Patient Characteristics Survey 2023 Training

Thank you for joining us, the WebEx will begin shortly.

What is the Patient Characteristics Survey (PCS)?

- The PCS is the primary source of information about individuals served by the Mental Health system in New York State

- All public programs that provide Mental Health services in New York State participate

- Almost 206,000 individuals received Mental Health services in 4,000 programs during the PCS week in 2022

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Why do we need PCS?

- Information gathered is used to support implementation and evaluation of new programs

- PCS supplies required data for continued receipt of Federal funding through the Community Mental Health Block Grant (approx. $47 million in FFY 2022)

- PCS Tableau Data Visualizations offers rapid access to statewide data
  https://omh.ny.gov/omhweb/tableau/pcs.html

Important Definitions

- **Facility Survey (FS)** – conducted through MHPD **prior** to PCS, collects data about *providers* of mental health services

NOTE: *The Facility Survey is closed*. To make any changes, you will need to access MHPD directly.

- **Patient Characteristics Survey (PCS)** – conducted every other year, collects data about *consumers* of mental health services. This data is collected through the PCS application.

NOTE: *Consumers do not complete the survey*. Information for PCS is gathered from client records kept by your facility and entered by Staff or Personnel in the PCS application.

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Facility/Unit/Site

- **Facilities** are divided into **Units**, and some of these Units are further divided into **Sites** (FUS)
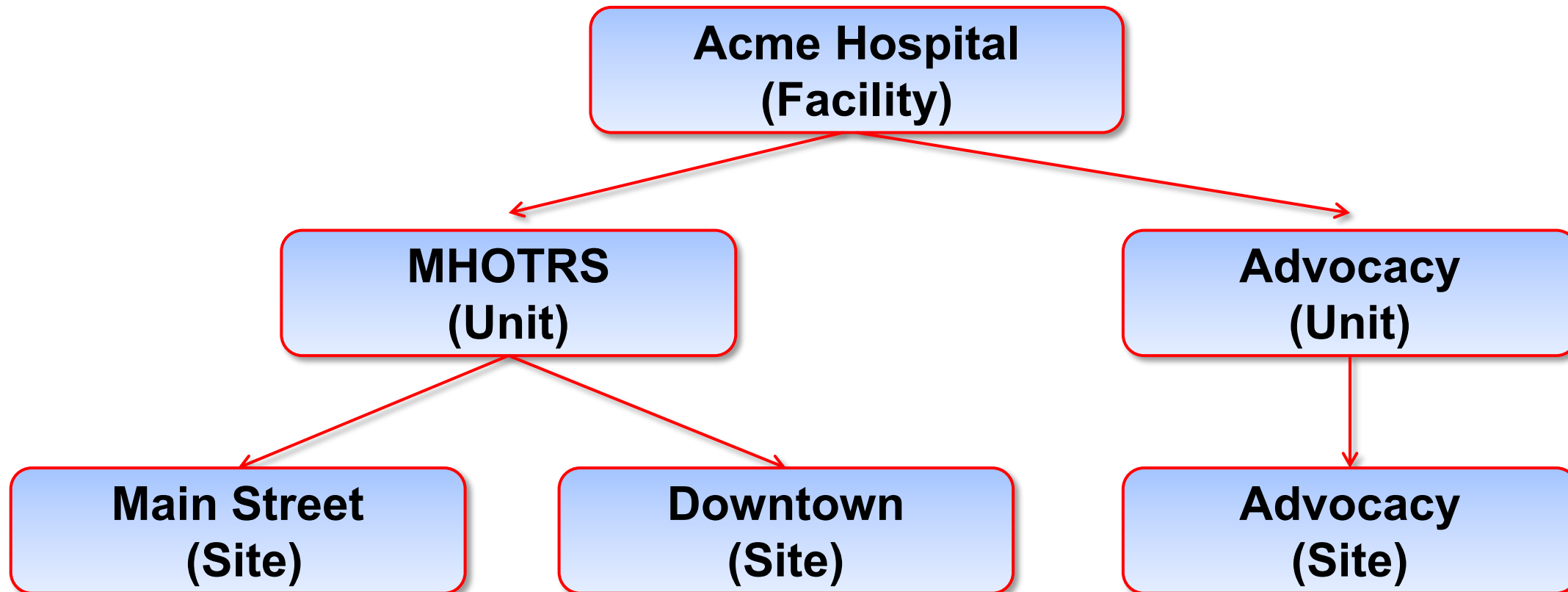
Important Definitions

- **PCS Coordinator** is the person at your facility who serves as OMH's contact during PCS

- **Security Manager** is the person at your facility who uses SMS to grant access to Supervisors and Submitters, to add users, and to reset passwords

NOTE: If your facility does not have a Security Manager, please contact us at PCS@omh.ny.gov or call 1-800-430-3586

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PCS Roles

- **PCS Submitter** – A User assigned to enter data and view/print reports in PCS for the Units or Sites with which the User is associated

- **PCS Supervisor** – A User allowed to see and enter data for ALL Unit/Sites at the Facility, and to upload and download Facility data. The Supervisor also certifies that the Facility has completed its data entry by locking Unit/Sites or explains why a particular Unit/Site has not provided data

Changes since the 2022 Application

Patient Characteristics Surveys (PCS) Home page
https://www.omh.ny.gov/omhweb/pcs/submissions/

Survey Resources

Preparing for the Survey

- 2023 PCS Calendar 📄 – Includes all of the important dates for 2023
- What's New for 2023 📄 – Summarizes changes to the form and application
- Survey Training
  - WebEx Recording
  - Presentation Slides 📄

PCS Reference Materials

~~informational purposes only – not for data col~~

2023 PCS Guidelines 📄 – Covers general reporting instructions (PDF)

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Application Changes

- Improved design and layout for survey questions

- Added filters to most of the grids in the application

- Enhanced security, the application now requires multifactor authentication as a second layer of verification

- Updated reports to support the new survey questions and responses

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OMH Website: http://www.omh.ny.gov
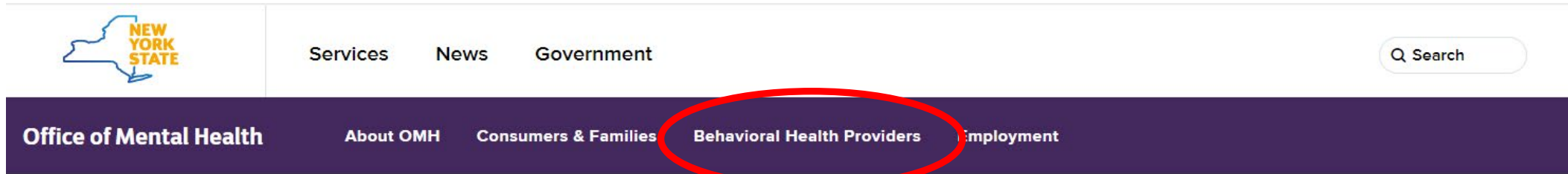
The OMH Website has a link to Resources & Tools…

Information for Providers

Resources & Tools:

Mental Health Provider Data Exchange (MHPD)
The MHPD supports an accurate and timely master directory of providers in the New York State public mental health system.

Patient Characteristics Survey
Information for providers on PCS survey timeframe, requirements, and obtaining access to the PCS application.

Security Management System (SMS)
Allows state and local facilities the ability to grant their staff access to secure OMH Web-based applications.

- Patient Characteristics Survey (PCS) Home Page, where you will find information about PCS, a user manual, and links to the application itself.

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Survey Resources

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The Data Entry Web Application

- 2023 PCS Application (User Identification and Password Required)
  Available: October 23 – December 6, 2023
- PCS -OKTA Multi-Factor Authentication (MFA) Guidance
  - User Guide for Internal Users 📄
  - User Guide for External Users 📄

PCS Reference Materials

- 2022 PCS User Manual 📄
- 2023 Survey Form 📄 (for informational purposes only – not for data collection)
- 2023 PCS Guidelines 📄 – Covers general reporting instructions (PDF)
- 2023 Using the Electronic Data Upload Feature 📄 - Contains information on:
  - File Layout 📄
  - Sample Upload File 📄
  - Validations 📄
  - Valid County Zip Code Combinations 📄
  - Valid ICD-10 DSM-5 Codes Sorted by Label 📄
  - Valid ICD-10 DSM-5 Codes Sorted by Codes 📄
  - Data Upload Notification Form
- 2023 Frequently Asked Questions (FAQS) 📄

Patient Characteristics Survey (PCS) Homepage

NOTE: PCS Practice Platform is available September 21 – October 16

Multifactor Authentication (MFS) Step-by-step instructions available on PCS Homepage

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PCS Application Home Page

User Feedback Survey

- When the PCS is completed, the User Feedback Survey helps us make future improvements

- Allows users to identify issues and concerns with the PCS Application

- "Notify Users" link will be made available on the PCS Supervisor Page

QUESTIONS?

Patient Characteristics Surveys (PCS) Home page
https://www.omh.ny.gov/omhweb/pcs/submissions/

If you have any questions, please send them to
pcs@omh.ny.gov

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