

Patient Characteristics Survey (PCS) Tableau Visualization

Quick Start Guide



**Office of
Mental Health**

Patient Characteristics Survey (PCS) Tableau

Overview

This dashboard allows the users to view and interact with New York State Office of Mental Health (OMH) Patient Characteristics Survey (PCS) data. The PCS is conducted every two years, and collects demographic, clinical, and service-related information for each person who receives a service in the NYS public mental health system during a specified one-week period. All organizations and programs that are licensed, funded, and/or operated by OMH are required to report PCS data.

The PCS Tableau is available to view on the OMH website and does not contain Protected Health Information (PHI). It can be accessed through the following link:

<https://omh.ny.gov/omhweb/tableau/pcs.html>

- The link works best on Chrome, Edge, or Safari web browsers and on a desktop.
- Please see Figure 1. to see the landing page of this dashboard.

Figure 1. Patient Characteristics Survey Tableau: Landing Page



This dashboard has 11 tabs (Figure 2):

1. **Landing:** This is where users land when navigating to the PCS Tableau
2. **About:** This tab provides a summary about the PCS and other relevant resources including survey instrument and guidelines as well as steps to download the data
3. **Report Descriptions:** This tab summarizes the information and filters provided in each of the reports
4. **R1. Demographics:** This report displays demographic variables of the OMH population as annual estimates by PCS survey year.
5. **R2. Social Determinants:** This report displays social determinants variables of the OMH population as annual estimates by PCS survey year.
6. **R3. Clinical & Functioning:** This report displays clinical & functioning characteristics of the OMH population as annual estimates by PCS survey year.
7. **R4. Geographic Distribution:** This report displays the geographic distribution of the OMH population.
8. **R5. Demographic Trends:** This report displays selected demographics characteristics of the OMH population as annual estimates by PCS survey year as trends over time.
9. **R6. Social Determinant Trends:** This report displays selected social determinants of the OMH population as annual estimates by PCS survey year as trends over time.
10. **R7. Clinical & Functioning Trends:** This report displays selected clinical and functioning characteristics of the OMH population as annual estimates PCS survey year as trends over time.
11. **R8. Data Download:** This tab displays the data included in this dashboard in the form of a table and can be exported by users.

Figure 2. PCS Tableau Tabs



User Tip: Scroll to the bottom of the page and click on the full screen button to access the dashboard in full-screen mode (Figure 3).

Figure 3. Viewing the Tableau in Full Screen mode



Report 1. Demographics

This tab displays Demographic variable of the OMH population as annual estimates by PCS survey year.

- The report can be filtered by (Figure 4):
 - **Survey Year:** 2013, 2015, 2017, 2019, 2022, 2023
 - **Geo-Perspective:** Provider, Residence
 - **Region Type:** OMH Region, RPC Region
 - **Statewide/Region:** Statewide, 5 OMH Regions, 11 RPC Regions
- This tab has various visualizations that show distribution of the OMH population across these demographic characteristics (Figure 5):
 - **Age Group:** 0-20 years old, 21-64 years old, 65 and older
 - **Race Groups:** White, Black/African American, Multi-Racial, Asian, Native Hawaiian/Other Pacific Islander, Other Race, Unknown
 - **Gender:** Male, Female, Non-Binary
 - **Hispanic Ethnicity:** Hispanic/Latino, Not Hispanic/Latino, Unknown
 - **Gender Identity:** Cisgender, Transgender Man, Transgender Woman, Non-Binary, Gender Non-Conforming, Client Did not Answer, Unknown
 - **Major Languages:** English, Spanish, Indo-European, Afro-Asiatic, Asian and Pacific Islander, All Other Languages, Unknown
 - **Sexual Orientation:** Straight, Bisexual, Lesbian or Gay, Unknown
- Users can hover over the visualizations to see an informational tooltip (Figure 6).

Figure 4. R1. Demographics: Filters

Demographics - Annual Estimates

This report displays annualized version of demographic variables of the OMH population by survey year.

Survey Year	Geo-Perspective	Region Type	Statewide/Region
2023	Provider	OMH Region	Statewide

Figure 5. R1. Demographics: Data Visualizations

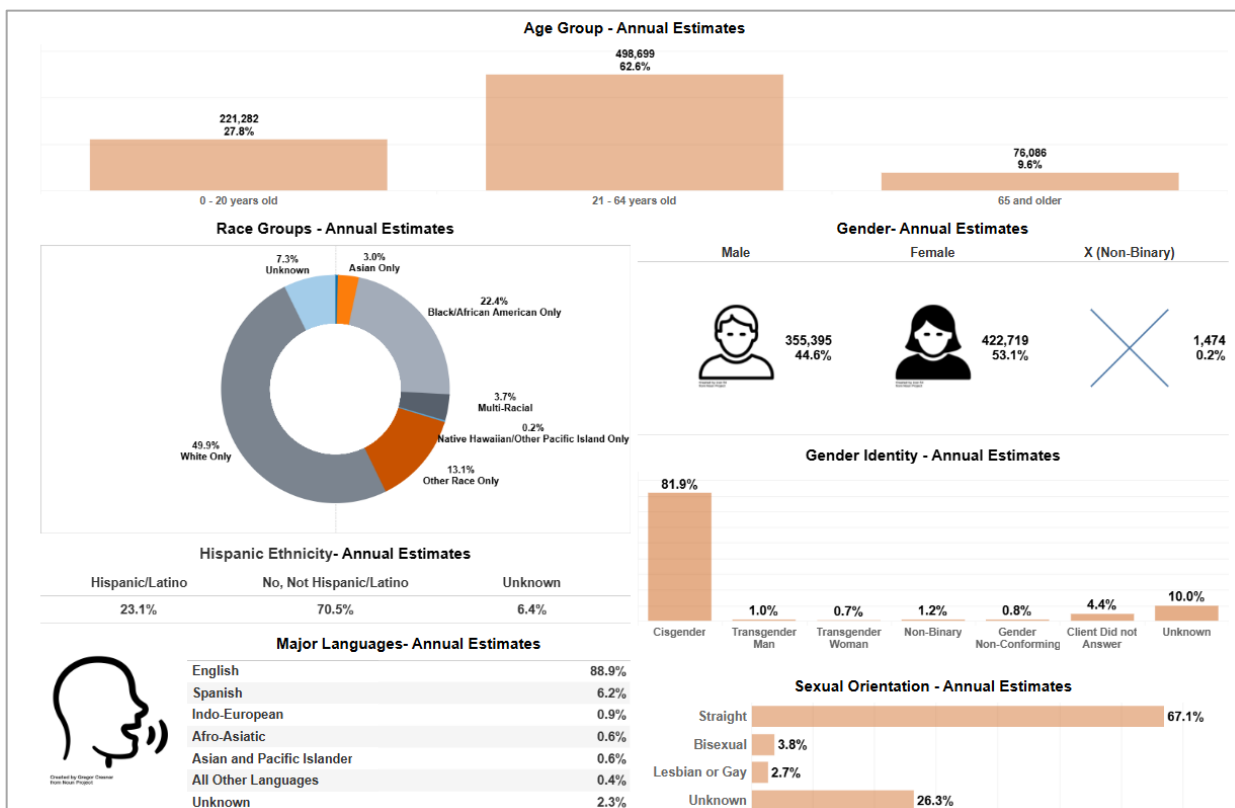
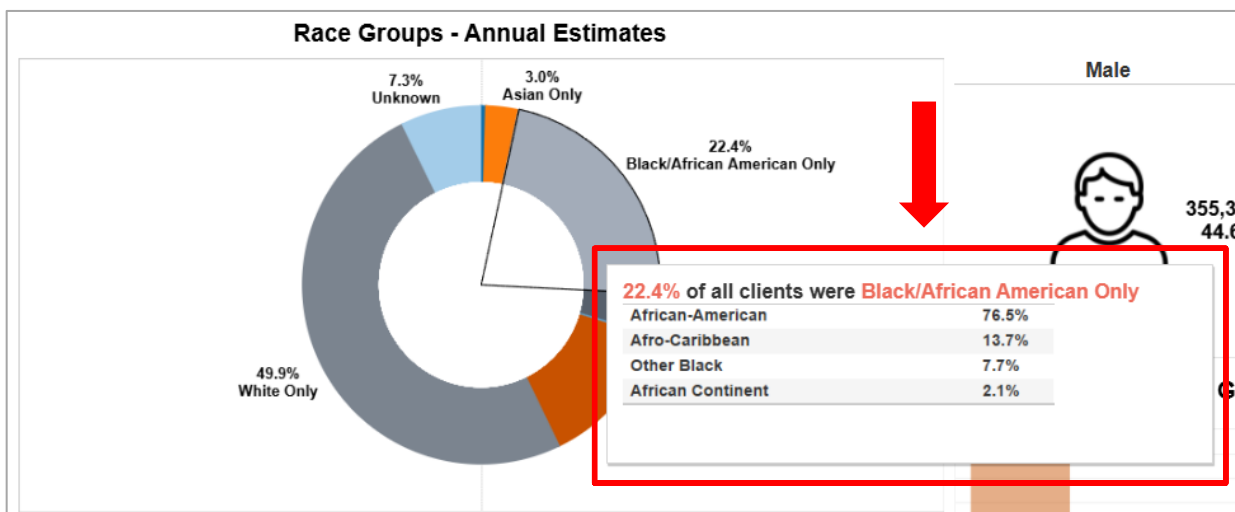


Figure 6. R1. Demographics Report: Informational Tooltip

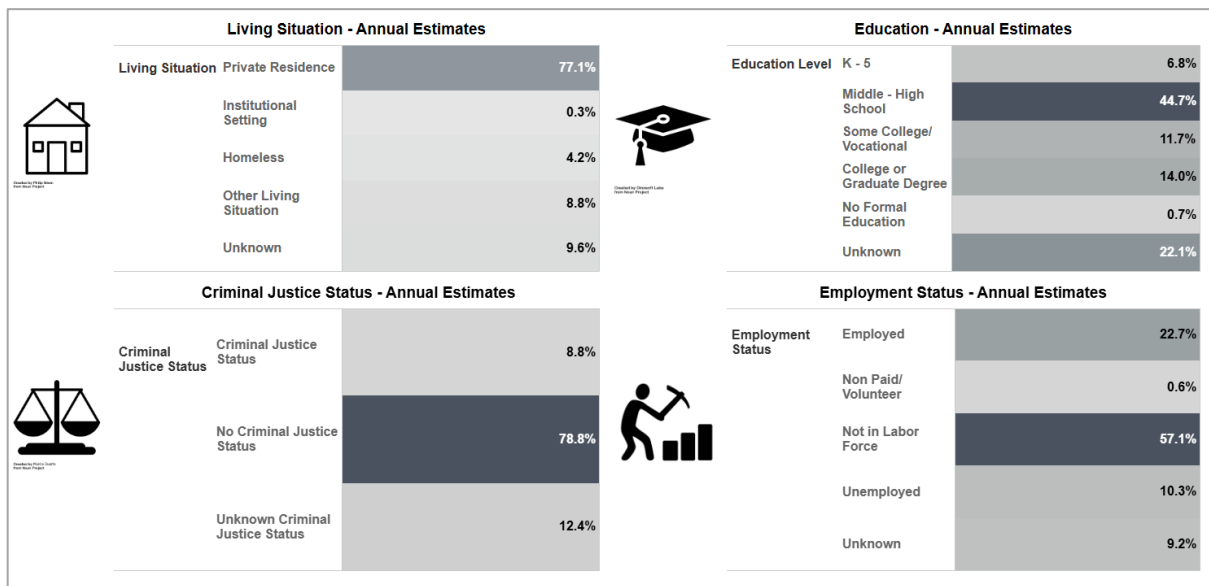


Report 2. Social Determinants

This tab displays Social Determinant variables of the OMH Population.

- The report can be filtered by:
 - Survey Year:** 2013, 2015, 2017, 2019, 2022, 2023
 - Geo-Perspective:** Provider, Residence
 - Region Type:** OMH Region, RPC Region
 - Statewide/Region:** Statewide, 5 OMH Regions, 11 RPC Regions
- This tab has various visualizations that show distribution of the OMH population across the following social determinant variables (Figure 7):
 - Living Situation:** Private Residence, Institutional Setting, Homeless, Other Living Situation, Unknown
 - Education Level:** K-5, Middle – High School, Some College/Vocational, College or Graduate Degree, No Formal Education, Unknown
 - Criminal Justice Status:** Criminal Justice Status, No Criminal Justice Status, Unknown Criminal Justice Status
 - Employment Status:** Employed, Non-Paid/Volunteer, Not in Labor Force, Unemployed, Unknown
- Users can hover over the visualizations to see an informational tooltip

Figure 8. R2. Social Determinants Report: Data Visualizations

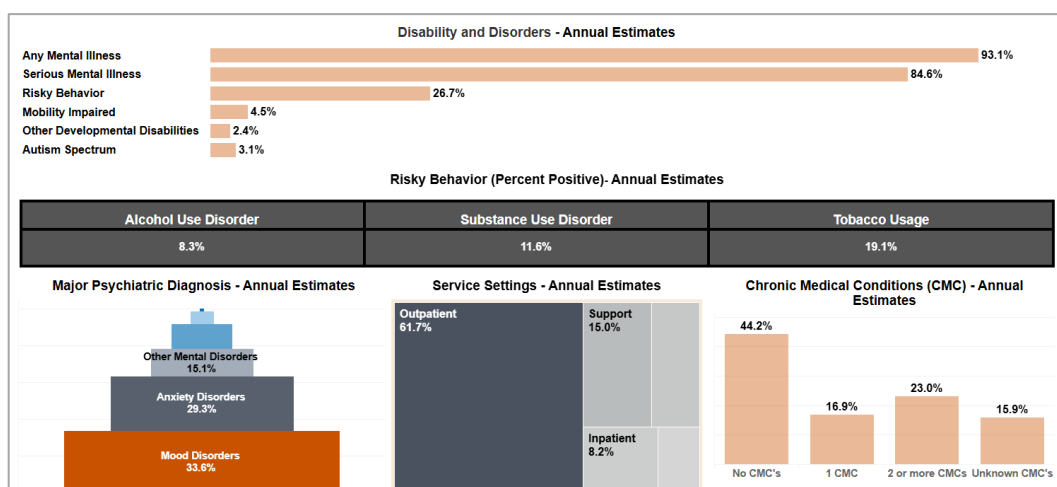


Report 3. Clinical & Functioning

This tab displays Clinical and Functioning Characteristics of the OMH Population.

- The report can be filtered by:
 - Survey Year:** 2013, 2015, 2017, 2019, 2022, 2023
 - Geo-Perspective:** Provider, Residence
 - Region Type:** OMH Region, RPC Region
 - Statewide/Region:** Statewide, 5 OMH Regions, 11 RPC Regions
- This tab has various visualizations that show distribution of the OMH Population across the following clinical and functioning characteristics (Figure 9):
 - Disability and Disorders:** Any Mental Illness, Serious Mental Illness, Risky Behavior, Mobility Impaired, Other Developmental Disabilities, Autism Spectrum
 - Risky Behavior:** Alcohol Use Disorder, Substance Use Disorder, Tobacco Usage
 - Major Psychiatric Diagnosis:** Mood Disorders, Anxiety Disorders, Other Mental Disorders, Schizophrenic Disorders, Unknown, Non-Mental Disorders
 - Service Settings:** Outpatient, Support, Inpatient, Emergency, Residential
 - Chronic Medical Conditions (CMC):** No CMCs, 1 CMC, 2 or more CMCs, Unknown CMCs
- Users can hover over the visualizations to see an informational tooltip

Figure 9. R3. Clinical and Functioning Report: Data Visualizations



Report 4. Geographic Distribution

This tab displays geographic distribution of the OMH Population in New York State across various characteristics.

- The report can be filtered by (Figure 10):
 - **Survey Year:** 2013, 2015, 2017, 2019, 2022, 2023
 - **Characteristics:** Demographic, Social Determinants, Clinical and Functioning
 - Categories within Demographic, Social Determinants, and Clinical and Functioning variables
 - Note: This filter option lets the user select one of the categories, and the options available here change depending on the selection of Characteristics filter.

Figure 10. R4. Geographic Distribution Report: Filter Options

The image shows a vertical stack of three filter sections. The top section is titled 'Survey Year' and contains a dropdown menu with '2023' selected. The middle section is titled 'Characteristics' and contains a dropdown menu with 'Demographics' selected. The bottom section is a large light blue box containing a list of categories, each with a radio button. The first category, '< 21 years old', is selected.

Survey Year
2023

Characteristics
Demographics

☒ < 21 years old
☐ 21 - 64 years old
☐ > 64 years old
☐ White
☐ Black
☐ Asian
☐ Multi-Racial
☐ Other Race
☐ Male
☐ Female
☐ Hispanic Ethnicity
☐ LGBT
☐ English Preferred
☐ Non-English Preferred

- This tab has a map of New York State with county boundaries and shows distribution (rate) of different data elements aggregated at county level. There is a zoomed-in map of New York City Region on the bottom right of the NYS Map (Figure 11).
- The map is accompanied by two tables showing Top 5 and Bottom 5 counties for the selected characteristics (Figure 12).
- Users can hover over the visualizations to see an informational tooltip

Figure 11. R4. Geographic Distribution Report: New York State and New York City Map

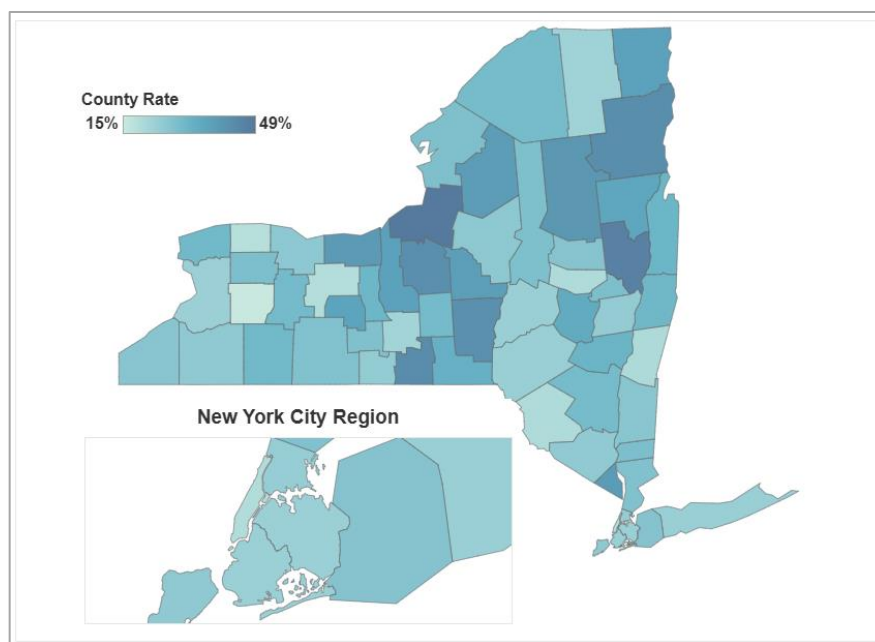


Figure 12. R4. Geographic Distribution Report: Data Table (Top and Bottom Counties)

Top 5 Counties	
OSWEGO	49%
SARATOGA	46%
TIOGA	43%
ESSEX	43%
ONONDAGA	42%
Bottom 5 Counties	
MONTGOMERY	20%
NEW YORK	19%
ONTARIO	19%
ORLEANS	18%
WYOMING	15%

Report 5. Demographic Trends

This tab displays selected demographic characteristics of the OMH Population as trends over time.

- The report can be filtered by:
 - **Region Type:** OMH Region, RPC Region
 - **Statewide/Region:** Statewide, 5 OMH Regions, 11 RPC Regions
 - **Demographics:** Total Clients, Gender Identity, Race, Hispanic Ethnicity
 - **Age Group:** Total Clients, Under 21, 21 – 64 years old, 65 and older, Unknown
 - **Gender:** Total Clients, Male, Female
- This tab displays annual estimate of clients served by survey year for the selected demographics using a trend line (Figure 13).
 - Note: 2022 timepoint reflects delayed 2021 data collection.
- Users can click on each point to view annual estimates by demographic category. These estimates are provided in the form of a data table (Figure 14).

Figure 13. R5. Demographic Trends Report: Trend Line

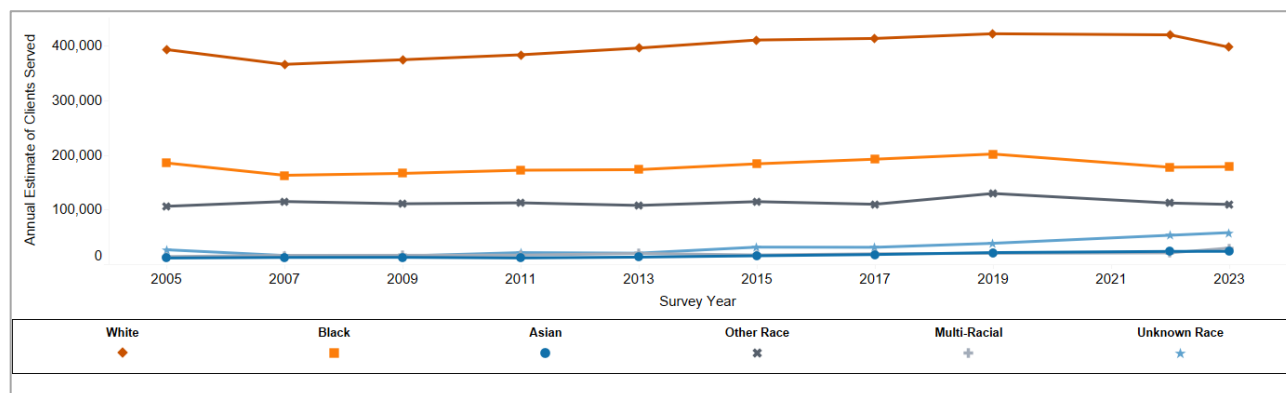
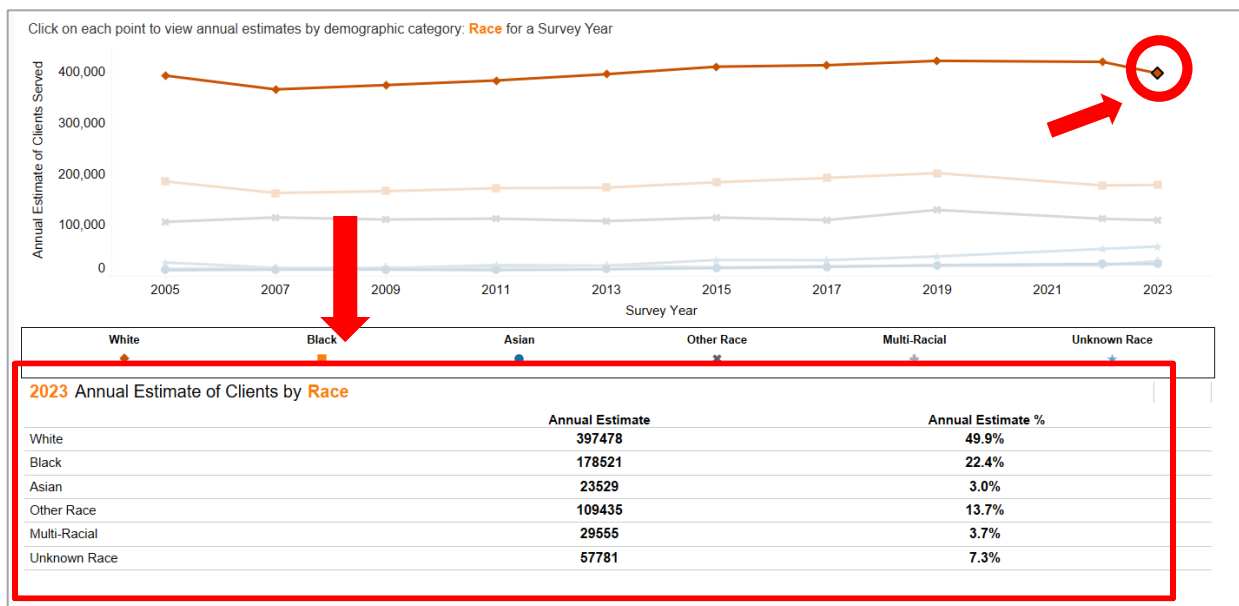


Figure 14. R5. Demographic Trends Report: Data Table for the selected point

Report 6. Social Determinant Trends

This tab displays selected Social Determinants characteristics of the OMH Population as trends over time.

- The report can be filtered by:
 - Region Type:** OMH Region, RPC Region
 - Statewide/Region:** Statewide, 5 OMH Regions, 11 RPC Regions
 - Social Determinants:** Total Clients, Living Situation, Employment Status, Education Level, Cash Assistance or Benefits, Type of Health Insurance, Criminal Justice Status
 - Age Group:** Total Clients, Under 21, 21 – 64 years old, 65 and older, Unknown
 - Gender:** Total Clients, Male, Female
- This tab displays annual estimate of clients served by survey year for the selected social characteristics using a trend line.
 - Note: 2022 timepoint reflects delayed 2021 data collection.
- Users can click on each point to view annual estimates by selected social determinant category. These estimates are provided in the form of a data table.

Report 7. Clinical & Functioning Trends

This tab displays selected Clinical and Functioning characteristics of the OMH population as trends over time.

- The report can be filtered by:
 - Region Type: OMH Region, RPC Region
 - Statewide/Region: Statewide, 5 OMH Regions, 11 RPC Regions
 - Clinical and Functioning: Total Clients, Chronic Medical Conditions, Tobacco Usage, Treatment for Tobacco Usage, SMI/SED, Primary Major Diagnosis Group
 - Program Category: Total Clients, Emergency, Inpatient, Outpatient, Residential, Support
 - Age Group: Total Clients, Under 21, 21 – 64 years old, 65 and older, Unknown
 - Gender: Total Clients, Male, Female
- This tab annual estimate of clients served by survey year for the selected Clinical and Functioning characteristics using a trend line.
 - Note: 2022 timepoint reflects delayed 2021 data collection.
- Users can click on each point to view annual estimates by selected clinical and functioning category. These estimates are provided in the form of a data table.

Report 8. Data Download

This tab allows users to export the annualized estimates data for a specific PCS survey year.

- The data displayed here can be filtered by:
 - **Survey Year:** 2013, 2015, 2017, 2019, 2022, 2023
 - **Geo-Perspective:** Provider, Residence
 - **Region Type:** OMH Region, RPC Region
 - **Statewide/Region:** Statewide, 5 OMH Regions, 11 RPC Regions
 - **Variable Group:** All variables in the dashboard.
- This tab displays the data in a tabular form (Figure 15).

- Users can scroll to the bottom of this tab and click export data and select their desired format to download the data (Figure 16).

Figure 15. R8. Data Download Tab

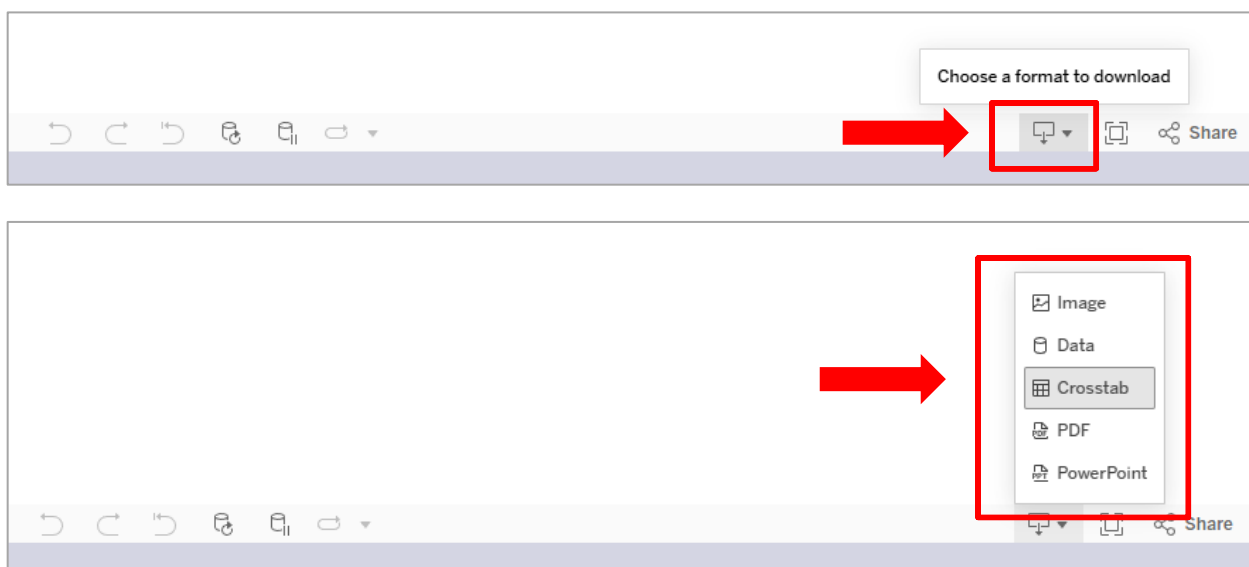
Distribution of PCS Items - Annual Estimates

This tab allows the exporting of the annual estimates for a specific survey year.

Survey Year	Geo-Perspective	Region Type	Statewide/Region	Variable Group
2023	Provider	OMH Region	Statewide	(All)

Year	Region Name	Characteristics		
2023	Statewide	Age Group	0 - 20 years old	27.8%
			21 - 64 years old	62.6%
			65 and older	9.6%
			Unknown	<1%
		Alcohol Use Disorder	Yes	8.3%
			No	79.5%
			Unknown	12.2%
		Any Mental Illness	Yes	93.1%
			No	4.1%
			Unknown	2.8%
		Autism Spectrum	Yes	3.1%
			No	83.5%
			Unknown	13.4%
		Chronic Medical Condition	1 CMC	16.9%
			2 or more CMCs	23.0%
			None	44.2%
			Unknown	15.9%
		Criminal Justice Status	Criminal Justice Status	8.8%
			No Criminal Justice Status	78.8%
			Unknown Criminal Justice Status	12.4%
		Dual Insurance	Yes	9.7%
			No	81.3%
			Unknown	8.9%
		Education Level	Pre-K to Fifth Grade	6.8%
			Middle School to High School	44.7%
			Some College	11.7%
			College or Graduate Degree	14.0%
			No Formal Education	<1%
			Other	1.2%
			Unknown	20.9%
		Employment Status	Employed	22.7%
			Non-Paid/Volunteer	<1%
			Unemployed and not looking for work	57.1%
			Unemployed, Looking For Work	10.3%
			Unknown Employment Status	9.2%

Figure 17. R8. Exporting the Data



Technical Assistance

If you have any questions about using the Dashboard or the included measures, please send an email to our technical assistance helpdesk:

DataOPHE@omh.ny.gov

Latest Survey Form can be found here:

https://omh.ny.gov/omhweb/pcs/submissions/pcs_survey_form.pdf

Survey Guidelines:

<https://omh.ny.gov/omhweb/pcs/submissions/guidelines.pdf>

Copies of earlier versions of the PCS Forms can be requested from

pcs@omh.ny.gov