

# *Managing Web Users – A Guide for Supervisors, Organization System Managers and Consultants/Experts*

## **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**' webinar and guide.

**Supervisors, Organization System Managers and Consultants/Experts** 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>.

The website training session descriptions, webinars, as well as, the schedule and registration for live webinars can be found here: [Webinar Dates and Times - MSTI Web Site Training Webinars \(cvent.com\)](#)

## **Registering your Organization and Teams**

Once you have a contract in place to allow your organization to provide MST therapy 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.

To register your organization and team(s), add, or edit new teams to your organization, or to order the MSTI call center service for TAM Collection, visit our Forms & Resources page at <https://msti.org/mstinstitute/contact/resources.html>.

**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 website, you will need to complete the MST Organization Registration Form, [https://msti.org/mstinstitute/contact/update\\_forms.html](https://msti.org/mstinstitute/contact/update_forms.html), 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 MST Team Registration Form, found at [https://msti.org/mstinstitute/contact/update\\_forms.html](https://msti.org/mstinstitute/contact/update_forms.html), with your Consultant/Expert.

**TAM COLLECTION WITH MSTI:** To inquire about using the MSTI Call Center for TAM Collection, please send a request to [msti@mstinstitute.org](mailto:msti@mstinstitute.org) and copy the MST Consultant/Expert assigned to your program. In order to begin using our system, you will need to fill out the Web Order Form and the TAM Collection Contract, found here: <https://www.msti.org/mstinstitute/contact/resources.html>.

## *Managing Web Users – A Guide for Supervisors, Organization System Managers and Consultants/Experts*

**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, or Coach, 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).

## *Managing Web Users – A Guide for Supervisors, Organization System Managers and Consultants/Experts*

### **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 NOTIFYING 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 AND PHONE NUMBER 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 MST Organization\_Team Change Form, found at [https://msti.org/mstinstitute/contact/update\\_forms.html](https://msti.org/mstinstitute/contact/update_forms.html). Once this form is filled out in its entirety, it should be emailed or faxed over to the MSTI Helpdesk, using the instructions located at the bottom of the form.

Once the Supervisor is added, MSTI will send a confirmation to the Organization System Manager or Consultant/Expert. The Supervisor should receive 2 automated emails from the system, within the hour of setup, which will include a link to verify the account and set up a password, and a separate email with 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 adding a new team, MSTI will send the Organization System Manager or Consultant/Expert a 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).

## *Managing Web Users – A Guide for Supervisors, Organization System Managers and Consultants/Experts 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: Our system will automatically generate 2 emails, within the 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. 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.

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 have to be added and deactivated by the MSTI Helpdesk.

If you need to add either type of user to the website complete the appropriate registration form found at [https://msti.org/mstinstitute/contact/update\\_forms.html](https://msti.org/mstinstitute/contact/update_forms.html). Once this form is filled out in its entirety, it should be emailed or faxed over to the MSTI Helpdesk, using the instructions located at the bottom of the form.

# *Managing Web Users – A Guide for Supervisors, Organization System Managers and Consultants/Experts*

## **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 MST Consultant\_Expert Registration Form found at [https://msti.org/mstinstitute/contact/update\\_forms.html](https://msti.org/mstinstitute/contact/update_forms.html). If an existing Consultant/Expert needs to be changed for a specific team, please complete the MST Organization\_Team Change Form found at [https://msti.org/mstinstitute/contact/update\\_forms.html](https://msti.org/mstinstitute/contact/update_forms.html). Once either form is filled out in its entirety, it should be emailed or faxed over to the MSTI Helpdesk, using the instructions located at the bottom of the form.

**NOTE: Questions and requests, regarding the MSTI website can be emailed to the MSTI Helpdesk at [msti@mstinstitute.org](mailto: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/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.

## *Managing Web Users – A Guide for Supervisors, Organization System Managers and Consultants/Experts*

### ***Transferring Teams to New Consultants/Experts or Supervisors***

Only the MSTI Helpdesk can transfer teams to new Consultants/Experts or Supervisors.

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 able to run reports that include past data.