

# Getting Started – A Demonstration on the MSTI Website

It is not possible to cover everything someone needs to know about the website in this initial training. We will focus on providing you with an opportunity to ask questions and see how to navigate the website so you can explore on your own. The most important points will be covered here. It is important that you review and become familiar with the FAQs, as many procedures and questions that you may have are included there. I will provide a copy of those and you can also find them on the homepage of [msti.org](http://msti.org).

Before we begin, please take a minute to review the below overview of the homepage on [msti.org](http://msti.org). Save this site on your favorites for ready access to all the resources here.

## The MSTI Website Homepage ([msti.org](http://msti.org))

If you explore the main menu, you will see links to important information, forms and resources. Please make sure that you review these, as they provide helpful tips and guidelines pertaining to QA, TAM-Rs and SAMs.

The screenshot shows the MSTI website homepage. On the left, there is a 'SITE LOGIN' section with links for 'Login' and 'Mobile Dashboard'. The main header features the 'MST Institute' logo and a navigation menu with links for 'About MST Institute', 'Services', 'QA Program', and 'Contact MSTI'. A woman is standing in front of a bookshelf in the background. Two blue callout boxes provide additional information: one on the left explains the 'Site Selection Menu' and another on the right explains the 'Main Menu'.

**The Site Selection Menu** provides a link to each of our website login pages. You should always be entering client data on the MSTI Website.

**The Main Menu** categorizes and organizes important information, forms and resources. Please make sure to review this information.

## Login Process - MSTI Website:



### ***Initial Login***

Always make sure to select "Secure Site" when logging into the MSTI website. The "Demo Site" is only used for trainings and demonstrations and will not take your MSTI login.

Please review the 'Managing Users' training guide, to learn how to add users, or have users added to the MSTI website. It can be found here:

<https://msti.org/mstinstitute/services/training.html>

When a user is added to the website, the system will automatically send 2 emails to that user (to the email address that was entered in their account). The user should receive these emails within 1 hour of the time that they were entered into the system. One email will contain a username, and the other will contain separate information to confirm your account and set up your password. The user should immediately login and change the password (see section below). Make sure to keep the login information secure, as this allows access to your data!

A valid email address is required. **Users cannot use the MSTI website without a working email address and they should not be setup on the site, until they have a working email address at your organization.** Organizations that do not provide email to their staff will need to make sure that anyone that will be using the website sets up a personal email account (ex: Gmail). Please make note that personal email accounts may give the user less control over what mail is considered spam/junk. Users that have accounts with Yahoo, AOL, Hotmail, etc. may not receive any email from our system, due to automatic blocking of all system generated emails. In addition, personal email accounts are not as secure as email accounts that are managed and monitored by your organization's IT staff. For this reason, we strongly suggest that you use your office email addresses, or a more secure, personal email account such as Gmail. You may have to initially check your junk folder in that account, for the emails from our system and specify that they are 'Not Junk', so you will receive them in the future.

## Privacy Policy

Upon logging in for the first time, users will see the privacy policy for the MST Institute. MSTI is dedicated to maintaining a high level of security and privacy practices for all data housed on our websites. We are committed to following all necessary procedures to ensure we are compliant with the most stringent international data security standards, thus insuring that MSTI is both HIPPA and GDPR compliant. In order to access the site, the privacy policy must be accepted. If you choose to not accept this policy and the way MSTI stores your information, you will need to work with your supervisor to create a plan to meet your job responsibilities without using our website. For further questions, please reach out to the MSTI Helpdesk at [msti@mstinstitute.org](mailto:msti@mstinstitute.org).

### Changes to the Terms of This Notice

We can change the terms of this notice, and the changes will apply to all information we have. The new notice will be available upon request on our web site.

### GDPR Compliance

In compliance with the GDPR Principles, MST Institute commits to resolve complaints about our collection or use of personal information. European Union individuals with inquiries or complaints regarding this privacy policy should first contact MST Institute at: [msti@mstinstitute.org](mailto:msti@mstinstitute.org).

Last Update: January 11, 2021

**By continuing to use this website, you consent to the use of your data, including cookies, as described in our "Privacy Policy" above**

## Change Password and Update Profile

Once on the main page, users will see a main menu, where they can select '**Change Password**', to automatically change their password.

They will also see a selection to '**Update Profile**'. This selection will allow them to update their first and last names, username, or email address. **It is extremely important that they provide us with an updated email address if it changes.**

Click here to change your password.

Click here to update your name, username, or email address.

ID	Form Name	Add	View / Edit
600	Edit Cases Referred Prior to 01/02/2007		<a href="#">View / Edit</a>
6	Case Enrollment Form	<a href="#">Add</a>	<a href="#">View / Edit</a>
30	CSSD Case Enrollment Form		<a href="#">View / Edit</a>
20	Case Discharge Form	<a href="#">Add</a>	<a href="#">View / Edit</a>

To change your password, simply click the 'Change Password' link shown above. You will be asked to enter the new password twice and you will need to follow the password rules to the right of the screen (shown below). Click 'Continue' and the system will automatically email the new password to you at the email address that we have in our system.

Karen Benson [ Logout ]

MST INSTITUTE Enhanced Web Site

Home | Change Password | Update Profile | Evidence Based Assoc Dashboard | Help

### Change Password

Username kbwebmstr

New Password

Confirm Password

Show Password

- > Passwords must be 6 characters or more.
- > Passwords must contain at least one letter and one number.
- > Passwords cannot match your username.

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To update your profile, simply click the 'Update Profile' link shown above. Your existing profile information will be displayed (see screenshot below). You are able to edit any of the information on that screen and it will update all records in our system. Phone number is currently listed as a required field; however, you may simply put 'n/a' in that field to be able to save any changes you make. Phone number is no longer required.

Karen Benson [ Logout ]

MST INSTITUTE Enhanced Web Site

Home | Change Password | Update Profile | Evidence Based Assoc Dashboard | Help

### Update Profile

\* Username kbwebmstr

Password To change your password, please visit the [Change Password](#) page.

Security Questions To change your security questions, please visit the [Change Security Questions](#) page.

\* First Name Karen

\* Last Name Benson

\* Email Address karen.benson@mstinstitut

\* Phone n/a

Cell Phone

Pager

Fax

> **Update Profile:**  
Please Update your user profile with all the necessary, valid information.

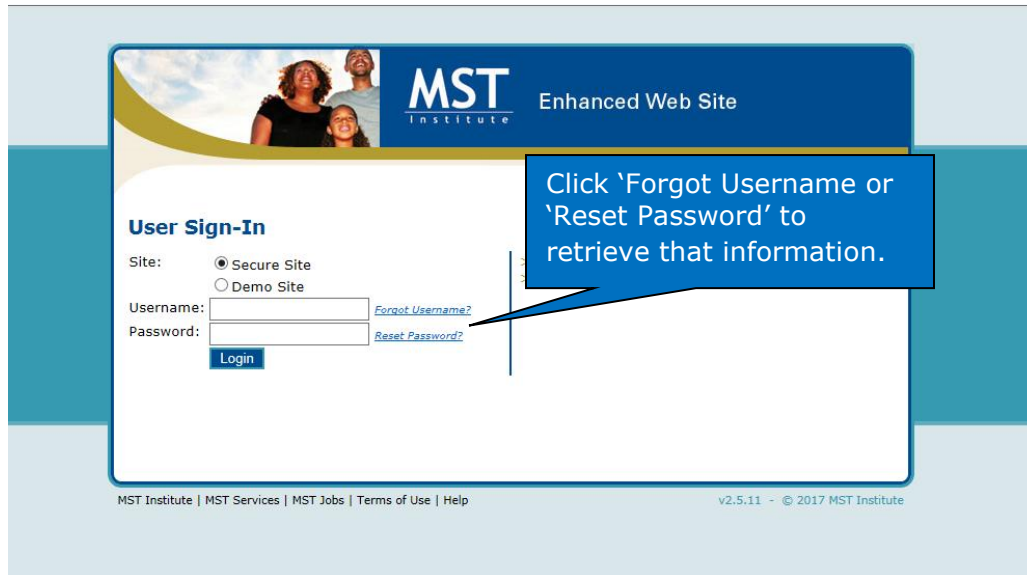
\* Denotes a required field.

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## Forgotten Username or Password

The 'Forgot Username' and 'Reset Password' are now built-in functions of the website. Users can go to the login page and select 'Forgot Username' or 'Reset Password'.

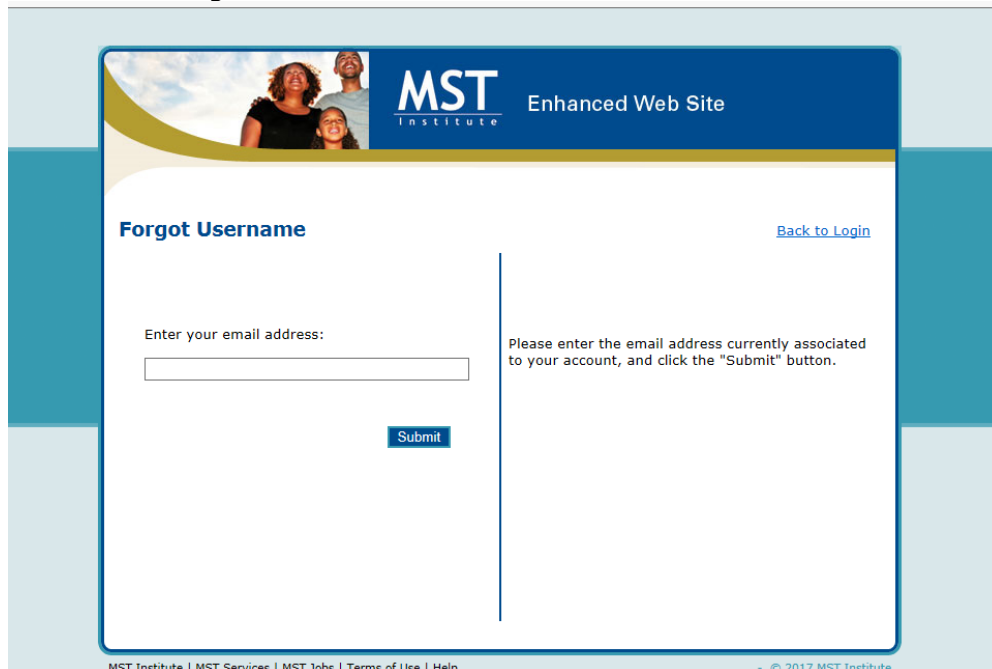
Screen #1: Forgotten Login



The screenshot shows the MST Institute login page. At the top, there is a header with the MST Institute logo and the text "Enhanced Web Site". Below the header, there is a "User Sign-In" section. It includes a "Site:" dropdown menu with "Secure Site" selected and "Demo Site" as an option. There are input fields for "Username:" and "Password:". Next to the "Username:" field is a link labeled "Forgot Username?". Next to the "Password:" field is a link labeled "Reset Password?". A blue callout box with a pointer to the "Forgot Username?" link contains the text: "Click 'Forgot Username or 'Reset Password' to retrieve that information." Below the input fields is a "Login" button. At the bottom of the page, there is a footer with the text "MST Institute | MST Services | MST Jobs | Terms of Use | Help" and "v2.5.11 - © 2017 MST Institute".

Users will then be taken to the specified screen, based on the selection they made above. **The information is immediately sent to the email address that we have on file, so it must be a working, accessible email address.**

Screen #2: Forgot Username

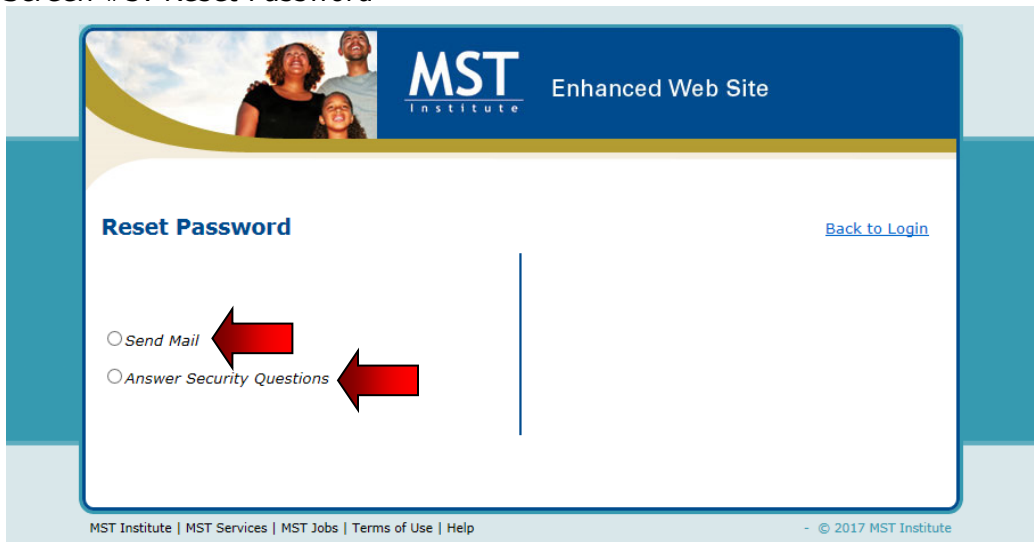


The screenshot shows the MST Institute "Forgot Username" page. At the top, there is a header with the MST Institute logo and the text "Enhanced Web Site". Below the header, there is a "Forgot Username" section. It includes a "Back to Login" link in the top right corner. There is a text input field labeled "Enter your email address:". Below the input field is a "Submit" button. To the right of the input field, there is a message: "Please enter the email address currently associated to your account, and click the 'Submit' button." At the bottom of the page, there is a footer with the text "MST Institute | MST Services | MST Jobs | Terms of Use | Help" and "© 2017 MST Institute".

On the "Reset Password" option, an email is sent to the user with a link to confirm their identity. That link is only active for the time stated in the email, so the user will have to go back through the process to reset the password again, should the link expire prior to them clicking it and confirming the account. **Again, the information is immediately sent to the email address that we have on file, so it must be a working, accessible email address.**

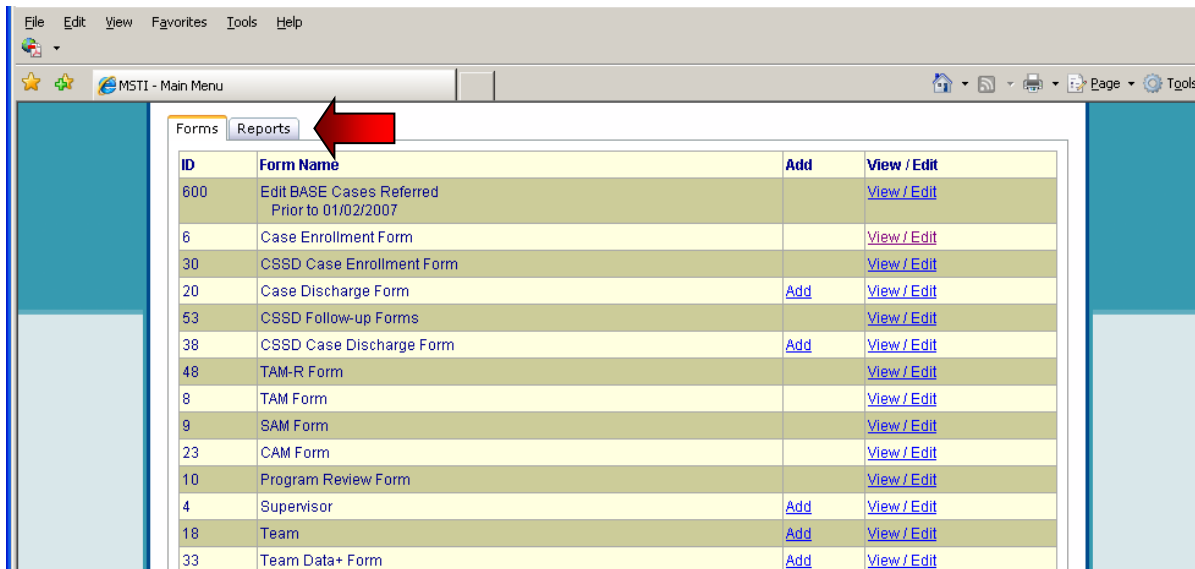
You will also have the option to "Answer Security Questions" that you previously set up. If you have not set them up, or do not remember your questions and answers, you need to use the "Send Mail" option.

### Screen #3: Reset Password



## Navigation and Features on the MSTI Website

Forms and Reports on separate tabbed menus.



Simple navigation... selections are 'Add', or 'View/Edit' for forms.

ID	Form Name	Add	View / Edit
600	Edit BASE Cases Referred Prior to 01/02/2007		<a href="#">View / Edit</a>
6	Case Enrollment Form		<a href="#">View / Edit</a>
30	CSSD Case Enrollment Form		<a href="#">View / Edit</a>
20	Case Discharge Form	<a href="#">Add</a>	<a href="#">View / Edit</a>
53	CSSD Follow-up Forms		<a href="#">View / Edit</a>
38	CSSD Case Discharge Form	<a href="#">Add</a>	<a href="#">View / Edit</a>
48	TAM-R Form		<a href="#">View / Edit</a>
8	TAM Form		<a href="#">View / Edit</a>
9	SAM Form		<a href="#">View / Edit</a>
23	CAM Form		<a href="#">View / Edit</a>
10	Program Review Form		<a href="#">View / Edit</a>
4	Supervisor	<a href="#">Add</a>	<a href="#">View / Edit</a>
18	Team	<a href="#">Add</a>	<a href="#">View / Edit</a>
33	Team Data+ Form	<a href="#">Add</a>	<a href="#">View / Edit</a>

Clicking on "View/Edit" will produce a List of all the records for the selected form that the user is entitled to see with their user privileges.

The data in the List can be exported directly into Excel and Word. This action will export only what is on the screen. To export long lists first click "View all" or change Page Size to a large number.

16 record(s) found. [View All](#) Page Size

Click on a column header to sort by that field

No.	Case ID	Organization	Team	Research Group	Supervisor	Consultant/System Supervisor	Therapist	Youth Name	Date of Referral (mm/dd/yyyy)	First Visit Date (mm/dd/yyyy)	Caregiver Name	Caregiver Phone Number	Local Case ID (optional)	Ac
1	2394	TEST123	Team 2 (CSSD)	Z	Organization Supervisor (BASE)	Consultant/System Supervisor (BASE)	Organization Therapist (BASE)	Youth 1	9/1/2005	9/3/2005	Mother			Nc
2	6813	TEST123	Team 2 CSSD	NS	Organization Supervisor (CSSD)	Consultant/System Supervisor (CSSD)	Organization Therapist (CSSD)	Youth 2	6/10/2005	6/10/2005	Grandmother			Nc
3	6918	TEST123	Team 3 COMU	NS	Organization Supervisor (COMU)	Consultant/System Supervisor (COMU)	Organization Therapist (COMU)	Youth 3	8/7/2005	8/20/2005	Aunt			Nc
4	13873	TEST123	Team 4 BPLS	NS	Testing Sup	Consultant/System Supervisor (BPLS)	Organization Therapist (BPLS)	Youth 4	10/1/2005	10/9/2005	Uncle			Ye
5	17087	TEST123	Team 3	NS	Organization	Consultant/System	Organization	Youth	9/1/2005	9/1/2005	Kim Mothers			Nc

Sort records with ease by clicking on the column header

Filters (1) + Add a Filter Print This Page Export to Excel Export to Word

16 record(s) found. (View All) Page Size

Click on a column header to sort by that field

No.	Case ID	Organization	Team	Research Group	Supervisor	Consultant/System Supervisor	Therapist	Youth Name	Date of Referral (mm/dd/yyyy)	First Visit Date (mm/dd/yyyy)	Caregiver Name	Caregiver Phone Number	Local Case ID (optional)	Is Active
1	2394	TEST123	Team 2 (CSSD)	Z	Organization Supervisor (BASE)	Consultant/System Supervisor (BASE)	Organization Therapist (BASE)	Youth 1	9/1/2005	9/3/2005	Mother			No
2	6813	TEST123	Team 2 CSSD	NS	Organization Supervisor (CSSD)	Consultant/System Supervisor (CSSD)	Organization Therapist (CSSD)	Youth 2	6/10/2005	6/10/2005	Grandmother			No
3	6918	TEST123	Team 3 COMU	NS	Organization Supervisor (COMU)	Consultant/System Supervisor (COMU)	Organization Therapist (COMU)	Youth 3	8/7/2005	8/20/2005	Aunt			No
4	13873	TEST123	Team 4 BPLS	NS	Testing Sup	Consultant/System Supervisor (BPLS)	Organization Therapist (BPLS)	Youth 4	10/1/2005	10/9/2005	Uncle			Yes

Simplified Filtering

Filters (1) + Add a Filter Print This Page Export to Excel Export to Word

16 record(s) found. (View All) Page Size

Click on a column header to sort by that field

No.	Case ID	Organization	Team	Research Group	Supervisor	Consultant/System Supervisor	Therapist	Youth Name	Date of Referral (mm/dd/yyyy)	First Visit Date (mm/dd/yyyy)	Caregiver Name	Caregiver Phone Number	Local Case ID (optional)	Is Active
1	2394	TEST123	Team 2 (CSSD)	Z	Organization Supervisor (BASE)	Consultant/System Supervisor (BASE)	Organization Therapist (BASE)	Youth 1	9/1/2005	9/3/2005	Mother			No
2	6813	TEST123	Team 2 CSSD	NS	Organization Supervisor (CSSD)	Consultant/System Supervisor (CSSD)	Organization Therapist (CSSD)	Youth 2	6/10/2005	6/10/2005	Grandmother			No
3	6918	TEST123	Team 3 COMU	NS	Organization Supervisor (COMU)	Consultant/System Supervisor (COMU)	Organization Therapist (COMU)	Youth 3	8/7/2005	8/20/2005	Aunt			No
4	13873	TEST123	Team 4 BPLS	NS	Testing Sup	Consultant/System Supervisor (BPLS)	Organization Therapist (BPLS)	Youth 4	10/1/2005	10/9/2005	Uncle			Yes

Filters (1) + Add a Filter Print This Page Export to Excel Export to Word

16 record(s) found. (View All) Page Size

Click on a column header to sort by that field

**Add a Filter** Close X

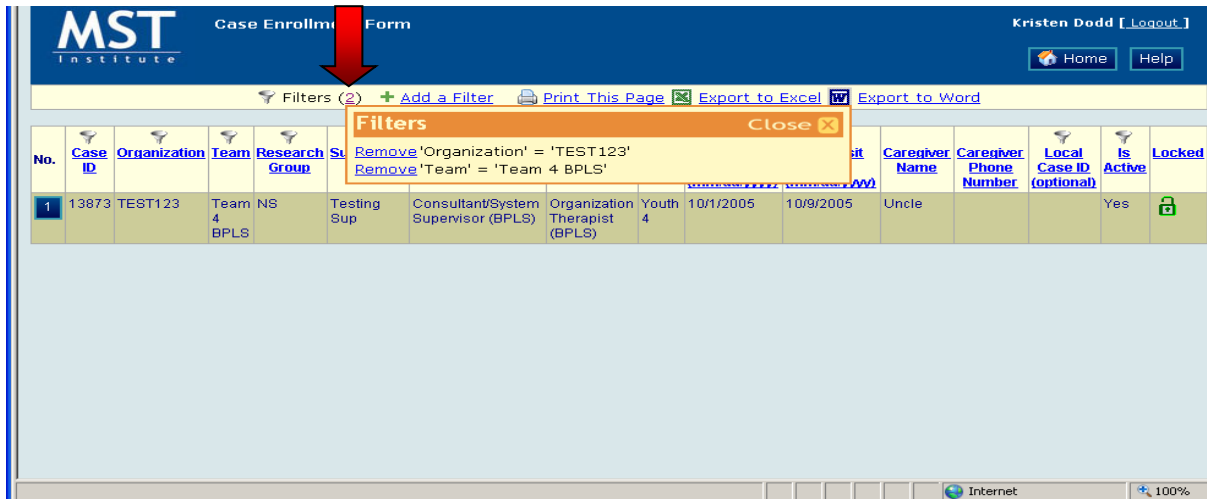
Filter By:

Select a Value:

No.	Case ID	Organization	Team	Research Group	Supervisor	Consultant/System Supervisor	Therapist	Youth Name	Date of Referral (mm/dd/yyyy)	First Visit Date (mm/dd/yyyy)	Caregiver Name	Caregiver Phone Number	Local Case ID (optional)	Is Active
1	2394	TEST123	Team 2 (CSSD)	Z	Org Sup (BA)	Consultant/System Supervisor (BASE)	Organization Therapist (BASE)	Youth 1	9/1/2005	9/3/2005	Mother			No
2	6813	TEST123	Team 2 CSSD	NS	Organization Supervisor (CSSD)	Consultant/System Supervisor (CSSD)	Organization Therapist (CSSD)	Youth 2	6/10/2005	6/10/2005	Grandmother			No
3	6918	TEST123	Team 3 COMU	NS	Organization Supervisor (COMU)	Consultant/System Supervisor (COMU)	Organization Therapist (COMU)	Youth 3	8/7/2005	8/20/2005	Aunt			No
4	13873	TEST123	Team 4 BPLS	NS	Testing Sup	Consultant/System Supervisor (BPLS)	Organization Therapist (BPLS)	Youth 4	10/1/2005	10/9/2005	Uncle			Yes



Easily remove filters by clicking on the number in ( ) and then clicking "Remove"



## Demonstration on Using the MSTI Website (Adding, Editing and Listing Forms)

For today's training, we will be logging in as a System Manager and looking at the menus, forms and reports available to that user. This is the user with the highest level of access in the organization.

*We will log in as a System Manager on the DEMONSTRATION site.*

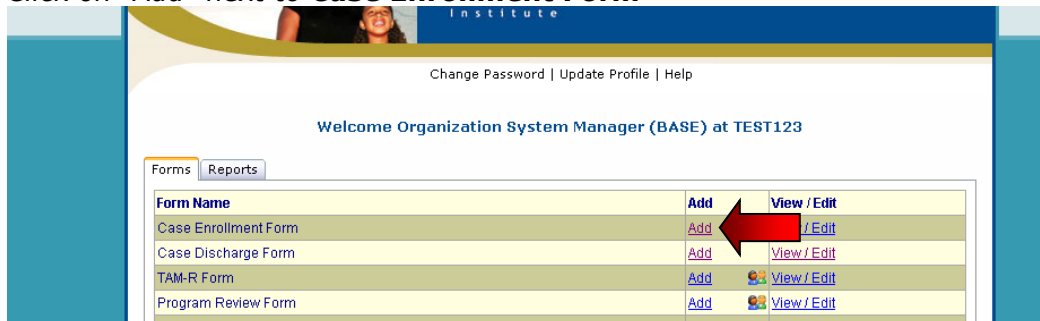
Select DEMO Site and use a System Manager login: osm1/osmdemo1

**Please note: if ever prompted to change the password for this user, please change back to the same exact password as before: osmdemo1**

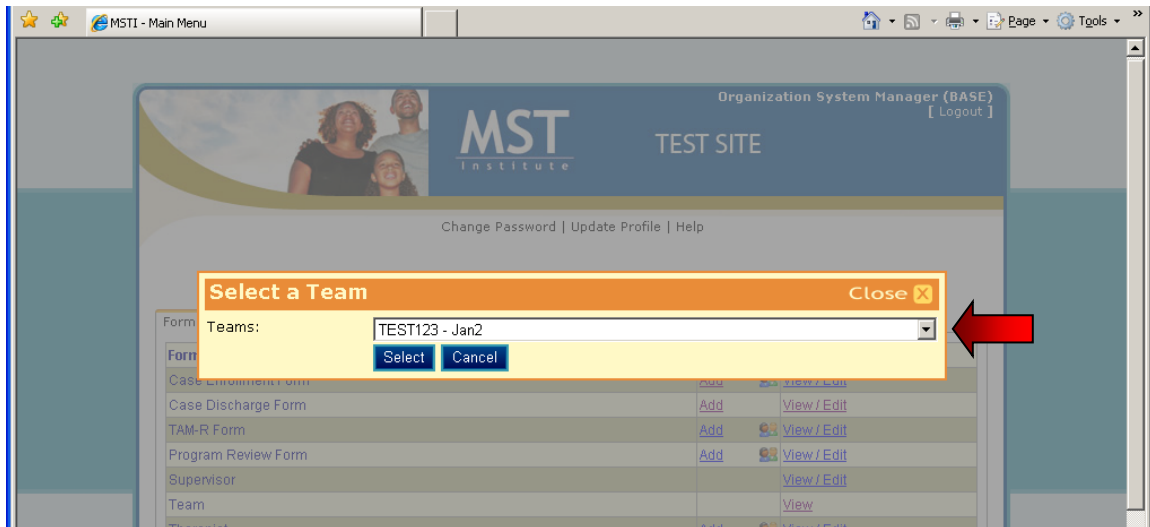
## Case Enrollment Form Demonstration

### Add Case Enrollment Form

Click on "Add" next to **Case Enrollment Form**



A pop-up drop-down selection will appear on your screen, with a list of teams that you have access to. Find the team that you wish to add the case to and click 'Select'.



The following text describes elements on the **Case Enrollment Form**.

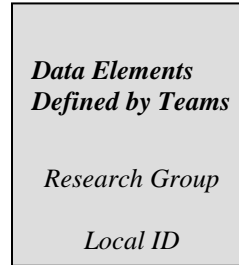
First, notice that some of the information is already completed. This is based on the login code. However, since there are multiple therapists for this team (*see the drop-down list*) we need to identify the therapist for this case. Note that the therapist will default to the first in the list, based on alpha-order. Make sure to change it to the correct therapist.

The Research Group data element can be left with the default value of "Not Specified" unless your organization wants to be able to categorize your clients into groups. Then you would pick a letter to symbolize a particular group. For example, one organization needs to report to their primary funding source on a subset of youth who have a special legal designation. These youth are given a different code from the other youth and reports can be generated that include only these youth.

Now, notice the green dots in the right-hand column, these indicate the data elements that are required. For teams who are using a Call Center to collect TAMs, youth, caregiver name, and phone number are required because TAM-R interviewers need this information. Youth and caregiver name fields must be filled out with their actual name, when using a Call Center to collect TAMs. For all other teams not using a Call Center to collect TAMs, any kind of code can be used for youth and caregiver name. If teams use a code, they need to keep a separate list of the codes and the youth's name in case they need this information later. Other required items include Date of Referral (the day you received the client contact information), and the date of your first face-to-face visit, Gender, Race, Date of Birth, Primary Referral Source.

**Please note:** You should only put one number in the phone number field (other numbers should go in notes). If there is more than one phone number in any of the phone number fields, a Call Center used to collect TAMs will not be able to process that case.

Finally, for those programs that might want to combine this data with other data (e.g., arrest data, Demographic data from their organization's information system) there is a place for a local case ID. This should be a number that has some other meaning for you, like a probation case number, medical record number, etc. It is optional.



For teams that are required to follow GDPR standards, caregiver name, address, and phone numbers, as well as additional contacts, have been removed as required fields. Additionally, youth date of birth will be entered and recorded as year only.

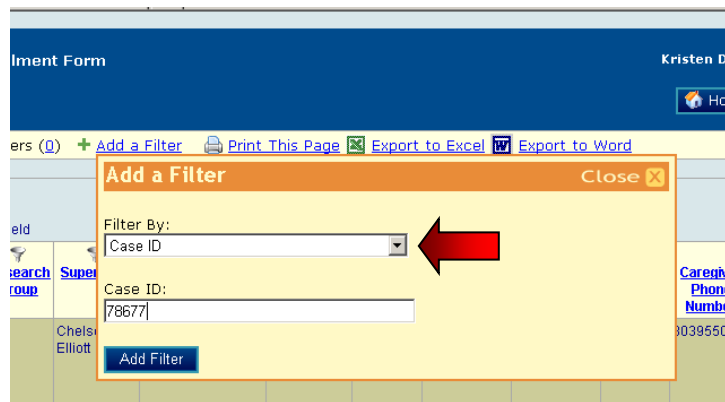
Once you save the records, you will see a confirmation that the record has been saved to the database and a system generated Case ID will be assigned to that case. That ID will always be the first field in every form and it should be used when referencing a case, or any other form, when contacting the MSTI Helpdesk.

To return to the main menu, select 'Home' button on the top-right corner of your screen. You should be back at the **Main Menu**.

## **Edit Case Enrollment Form**

Click on the radio button under "View/Edit" for **Case Enrollment Form**. You are then displayed ALL records, for all sites and teams that you have access to. To narrow down the list, simply add applicable filters, by clicking 'Add a Filter', at the top-left of the menu.

The easiest way to find a specific case that you need to edit is by just adding the filter for 'Case ID'. The Case ID is the system generated ID number assigned to each case when it is added to the system. If you have that, then you can add that filter and type in the ID. That will pull up your case.



If not, you can try to narrow the results of your search down, by entering additional filters and sorting the data, by clicking on the column header that you wish to sort by (see screenshot below). Once you add a filter, a list of cases that fit those criteria will be displayed and you can continue to add additional filters, until you have narrowed down the data, as necessary. Once you find the case that you want to edit, simply click the numbered button, to the left of the record to drill down into that specific case. Once in the full case record, scroll to the bottom and click the 'edit' button.

The screenshot shows a web application interface for MST Institute. At the top, there are navigation buttons for 'Home' and 'Help'. Below that, there are options to 'Add a Filter', 'Print This Page', 'Export to Excel', and 'Export to Word'. The main content area displays a table with 16 records found. The table has columns for 'No.', 'Case ID', 'Organization', 'Team', 'Research Group', 'Supervisor', 'Consultant/System Supervisor', 'First Visit Date', 'Caregiver Name', 'Caregiver Phone Number', 'Local Case ID (optional)', and 'Is Active'. The table contains 5 visible rows of data. Red arrows are overlaid on the image: one pointing to the 'Sort' button, one pointing to the 'Add a Filter here' button, and one pointing to the first record in the table.

No.	Case ID	Organization	Team	Research Group	Supervisor	Consultant/System Supervisor	First Visit Date	Caregiver Name	Caregiver Phone Number	Local Case ID (optional)	Is Active
1	2394	TEST123	Team 2 (CSSD)	Z	Organization Supervisor (BASE)	Consultant/System Supervisor (BASE)	9/1/2005	Mother			No
2	6813	TEST123	Team 2 CSSD	NS	Organization Supervisor (CSSD)	Consultant/System Supervisor (CSSD)	6/10/2005	Grandmother			No
3	6918	TEST123	Team 3 COMU	NS	Organization Supervisor (COMU)	Consultant/System Supervisor (COMU)	8/7/2005	Aunt			No
4					Testing Sup	Consultant/System Supervisor (BPLS)	10/1/2005	Uncle			Yes
5	17967	TEST123	Team 3 COMU	NS	Organization Supervisor (COMU)	Consultant/System Supervisor (COMU)	3/1/2006	Kim Mathers			No

You will be taken to an editable version of the case, where you can edit the case information. Once you have completed your updates, you must click the 'save' button.

## TAM-R Form Demonstration

### Add TAM-R Form

Click on the radio button under "Add" for **TAM-R Form**. Specify a team in the team drop down and click "Continue". The following text describes elements on the **TAM-R Form**.

You are then displayed the TAM-R form, where you can input your data. The case must already be **entered and open**, on the site, in order to enter a TAM-R for it.

Again, notice that some of the information/criteria are already completed. This is based on the login code and the team that you selected. You will need to select the Youth Name in the "Case" field and enter all of the required information. Once complete, make sure that you click "Save" at the bottom of the screen.

Please note: if a case is already discharged, they will not show up in the dropdown list. If a final TAM-R needs to be entered and the case has already been discharged (or discharged in error), please go back to the case enrollment form and change the answer for 'Is Active' from 'yes' to 'no'. They will then be visible in the dropdown. Just make sure to go back after TAM-R entry and change the 'Is Active' back to 'no' or some reporting will be invalid.

### Edit TAM-R Form

Click on the radio button under "View/Edit" for **TAM-R Form**. You are then displayed ALL records, for all sites and teams that you have access to. To narrow down the list, simply add applicable filters, by clicking 'Add a Filter', at the top-left of the menu (as noted in the 'EDIT CASE ENROLLMENT' section above).

The easiest way to find a specific TAM\_R that you need to edit, is by just adding the filter for 'TAM-R ID'. The TAM-R ID is the system generated ID number assigned to each case when it is added to the system. If you have that, then you can add that filter and type in the ID. That will pull up your TAM-R form.

If you do not know the TAM-R ID, you can try to narrow the results of your search down, by entering additional filters and sorting the data, by clicking on the column header that you wish to sort by. Once you add a filter, a list of TAM-Rs that fit that criteria will be displayed and you can continue to add additional filters, until you have narrowed down the data, as necessary. Once you find the TAM-R that you want to edit, simply click the numbered button, to the left of the record to drill down into that specific case. Once in the full TAM-R record, scroll to the bottom and click the 'edit' button.

## ***Discharge Form Demonstration***

### **Add Case Discharge Form**

In order to close a case on the website, we are actually adding information to an existing case form. Therefore, the steps to add a discharge form are a little different.

*Click "Add" for **Case Discharge**.*

This brings up a list of all cases that you have access to. They may already be discharged and closed, or they may not yet have a discharge form and therefore are still opened. Those are the cases that you can still discharge. The easiest way to find those cases, are to sort by the Discharge Date field, so all records that do not yet have a discharge date, are listed first. *Select the record that you want to discharge, by clicking the numbered button to the left of the A **Discharge Form** appears with the case information, from enrollment already completed.*

Now to enter information, go to the bottom of this form and click "Edit" and fill out the discharge information. Notice the Case Progress review section and review the following definitions for those items.

Definitions of outcome categories are listed below and included in a FAQ on ultimate outcomes. All data on this form are required.

### **DATA DEFINITIONS FOR MSTI DISCHARGE FORM**

[Case Progress Review](#)

[Instrumental Outcomes](#)

[Ultimate Outcomes](#)

[Optional Outcome- Substance Use Outcomes](#)

[School / Vocational Training / Working Data Guidelines](#)

[Runaway Youth Discharge Guidelines](#)

### **CASE PROGRESS REVIEW ITEM**

- **Completion:** The youth was discharged based upon the mutual agreement of the primary caregiver(s) and the MST team.
  - The reason for case closure does not meet any of the other categories AND
  - team and family agree that there is evidence that overarching goals have been sustained over a period of 3-4 weeks, OR
  - team and family agree that overarching goals have not been met and treatment has reached a point of diminishing returns for the additional time invested.

*Selection of this category does not assume that the case closed with all goals met, only that primary caregiver(s) and team agreed that no further progress on overarching goals is likely.*

- **Lack of engagement:** The decision to discharge the youth was made because the MST team was not able to engage the family in treatment, despite persistence on the therapist's part to engage and align with the family.
  - Despite persistent efforts by the therapist, the family has not EVER been seen face-to-face for two consecutive weeks OR
  - Family has formally declined MST services OR
  - Family states they do not want to continue (a statement to this effect should be included in note section) AND
  - The consultant and team have identified and addressed barriers to inadequate engagement and agree that all engagement strategies have been exhausted

*Selection of this category indicates that the family has chosen to not participate in MST Services, In other words, this category documents that the team never had engagement. As long as the family was actively involved in working on at least one goal for some part of treatment, this category is NOT checked. This latter case would be counted as "completed" with lack of progress reflected in instrumental goals.*

- **Placement:** The youth was placed in a restrictive setting (detention center, residential placement), or foster care for a duration of time that precluded further MST involvement.
- **Placement, prior event:** The youth was placed in a restrictive setting (detention center, residential placement), or foster care due to an event or offense that occurred prior to the beginning of MST treatment.
- **MST Program administrative removal/withdrawal:** Youth was removed from the program by the MST program administration due to administrative issues or decisions unrelated to the progress of the case.
- **Funding/referral source administrative removal/withdrawal:** Youth was removed from the program by the funding or referral source due to administrative issues or decisions unrelated to the progress of the case.
- **Moved:** The family moved out of the program's service area.

#### **INSTRUMENTAL OUTCOME ITEMS:**

The Instrumental Outcomes are documented in the MST Goals and Guidelines as the criteria for determining whether a case was closed successfully or not. While some guidance in defining these items is provided, it is critical for each program to define these in terms of objectives for the case. For example, if the case had an overarching goal of increasing involvement in pro-social activities as evidenced by attending one approved recreational activity a week, then the related instrumental outcome would be rated as met if the Overarching Goal is met. Therefore, responses to these items are not completely standardized across programs.

#### **ULTIMATE OUTCOME ITEMS:**

These items provide some basic information about how the youth is functioning at the time of discharge. The meaning of the terms (e.g., 'arrests') may vary from county to county, state to state, and country to country; therefore, it is difficult for the MST Institute to establish a "one-size-fits-all" definition. The operational

definition of each of the following should be made clear for each MST program and documented in the Goals and Guidelines document. The following definitions are offered as guidance based on common performance measures used in the United States.

- **Youth is living at home.** Home is defined as a private residence that is approved by the youth's guardian. This could include a parent's home, the home of an approved relative or friend of the family. Foster homes or other types of placement would not be included in the definition of "home". Youth who are on runaway status would not be at home.
- **Youth is attending school (is not truant,) or vocational training or, if of the legally appropriate age to not attend school, has a paying job (at least half-time).**
- Youth is attending school, a high school equivalency program (GED program,) or a vocational program in the youth's natural ecology, or working. The primary objective of the program is educational or vocational. A youth in a correctional facility or treatment setting in which educational or vocational activities are provided, where the primary objective is treatment or correction, will NOT count as a "yes" for this item.
- If the youth is in school, youth is attending frequently enough to meet expectations placed on youth by school system or court. If the discharge occurs during the summer when school is not in session, it is recommended that the response "yes" be selected if the youth was attending school at the end of the last school year, or is working.

*This item should be answered for all youth, in addition to the choice of "yes" or "no" above. Please select one item from the list that BEST describes the youth's current setting.*

- traditional school
  - traditional school that includes a vocational component
  - solely vocational training program
  - GED or other secondary school equivalency program
  - alternative educational program or setting due solely to academic need
  - alternative program or setting due to anti-social, offending or disruptive behavior
  - in a correctional facility or treatment setting where the primary objective is treatment or correction (choose this even if educational or vocational activities are provided in the facility)
  - not in any educational or vocational program, and working at least half-time
  - not in any educational or vocational program, and not working at least half-time
  - other- please specify \_\_\_\_\_
- **Youth has not been arrested since the beginning of MST treatment, for an offense committed during MST treatment.** Many MST programs have defined arrests as involvement with police that results in a charge for a new criminal behavior (i.e., not a violation of probation).

Each MST program should view the lack of a clear definition of arrest as an 'opportunity' to revise, clarify, and improve their existing Goals & Guidelines document. This will likely entail drafting a working definition and then seeking input from key stakeholders in order to establish a clear, specific, objective, and measurable definition to guide future entries on the website.

## OPTIONAL OUTCOME- SUBSTANCE USE OUTCOMES

### ***Optional Item***

***Substance use outcomes are tracked at the request of the program/system. Programs that track this outcome have documented in their Goals and Guidelines, and reviewed with their MST Expert, a definition for this measure.***

### **SUBSTANCE USE OUTCOMES**

This item measures substance use outcomes *only for youth for whom substance use is an identified MST treatment target*. This item provides basic information about how the youth is functioning at the time of discharge. The meaning of the relevant terms (e.g., 'reduction' and 'substance use') may vary from county to county, state to state, and country to country; therefore, it is difficult for the MST Institute to establish a "one-size-fits-all" definition. The operational definition of each of the following should be made clear for each MST program and documented in the Goals and Guidelines document. Substance use is measured objectively (e.g. by urinalysis tests, breath scans, etc.). Subjective evidence of substance use may also be collected; however, MST programs should prioritize and maximize collection of objective measures. The following definitions are offered as guidance based on common performance measures:

- **Substance use was an MST treatment target for this youth**
  - Substance use was a referral behavior and/or
  - Reduced substance use was an MST Overarching Goal and/or
  - Substance use interventions were identified in intermediary goals

For youth in this subgroup (substance use was an MST treatment target):

- **Youth has reduced use of alcohol and/or other substances**
  - **as evidenced by objective measures.**

Objective means of measuring youth substance use include analysis of biological specimens: urine, hair, saliva, breath-air, sweat. These measures may be taken in the home or outside the home (e.g. in a lab or a court setting).
  - **as evidenced by subjective measures.**

Subjective indicators of youth substance use include, but are not limited to, behaviors, physical appearance, youth self-report, performance, etc.
  - **both**

Each MST program should view the lack of a clear definition of the above as an 'opportunity' to revise, clarify, and improve their existing Goals & Guidelines document. This will likely entail drafting a working definition and then seeking input from key stakeholders in order to establish a clear, specific, objective, and measurable definition to guide future entries on the website.

### **GUIDELINES FOR SCHOOL/ VOCATIONAL TRAINING/ WORKING DATA ITEM**

**Background:** Ideally, youth participating in MST are staying in school and are obtaining an education in traditional, mainstream school settings. While some individuals in the youth's natural or service system ecology may advocate sending the youth to a non-traditional setting for educational purposes, evidence is lacking



that such programs or settings will improve the educational and behavioral outcomes for youth. Some youth in MST, however, may be participating in such programs or settings.

In order to gather more information about the range of those types of settings being used for MST youth around the world, the type of school setting a youth is in at discharge is entered. This data is being collected only to inform our learning at this time.

### **Examples of Each Category**

*Please find below a list of examples for each category included in the drop-down menu. This is not meant to be an exhaustive list, but rather to give a range of examples from multiple systems to help teams think through each category and identify what is most frequently used in their school systems. Please consult with your MST expert for guidance as needed.*

- traditional school  
**Examples:** *Mainstream schools such as senior high, junior high, middle school, secondary school, municipal or community schools, and charter or private schools selected by the family.*
- traditional school that includes a vocational component  
**Note:** *In some settings such as Europe, this combination is common. See next category for examples of vocational programs.*
- solely vocational training program  
**Examples:** *Local or community-based vocational-technological school, vocational-technological schools connected to the youth's/young person's high school/secondary school, college training that is vocationally-based, Job-Corps, some types of work study program in which the youth/young person leaves his/her regular education and goes to a work-study/vocational program for training*
- GED or other secondary school equivalency program  
**Examples:** *GED (General Equivalence Degree) preparation classes within the local school district or in a community-based setting OR settings which allows the youth/young person to study just for exams to catch up on education they have missed*
- alternative educational program or setting due solely to academic need  
**Examples:** *Public, charter or private schools or settings that are mandated or selected by school personnel or caregivers that are **designed to meet the academic needs of the youth/young person.** These could include but are not limited to the following: home-schooling, home-based tutoring, community-based tutoring such as in the local library where the youth/young person goes instead of going to school (either paid by the home-school district or by the caregivers), computer/on-line distant learning, pupil referral unit, boarding school, or an intermediate unit class, designed to meet academic needs.*
- alternative program or setting due to anti-social, offending, or disruptive behaviors  
**Examples:** *Public, charter or private schools or settings that are mandated or selected by school personnel or caregivers **due to the youth's/young person's behavioral concerns.** These could include but are not limited to the following: alternative schools, day treatment programs, pupil referral unit, boarding school, military school, partial-hospitalization programs, or home,*

*library, or computer-based schooling or tutoring that is selected or mandated based on the youth's problem behaviors.*

- in a correctional facility or treatment setting where the primary objective is treatment or correction (choose this even if educational or vocational activities are provided in the facility)  
**Example:** *Daily classes provided to residents of an inpatient unit. Note that "correctional facility" and "treatment setting" here refer to residential facilities.*
- not in any educational or vocational program, and working at least half-time  
**Note:** *Determination of what constitutes half-time work should be based on the country's standards for full-time work.*
- not in any educational or vocational program, and not working at least half-time  
**Note:** *Self-explanatory.*
- other - please specify \_\_\_\_\_  
**Note:** *Please only choose "other" after carefully considering and ruling out each of the categories above. When this category is chosen, please describe the details of the youth's/young person's school setting.*

## **GUIDELINES FOR WHEN YOUTH IS ON RUNAWAY STATUS**

### **Assumptions**

- 1) Being on runaway status is considered an antisocial behavior, just like any other antisocial behavior (e.g., being truant). From an MST perspective, it should be addressed like any other behavior, and a case should not be discharged based on this behavior alone.
- 2) Different systems vary in how they respond to runaway behavior. This can present significant challenges to the team in being able to continue to provide MST, e.g., some systems have time limits for how long the case can remain open if the youth is on runaway status.
- 3) Despite the legal parameters the MST team works within, if the family has had an opportunity for a full course of treatment, the case should be closed using one of the "clinical" reasons, e.g., "closed by mutual agreement", "lack of engagement" or "placed".
- 4) The case closure categories, "MST Program administrative removal/withdrawal" or "Funding/referral source administrative removal/withdrawal", are limited to situations where the case is closed for reasons that are "unrelated to the progress of the case". Therefore, careful consideration must be used when closing a case for this reason.

**The following guidelines are provided to assist in deciding how to code the case progress review item when the team closes a case while the youth is still on runaway status.**

- 1) **Determine if the family has had an opportunity for a full course of treatment.** An example of not having this opportunity might be if the youth was on the run at the time of referral, or shortly thereafter and the funder requests closure (preventing the therapist and family from having more than a couple of sessions). This case could be closed using the category "MST Program administrative removal/withdrawal" or "Funding/referral source administrative removal/withdrawal".

- 2) **Determine if therapist has ever had engagement with the family.** As long as the family was actively involved in working on at least one goal for some part of treatment, the category of “lack of engagement” should not be used.
- 3) **Determine if the case should be closed as “placed”.** This category is used only if the team is quite certain that once found, the youth will be placed, e.g., the youth is already a ward of the juvenile system and will be placed automatically without returning to court for sentencing for the runaway behavior.
- 4) **Determine if the case should be closed as “completion” (due to diminishing returns).** This closing category does not assume that the case closed with all goals met, only that stakeholder/funder, primary caregiver(s) and team agreed that no further progress on overarching goals is likely due to youth not being in the home. The actual case progress on goals would then be documented using the ratings for instrumental and ultimate outcomes.

**The following guidelines are provided to assist in deciding how to code Ultimate Outcomes when the team closes a case while the youth is still on runaway status.**

**1) Coding Ultimate Outcomes:**

- a. “At home”: if a youth is on runaway status at the time of closure, this would be marked “no”.
- b. “In school/working”: there are youth that may be on the run, but are still attending school (or working); therefore, the team would need to verify whether the youth is attending school (or work) in order to determine how to mark the ultimate outcome of “in school/working.”
- c. “Arrest”: this is completed based on stakeholder’s definition of arrest. Many MST programs have defined arrests as involvement with police that results in a charge for a new criminal behavior (i.e., not a violation of probation which is the typical charge for youth absconding/on the run).

**Optional:** Some major stakeholders want systems/organizations/teams to track the number of youth who are on runaway status at discharge. This is not defined by MST as an ultimate outcome; therefore, teams can consider tracking this by adding documentation of runaway status in the “notes field” of the Discharge Form or by using a research code.

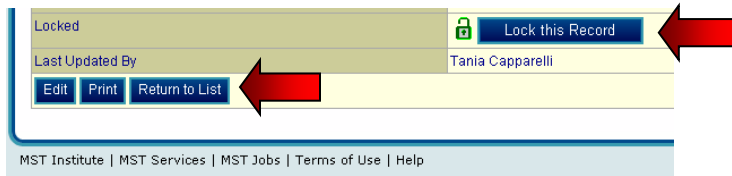
**Saving the Discharge Form**

Once all the required data is entered, click “Save” and you will get a message that the update was successful.

Additional things you can do from this form are as follows:

- Click “Print” if you want a black and white hard copy
- Click “Edit” if you see an error that you want to correct
- Click “Return to List” if you want to complete a discharge form on another youth in the existing list

- Click "Lock this Record" when you want to prevent anyone from making changes (*If a case is locked by accident, you must contact the MSTI Helpdesk at [msti@mstinstitute.org](mailto:msti@mstinstitute.org) and request that the record be unlocked*)



The discharge forms are completed by the team and reviewed by the Consultant or System Supervisor. Once the data is checked and there is consensus with the Consultant or System Supervisor, the data can be locked by the supervisor.

In order to go back to the **Main Menu**, scroll to top right and click on "Home".

### **Edit Case Discharge Form**

*Click on the radio button under "Edit" for **Case Discharge Form**.*

*You are then displayed the Record Selection Criteria Screen, where you can input criteria to pull up a certain case(s).*

Again, notice that some of the information/criteria are already completed. This is based on the login code.

The easiest way to find a specific discharge form that you need to edit is by just entering the Case ID number in the first field on the Record Selection Criteria Screen. The Case ID is the system generated ID number assigned to each case when it is added to the system. If you have that, then you can just leave everything else to default and click, 'Continue'. If not, you can try to narrow the results of your search down, by entering criteria, sorting and clicking 'Continue'. A list of cases that fit those criteria will be displayed.

You can find the case that you want to edit and click the numbered button, to the left of the record to drill down into that specific case. Once in the full case record, scroll to the bottom and click the 'edit' button.

You will be taken to an editable version of the case discharge form, where you can add and edit the case discharge information. Once you have completed your updates, you must click the 'save' button.

## ***SAM Demonstration***

Using a therapist login (ot1/otdemo1), we will go in and add a SAM form.

**Please note: if ever prompted to change the password for this user, please change back to the same exact password as before: **otdemo1****

### **Add SAM Form**

*Click on the radio button under "Add" for **SAM Form**.*

*Select the team the Supervisor is on. Most therapists will only have one team displayed but if your team doesn't show, click the drop down to find the correct team.*

*Click on the team that you want to add the form to and click "Select".*

*The following text describes elements on the **SAM Form**.*

Again, notice that some of the information/criteria are already completed. This is based on the login code. Therapists are the only user that can add SAMs. They only

have access to add, edit and view their own SAMs. Consultants are the only user types that have access to view the therapists' SAMs. Supervisors do not have access to these!

Fill out the required information and click "Save".

### **Edit SAM Form**

*Click on the radio button under "View/Edit" for **SAM Form**.*

*You are then displayed ALL of your SAMs. To narrow down the list, simply add applicable filters, by clicking 'Add a Filter', at the top-left of the menu (as noted in the 'EDIT CASE ENROLLMENT' section above).*

The easiest way to find a specific SAM that you need to edit is by just adding the filter for 'SAM ID'. The SAM ID is the system generated ID number assigned to each case when it is added to the system. If you have that, then you can add that filter and type in the ID. That will pull up your SAM form.

If you do not know the SAM ID, you can try to narrow the results of your search down, by entering additional filters and sorting the data, by clicking on the column header that you wish to sort by. Once you add a filter, a list of SAMs that fit that criteria will be displayed and you can continue to add additional filters, until you have narrowed down the data, as necessary. Once you find the SAM that you want to edit, simply click the numbered button, to the left of the record to drill down into that specific case. Once in the full SAM record, scroll to the bottom and click the 'edit' button.

**Entering and editing the CAM Form works the same as the SAM Form. The CAM is available to both supervisors and therapists while the SAM is only available to therapists.**

## ***Report Options Demonstration***

All users have access to basic list reports, which are views of the raw data in the different forms (e.g., case enrollment form, TAM-R form) to assist them in monitoring the accuracy of the data. The List Reports are accessed from the right column (called "View/Edit"), of the **Main Menu**.

If you want to see everyone that you served last year, click on "View/Edit" for **Case Enrollment** form and then click "Continue". Now you should see the **list of records**. 'Add Filter' will allow you to design your list. Select 'Add Filter' and select "Date of Referral" as the filter. Then specify only cases referred from during the last year. Then click 'Add Filter'. Then click on the "Date of Referral" column header, to sort by the date.

To get back to the **Main Menu**, click on "Home".

Please get on the Demonstration site at any time and explore on your own.

**NOTE: Questions and requests, regarding the MSTI Website can be emailed to [msti@mstinstitute.org](mailto:msti@mstinstitute.org). E-mail requests are responded to within 2 business days. Please make sure that any email requests are written clearly and in complete sentences. Make sure to provide as much information about the request, in your original email. This will ensure a prompt response and assist in efficiency.**