Managing Web Users

A Guide for Supervisors, Organization System Managers and Consultants/Experts

MST INSTITUTE

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Contents

Website Training - Who Needs to Know What?

ATTENTION: Please make sure that ALL staff that will be using the website either review the 'Basic Training' webinar and/or download and review the 'Basic Training' guide. They are responsible for knowing this information and should always refer to this guide, prior to emailing the MSTI Helpdesk.

Supervisors, Organization System Managers and Consultants/Experts are responsible for knowing the information found in the 'Managing Users' guide, as well as viewing the webinar as they are responsible for knowing how to run and use the various reports on our website.

All training guides can be found here: https://msti.org/mstinstitute/services/training.html.

Registering your Organization and Teams

Once you have a contract in place to allow your organization to provide MST and a supervisor has been identified for the team, you can register your organization and team(s) on the website. Please discuss your options for TAM data collection with your MST Consultant/Expert or the MST Program Developer working with you so you will be able to answer the questions on the registration form.

IF YOU ARE BRAND NEW TO THE WEBSITE: If you are a licensed provider and you need to register to use the MST Institute's data website, you will need to complete the New Organization Registration Form, found on the MST Institute's main page, at https://msti.org/ , with your Consultant/Expert.

IF YOU NEED TO ADD A TEAM TO AN EXISTING ORGANIZATION: If you are a new team that has been added to an organization that already exists on the website, you will need to complete the New Team Registration Form, found on the MST Institute's main page, at https://msti.org/, with your Consultant/Expert.

IF YOU NEED TO MAKE ANY CHANGES TO EXISTING TEAM(S) OR ORGANIZATION: If you need to make any changes to an existing team(s), or any of the information for your organization on the MSTI data website, you will need to complete the Organization/Team Change Form at https://msti.org/.

TAM COLLECTION WITH MSTI: To inquire about using the MSTI Call Center for TAM Collection, please send a request to msti@mstinstitute.org and copy the MST Consultant/Expert assigned to your program. Options available to your program will be provided within 2 business days.

NAMING YOUR TEAMS: When selecting a name for your team, please make sure to follow the rules below. If the team name you select does not follow these guidelines, we will assist you in renaming them.

a) Team name must be unique.
b) If you have multiple teams in the same location and want to give them the same name, a unique name can be created by adding a unique numeric value to the end of the name, e.g., Hartford1 and Hartford2
c) The team name should be different from the organization name.

Overview of MSTI Website User Levels

Determining who, at your organization, will have what level of access must be done within the organization. You may find it helpful to discuss this with your Consultant/Expert as they may have recommendations regarding this. Below is an overview of the different web user levels available to organizations.

Organization System Manager (OSM)

- Persons in the organization with responsibility for monitoring program performance. There can be multiple users at this level. This person is NOT an MST Supervisor unless the supervisor has the additional responsibility of monitoring MST programs with multiple supervisors. In this situation, the MST Supervisor will need two separate access levels.
- Responsible for managing all organization website users, including supervisors and therapists, in the system. They are responsible for maintaining all of the organization's team data to reflect current information, as well as updating the site to reflect any employee turnover. They may also decide to train and split up the management of user accounts by team. This would mean that they would assign team supervisors the responsibility of updating user accounts for each of their own teams.
- Have access to reports on the website that assist in monitoring the performance of their organization. The Organization System Manager manages at the organization level. They can access information on any team within the organization and therefore have the highest level of website access within that organization.
- There can be multiple users in an organization with this level of access; however, the

organization should be clear about who has primary responsibility for managing the organization's user information.

Supervisors (S)

- Responsible for managing the team(s) for which they are the MST Supervisor. Each team within the organization is assigned one supervisor. However, one supervisor may be assigned to multiple teams.
- Supervisors typically manage their own team's therapists, meaning adding and updating them when there is turnover. This is something that needs to be discussed between the Organization System Manager and the Supervisors, so that everyone is clear in their roles and responsibilities pertaining to the website and so that there are not multiple personnel adding and editing the same employees, etc.
- Have access to run all of the reports available to the Organization System Manager, but they are only allowed to view the data for their designated team(s). The Supervisor manages at the team level and can only access data/users assigned to their team(s).

Therapists (T)

- Responsible for adding their cases, discharges, and SAMs. They also have access to view the TAM schedule report to monitor the TAMs scheduled for their cases.
- They can only access and manage their own cases.

Data Manager (DM)

- They have access to add/edit/view case and TAM data at the organizational level for all teams. They also have access to view the TAM schedule report to monitor the TAM data collection.
- Typically used by administrative staff who will not need to run the standard reports. Many programs will not have a separate person designated to have this level of access.

Adding, Editing and De-activating Web Users

NOTE - IT IS IMPERATIVE THAT ANY USERS THAT ARE NO LONGER WITH YOUR ORGANIZATION, ARE MADE INACTIVE IMMEDIATELY AFTER THEY LEAVE, TO PROTECT YOUR DATA. MAKE SURE THAT YOU ARE DEACTIVATING OLD SUPERVISORS AND THERAPISTS, AS WELL AS NOTIFIYING THE MSTI HELPDESK TO DEACTIVATE ANY OTHER TYPES OF USERS. DEACTIVATING A USER WILL DEACTIVATE THEIR LOGIN TO THE WEBSITE.

UPON DEACTIVATION, USER'S NAME WILL BE DEIDENTIFIED, AND THEIR EMAIL ADDRESS WILL BE REMOVED. PRIOR TO MAKING ANY USER INACTIVE, YOU MAY CHOOSE TO KEEP A LOCAL RECORD OF THE USER'S MSTI ID NUMBER. THIS WILL MAKE IT EASIER TO CONNECT DATA TO INACTIVE USERS IN FUTURE REPORTS.

Supervisors

Only the MSTI Helpdesk personnel have access to add supervisors to the website. The Organization System Manager (OSM) or the Consultant/Expert must complete the Organization/Team Change Form, found on the MST Institute's main page, at https://msti.org. Once this form is filled out in its entirety, the MSTI Helpdesk will be notified and can begin working on your request.

Once the Supervisor is added, the MSTI Helpdesk will send a confirmation email to the individual who made the request. The new Supervisor should receive 2 automated emails from the system, within the hour of setup. One email will include a link to verify the account and set up a password, and the other email will contain the username. They should immediately check these emails and verify the account, as the link to verify the account is only active for 4 hours. If the 4-hour window is missed, you will need to go through the process of resetting your password. On the main login page, click 'reset password'. Then, click 'send mail' and it will allow you to enter in your email address associated with your account. This will prompt the system to send you another link to verify the account and set up a password. If you have any trouble with this, please reach out to the MSTI Helpdesk for assistance.

If adding a new team, the MSTI Helpdesk will send the Consultant/Expert confirmation that the team was set up. The Organization System Manager or Supervisor can proceed with adding the Therapists for that team, by going to "Add" Therapist on the website's main menu. Enter the information and save the record. (See the Therapist section below for full instructions).

Therapists

Both Organization System Managers and Supervisors are responsible for adding, editing and de-activating therapists.

1) Add new Therapists to the correct team(s), by selecting "Add" Therapist on your main menu and selecting the team in the middle of the main menu.
2) Click 'Continue'.
3) Enter all required information in the form and save the record.
    - NOTE ON USERNAMES: You are responsible for assigning the website username. The MSTI Helpdesk does not assign that. Make sure that you make it unique. It can be a combination of letters and numbers, but no email addresses, special characters, or spaces should be used! A good example of a website username is 'jdoe6752'.
    - NOTE ON PASSWORDS: Please make sure that you double-check the email address you enter for the therapist, to ensure that it is typed correctly, in order for the therapist to receive it. Our system will automatically generate 2 emails, within an hour of setup. One of those emails will include a link to verify the account and set up a password. They should immediately check these emails and verify the account, as the link to verify the account is only active for 4 hours. If the 4-hour window is missed, they will need to go through the process of resetting their password. On the main login page, they need to click 'reset password'. Then, click 'send mail' and it will allow them to enter in their email address associated with their account. This will prompt the system to send them another link to verify the account and set up a password. If they have any trouble with this, please ask them to reach out to the MSTI Helpdesk for assistance.

A Therapist can be edited, or de-activated by going to "Edit" Therapist on the main menu. To de-activate a Therapist, you edit the form to add an 'end date' for that therapist. Then, scroll towards the bottom of the record and change the "Active" status to "No". Make sure that you save the record after you make any updates, or edits.

On occasion, you may have a therapist that goes out on a lengthy leave (defined as more than 3 weeks). We suggest these steps be followed for any staff person who is expected to return to the job at some point.

a. While out on lengthy leave therapist should remain active on MSTI.
b. The therapist's FTE should be changed to "0" until they return.
c. Upon the therapist's return the FTE should be adjusted to reflect the portion of FTE the person is expected to do. *They could return at half-time so the FTE should reflect that. Supervisors/programs are reminded to continue to manage the therapist's FTE to reflect added capacity as caseload expectations increase.*

A Therapist can also be transferred from one team to another, by editing the therapist and changing the team name in the team drop-down, on their form. Once this is changed, simply save the form and the therapist is now transferred to the other team. The supervisor and consultant/expert information will automatically update, based on the team you select. NOTE: When transferring a Therapist, all of their OPEN cases will automatically transfer with them. So, if you want those cases to be transferred to another therapist, on the original team, you need to transfer each of those cases first (SEE BELOW SECTION 'TRANSFERRING CASES TO NEW THERAPISTS').

Data Managers and Organization System Manager (OSM)

Both Organization System Managers and Data Managers must be added and deactivated by the MSTI Helpdesk.

If you need to add either type of user to the website please complete the New User Request Form found on the MST Institute's main page, at https://msti.org. Once this form is filled out in its entirety, the MSTI Helpdesk will be notified and can begin working on your request.

Consultants/Experts

Consultants/Experts must be added/edited by the MSTI Helpdesk personnel. For a Consultant/Expert that is new to the website, please complete the New User Request Form found on the MST Institute's main page, at https://msti.org. If an existing Consultant/Expert needs to be changed for a specific team, please complete the Organization/Team Change Form found on https://msti.org.

Once the form is filled out in its entirety the MSTI Helpdesk will be notified and can begin working on your request.

NOTE: Questions and requests, regarding the MSTI data website can be emailed to the MSTI

Helpdesk at msti@mstinstitute.org. Emails 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.

Transferring Cases to New Therapists

In addition to deactivating an old therapist, you must transfer any of their OPEN cases to the new therapist. If you deactivate the therapist prior to doing this, it will lock up the therapist field on all of their cases.

To transfer a case to a new therapist, follow these steps:

- Click 'Edit' for the Case Enrollment form on the main menu, and then pull up the case that you need to edit (this process is reviewed in the Basic Training webinar and guide).
- Click 'Edit' at the bottom of the completed form.
- Scroll up to the therapist field and change it to the new therapist's name (they will only appear in the drop-down selection, if you have first entered them into the system).
- Now, save the form. This automatically updates the team, supervisor and consultant/expert, based on the therapist that you selected and the team that they are associated with, in the system.

Transferring Therapists to Other Teams

Therapists can be transferred between teams in the same organization. Supervisors are able to transfer therapists if they supervise both of the teams. If not, the Organization System Manager (OSM) can make the transfer for them.

To transfer a therapist, follow these steps:

- Edit the Therapist record as noted in steps, in above section.
- Change ONLY the team name in the team drop down.
- Save the record. Nothing else needs to be changed.

Transferring a therapist will automatically transfer all of that therapist's OPEN cases to the new team, as well.

Discharged, closed cases and TAMs will remain on the original team and cannot be transferred.

Transferring Teams to New Consultants/Experts or Supervisors

Only the MSTI Helpdesk can transfer teams to new Consultants/Experts or Supervisors. To facilitate this change, please fill out the Organization/Team Change Form on https://msti.org/. Once the form is filled out in its entirety, the MSTI Helpdesk will be notified and can begin working on your request.

If a new supervisor is replacing a previous supervisor, the system will automatically transfer all OPEN cases to the new supervisor. CLOSED cases will remain under the previous supervisor, which will prevent the new supervisor from accessing that data. The Organization System Manager (OSM) does have access to all data, from all supervisors, so they are able to run reports that include past data.

If a new consultant/expert is replacing a previous consultant/expert, the system will automatically transfer all OPEN cases to the new consultant/expert. CLOSED cases will remain under the previous consultant/expert, which will prevent the new consultant/expert from accessing that data. The Organization System Manager (OSM) does have access to all data, from all consultants/experts, so they are to run reports that include past data.