

Managing Web Users – A Guide for Supervisors, System Managers and Consultants

Overview of Enhanced Web Site 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, or Coach, as they may have recommendations regarding this. Below is an overview of the different web user levels available to organizations.

Organizational 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 web site 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 web site, that assist in monitoring the performance of their organization. The Organizational System Manager manages at the organization level. They can access information on any team within the organization and therefore have the highest level of web site 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 Organizational System Manager and the Supervisors, so that everyone is clear in their roles and responsibilities pertaining to the web site 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 Organizational 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 designated 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.

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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.

Web Site Training - Who Needs to Know What?

ATTENTION: Please make sure that **ALL** staff that will be using the web site, either register and attend the 'Basic Training' session and/or download and review the 'Basic Training' guide, located here: www.mstinstitute.org/services/training.shtml. They are responsible for knowing this information and should always refer to this guide, prior to emailing the helpdesk.

Supervisors, System Managers and Consultants are responsible for knowing the information found in the 'Managing Users' session and guide, found here: www.mstinstitute.org/services/training.shtml.

Supervisors and Consultants are responsible for knowing how to run and use the various reports on our web site. Those guides are also found here: www.mstinstitute.org/services/training.shtml.

The web site training session descriptions, schedule and registration can be found here: mstconference.com/website_training/.

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 web site. A separate contract is required for TAM collection to be done by the MSTI call center. Please discuss your options with your MST 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 on www.mstinstitute.org at www.mstinstitute.org/contact/resources.shtml.

IF YOU ARE BRAND NEW TO THE WEB SITE: If you are a licensed provider and you need to register to use the MST Institute's web site, you will need to fill out the [New Organization and Team Registration form](#). Fill it out and e-mail it to msti@mstinstitute.org and CC your MST Expert. Make sure that you fill out all of the information on the form.

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 web site, you will need to fill out the [New Team Registration form](#). Fill it out and e-mail it

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to msti@mstinstitute.org and CC your MST Expert. Make sure that you fill out all of the information on the form.

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 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: www.mstinstitute.org/contact/resources.shtml.

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.

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 WEB SITE.

Supervisors –

Only the MSTI Help Desk personnel have access to add Supervisors to the web site. The System Manager (OSM) must send an e-mail request to msti@mstinstitute.org.

Make sure to include the following information, in the e-mail request to add a new Supervisor (*in small programs this may be the same person as the OSM*):

1. New Supervisor's First Name and Last Name
2. New Supervisor's E-mail
3. New Supervisor's Fax Number
4. New Supervisor's Phone Number
5. Team Name (**as displayed on the MSTI web site**)
6. Team City and State

Once the Supervisor is added, MSTI will send a confirmation to the System Manager. The supervisor should receive 2 automated emails from the system, within the hour of setup, which will include a temporary password and a username. They should immediately login and change the password.

If adding a new team, MSTI will send the System Manager a confirmation that the team was set up. The System Manager, or Supervisor can proceed with

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adding the Therapists for that team, by going to “Add” Therapist on the Web Site’s main menu. Enter the information and save the record. (See the Therapist section below for full instructions).

- Only MSTI Help Desk personnel and Organizational System Managers have access to edit and de-activate Supervisors on the web site. They can do this by going to “Edit” Supervisor on the main menu. To de-activate a Supervisor, you scroll towards the bottom of the record and change the “Active” status to “No”. Make sure that you save the record after you make an updates, or edits.

Therapists –

- Both Organizational 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 web site username. The helpdesk does not assign that. Make sure that you make it unique. It can be a combination of letters and numbers, but no special characters, or spaces should be used! A good example of a web site username is 'jdoe6752'.
 - NOTE ON PASSWORDS: Our system will automatically generate and send a password to each therapist that you save to the web site. The password will be sent to the email address that you enter for that therapist, so make sure that you double-check the email address, 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 scroll towards the bottom of the record and change the “Active” status to “No”. Make sure that you save the record after you make an updates, or edits.
- 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 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 Organizational System Manager –

- Both Organizational 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 web site, you must send an e-mail request to msti@mstinstitute.org. Make sure that you include the full

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organization name, the person's first and last name and e-mail address. Also, make sure to specify which user type the person should be.

Consultants –

- Consultants must be added/edited by the MSTI Help Desk personnel. If you need to change the Consultant for a team(s), you must send an e-mail request to msti@mstinstitute.org. Please include the following information:
 1. Name of Organization
 2. Name of Team(s) - (**as displayed on the MSTI web site**)
 3. Name of the Team's Supervisor
 4. Name of the Team's Current Consultant (if changing Consultant, please specify)
 5. City
 6. State
 7. Country

NOTE: Questions and requests, regarding the Enhanced Web Site can be e-mailed to msti@mstinstitute.org. E-mail are responded to within 2 business days. Please make sure that any e-mail requests are written clearly and in complete sentences. Make sure to provide as much information about the request, in your original e-mail. 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, you simply click 'Edit Case Enrollment' on the main menu and then pull up the case that you need to edit (this process is reviewed in the Basic Training session/guide) and 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, 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 System Manager can make the transfer for them.
- To transfer a therapist, simply edit the Therapist record and change the team name in the team drop down and then make sure to 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.

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Transferring Teams to New Consultants or Supervisors

- Only the MSTI Helpdesk can transfer teams to new Consultants/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 System Manager does have access to all data, from all supervisors, so they are able to run reports that include past data.
- If a new consultant is replacing a previous consultant, the system will automatically transfer all OPEN cases to the new consultant. CLOSED cases will remain under the previous consultant, which will prevent the new consultant from accessing that data. The System Manager does have access to all data, from all consultants, so they are able to run reports that include past data.