouns: Select | other (please specify):

Prefix: Select | Other (please specify):

ADDRESS INFORMATION

Address 1: pitss

Address 2: pittts

City: pittsburgh | State: 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.