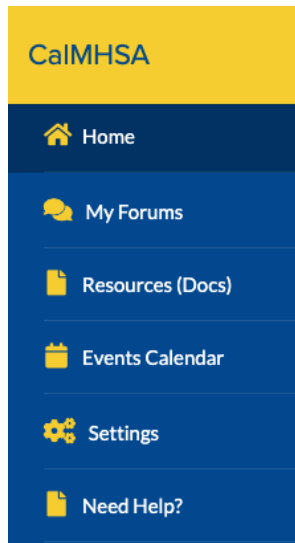


PEI Stakeholder Forum User Guide

Registration Process

1. You will receive an invite email from CalMHSA with a link to the registration page.
<https://CalMHSAPeIForum.org/pei-registration/>
2. On the site, you will need to input the password **pei** in order to register for an account.
3. To create an account, fill out the PEI Community Forum Registration page, including your desired Username and Password, and submit.
 - o Note: once your Username is selected and saved you will not be able to change it.
4. You will receive a welcome email after registration. This email may go to your junk or spam folder so be sure to check there if you don't see it in your inbox.
5. You will be added to your Forum Group within 48 hours after registering. Please email the Help Desk if you have not gained access to your group after 48 hours.
6. You can now access the site at this link: <https://CalMHSAPeIForum.org/>

Getting Started



1. Read the statement on the “Home” page. This will give you a brief orientation of the site. The next section of this document has a full breakdown of all features on the site.

2. Click on the “My Forums” tab. This is the landing page for all forum content. Click on “Groups” to see the group you are assigned to. **You will be added to a group within 48 hours after registering.** If you are not assigned to any groups after this point, please email the help desk on the “Need Help?” tab.



3. Once you are assigned to the appropriate group, click on the name of the group to see mutual members, forum posts, documents, and events. In order to receive email notifications for new forum posts, you will need to “subscribe” to your group. You can do this by clicking on the group name, selecting “Forum”, and clicking the “Subscribe”

button. **If you do not subscribe to your groups, you will not receive notifications when important announcements are posted on the forum.**

HOME FORUM DOCS EVENTS 0 MANAGE

Private: Behavioral Health Directors



4. If at any point you have questions about the PEI forum or difficulty accessing its features, please contact our helpdesk. The email is available at the “Need Help?” tab.

Page by Page Breakdown

My Forums Tab:

PROFILE NOTIFICATIONS 0 GROUPS 11 FORUMS EVENTS DOCS 0 SETTINGS

- **Profile:** Here is your profile page! Your name is displayed as shown on the forum when you create or engage with a forum post.
- **Notifications:** Here are notifications for your forums. Make sure you are subscribed to all your groups so you can get notifications for forum posts! You can tab between read and unread posts and view by newest first or oldest first.
- **Groups:** Engage with folks on mental health topics by starting a new forum post or responding to others' posts! You can create a forum post by choosing the group you want to post in and going to "Forum". All forum posts are aggregated in the “My Forums” tab. You will be added to a group within 48 hours after registering. Make sure you are subscribed to all your groups so you can get notifications.
 - Membership: All of the groups you are currently a member of are shown here.
 - Invitations: Any of the groups that you have been invited to, but are not a member of yet, are shown here.
 - Events: Any events that have been added to any groups you are a member of are shown here.
- **Forums:** The Forums page is an aggregate of all forum posts you have created. Here you can view replies and see all your group subscriptions.
 - Topics Started: This is where you can find any forums started within the groups you are a part of.
 - Replies Created: This is where any forums that you reply to are listed.
 - Engagements: This is where any forums you have engaged with are listed.

- Favorites: Any forum topics you favorite are stored here.
- Subscriptions: This is where any groups you are subscribed to are listed. We suggest that you subscribe to all your groups to get notifications on any new forum posts.
- **Events**: Here is the Events page where you can find events you have created and events you are attending.
 - My Profile: This is your public page where other users can see what events you are attending.
 - Events I'm Attending: This is a list of events you have registered for.
 - My Events: Any events that you create on the stakeholder forum will show up here. You can create an event by clicking "Add New." If the event is paid or limited capacity, you can use the Bookings/Registration button to sell tickets for the event. After you submit your event, an administrator will approve the event.
 - My Locations: This lists the different locations events have been scheduled.
 - My Event Bookings: Any events that you have signed up for will show up on this page.
- **Docs**: Here is your personal Docs page. You can store documents here and view documents you have edited. You can create a new document by clicking "Create New Doc".
- **Settings**: Here you can manage your settings! You can edit email notifications by selecting "Email" or request a personal data export. If needed, you can change your password on this page.

Resources (Docs) Tab:

- **About the PEI Campaign**: This page contains documents that tell you more about the PEI campaign that Civilian and CalMHSA are currently working on. Documents tagged with *about-the-pei-campaign* will show up here.
- **Foundational Work**: This page contains documents that have been foundational to our work on the social marketing campaign. Documents tagged with *foundational-work* will show up here.
- **Upcoming Work Groups**: CalMHSA and Civilian are holding workgroups with experts to facilitate the creation of materials for the campaign. Information about the workgroups will show up here if they are tagged with *upcoming-workgroups*.
 - All Docs: Here are all the documents you have access to from your groups. You can filter by attachments and tag and search through documents on this page.
 - Started by Me: These are any of the documents you have personally uploaded.
 - Edited by Me: Any documents you have edited will show up here.
 - My Groups: Documents associated with your groups will be listed here.
 - Create New Doc: Click "Create New Doc" to upload a file. You will have control over who can access the file and be able to comment on it. You can also tag it with keywords to categorize it.

Events Calendar Tab

- Any events that you are attending on the stakeholder forum will show up here. You can create an event by clicking “Add New”. If the event is paid or limited capacity, you can use the Bookings/Registration button to sell tickets for the event. After you submit your event, an administrator will approve the event.

Settings Tab



- Here you can manage your settings! You can edit email notifications by selecting "Email" or request a personal data export. If needed, you can change your password on this page.

Need Help Tab

- If you are running into problems or need special help with the CalMHSA Stakeholder Forum, please send an email to peiforumhelp@calmhsa.org and we will get back to you as soon as possible.