NEW YORK STATE | Office of Mental Health

FACILITY SURVEY

In MHPD

Office of Population Health and Evaluation
New York State Office of Mental Health
March 2025

Before We Begin

- **Questions?** Send them to our dedicated mailbox MHPD@omh.ny.gov

- **Training Materials:**
  - A copy of today's training slides and the FAQ will be posted on the MHPD homepage https://omh.ny.gov/omhweb/mhpd/
  - The FAQ page will be updated periodically with answers to your inquiries.

Facility Survey in (MHPD) vs. Patient Characteristics Survey (PCS): Key Differences

Feature	Facility Survey (MHPD)	Patient Characteristics Survey (PCS)
Purpose	Enables facilities to update and maintain accurate information for all facility, program, site, and contact details	The PCS is conducted every two years, and collects demographic, clinical, and service-related information for each person who receives a public mental health service during a specified one-week period.
Survey Location	MHPD homepage https://omh.ny.gov/omhweb/mhpd/	PCS homepage https://omh.ny.gov/omhweb/pcs/submissions/
Timeline	April 1 to April 30	October 20 – November 27
Survey Completed By	All Facilities that receive OMH funding and is recorded within the Mental Health Provider Directory (MHPD) system.	All Facilities in New York that receive OMH funding or have OMH licensed programs and provide direct services.
Access	Contact your Security Manager – MHPD Provider Admin or User	Contact your Security Manager – PCS Supervisor or Submitter

Calendar of Events for Patient Characteristics Survey (PCS) 2025

Date	Activity
March 25 & March 27	Webinar trainings for Facility Survey.
April 1 – April 30	Each facility will complete the "Facility Survey" tab in the web-based Mental Health Provider Directory (MHPD).
Mid-August	Webinar trainings for Patient Characteristics Survey (PCS) Module in the Security Management System (SMS)
August 11 – September 18	Each facility's Security Manager will grant its staff access to the web-based Patient Characteristics Survey (PCS) using the Security Management System (SMS).
Mid-September	Webinar trainings for PCS.
September 17 – October 1	A PCS Practice Platform will be available to staff who have been granted access to the PCS by their Security Manager. (Practice data will be deleted prior to the actual PCS start date of October 20th.)
October 20 – October 26	The PCS week (report clients served during this week)
October 20 – November 27	Each Mental Health provider will report data for the clients it served during the PCS week
November 28 – December 10	Delinquent providers will be contacted by OMH Central and Field Offices
December 10	Last day that the PCS application is open for data entry, edit, file upload, data import, lock units or request waivers for programs.
June 1	Final reports will be available.

Facility Survey

FACILITY SURVEY – Discussion Points

- Overview
- Getting started with the survey
- Facility-wide review
- Program review
- Completion of the survey and post-survey edits

The purpose…

- The Facility Survey allows your facility to update all facility, program, site, and contact information in MHPD in preparation for the Patient Characteristics Survey (PCS).

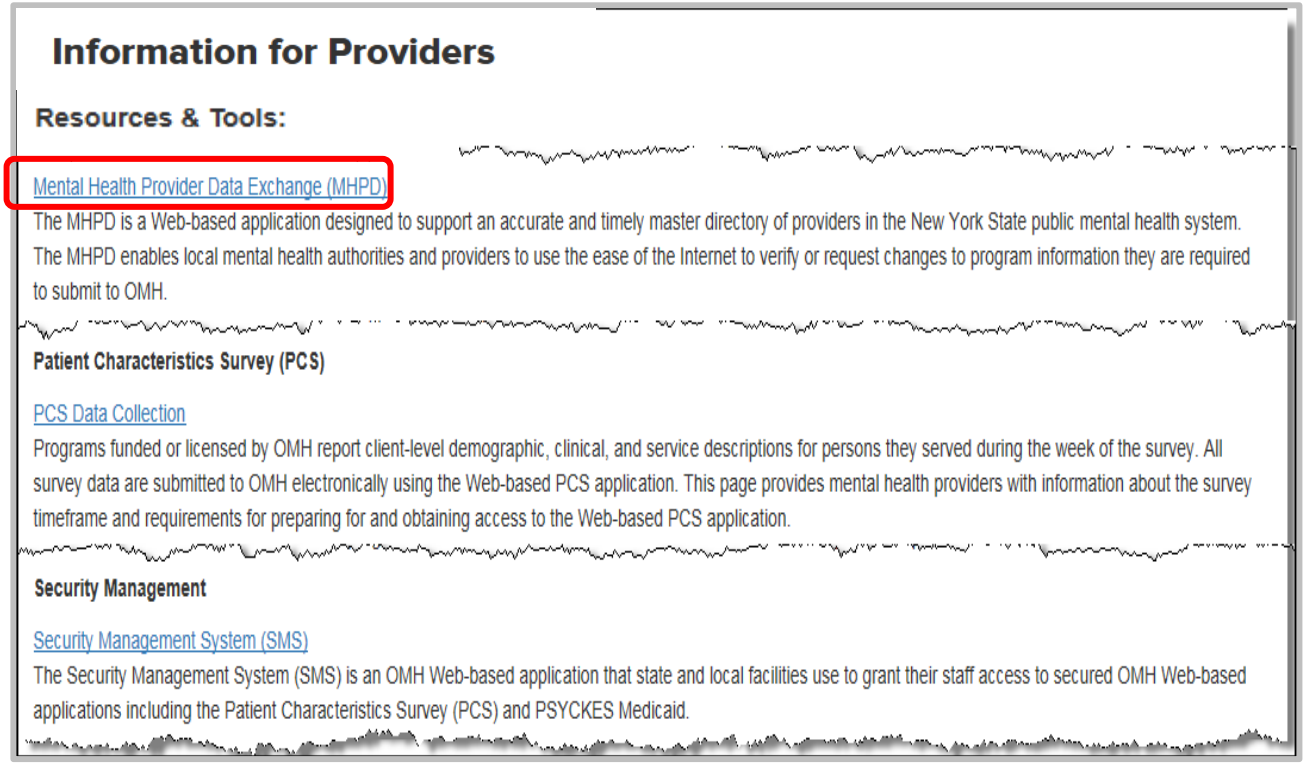
- Your facility designates a PCS Coordinator, who is the point person between your facility and OMH during the PCS process.

- Updating MHPD also helps keep OMH informed of your programs and of the necessary contact information that allows us to get important information to you.

How to Access the MHPD homepage

OMH Website - https://www.omh.ny.gov

Very Useful Links



Information for Providers

Resources & Tools:

Mental Health Provider Data Exchange (MHPD)

The MHPD is a Web-based application designed to support an accurate and timely master directory of providers in the New York State public mental health system. The MHPD enables local mental health authorities and providers to use the ease of the Internet to verify or request changes to program information they are required to submit to OMH.

Patient Characteristics Survey (PCS)

PCS Data Collection

Programs funded or licensed by OMH report client-level demographic, clinical, and service descriptions for persons they served during the week of the survey. All survey data are submitted to OMH electronically using the Web-based PCS application. This page provides mental health providers with information about the survey timeframe and requirements for preparing for and obtaining access to the Web-based PCS application.

Security Management

Security Management System (SMS)

The Security Management System (SMS) is an OMH Web-based application that state and local facilities use to grant their staff access to secured OMH Web-based applications including the Patient Characteristics Survey (PCS) and PSYCKES Medicaid.

MHPD HOME PAGE

Mental Health Provider Data Exchange (MHPD)

DESCRIPTION

The Mental Health Provider Data Exchange (MHPD) is an online master provider directory of the New York State public mental health system. It offers accurate and up-to-date information.

Local mental health authorities and providers can use the MHPD to verify or request changes to program information required by OMH. Local mental health authorities can use the MHPD to review access to services across their counties and regions.

REVIEW PROCESS

Who is part of the Review Process:
Program Administrators at:

- OMH Central Office
- OMH Field Offices
- local mental health authorities

Each request prompts the MHPD to send notification to requestor and other key parties. The key parties are able to correspond with each other within the MHPD application.

Next Steps:
When an administrator approves or denies a request, MHPD sends a notice to each of the parties. If a request is denied, the facility may resubmit it with more information for further review.

Using MHPD, facilities can assign a Primary Facility Contact to receive notifications.

RESOURCES

- Getting Access to MHPD via the Security Management System (SMS)
- MHPD (**Restricted - User ID and Password Required**)
- Facility Survey Training
  - Slides
  - Recording
- Manuals
- Frequently Asked Questions (FAQs)
- Definition of Terms
- Find a Mental Health Program In Your Community

Comments or questions about the information on this page can be directed to the Surveillance & Surveys Unit.

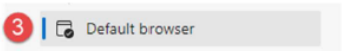
Running MHPD in MS Edge

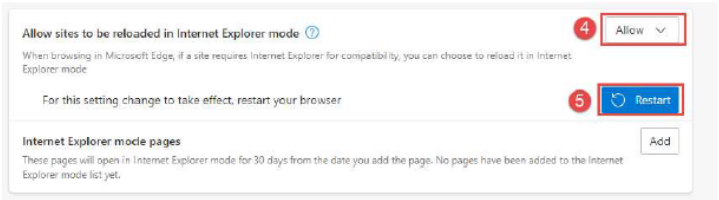
MHPD is only compatible with Internet Explorer (IE) Browser!

Allow IE Mode Settings

A. Open Microsoft Edge and click on the 3 dots in the upper right-hand corner and in the menu click *Settings*.

B. Click on *Default browser* in the left side menu and change the "Allow sites to be reloaded in Internet Explorer mode" dropdown to *Allow*.
   a. Note: If *Default Browser* and/or the *Allow* drop down are not available/disabled, you will need to reach out to your agency's IT department to enable it.
   b. Click the blue ***Restart*** button for the settings to take effect. This button will not appear until the drop down is changed to *Allow*.



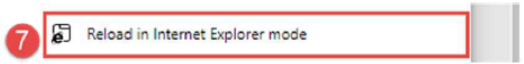


Running MHPD in MS Edge

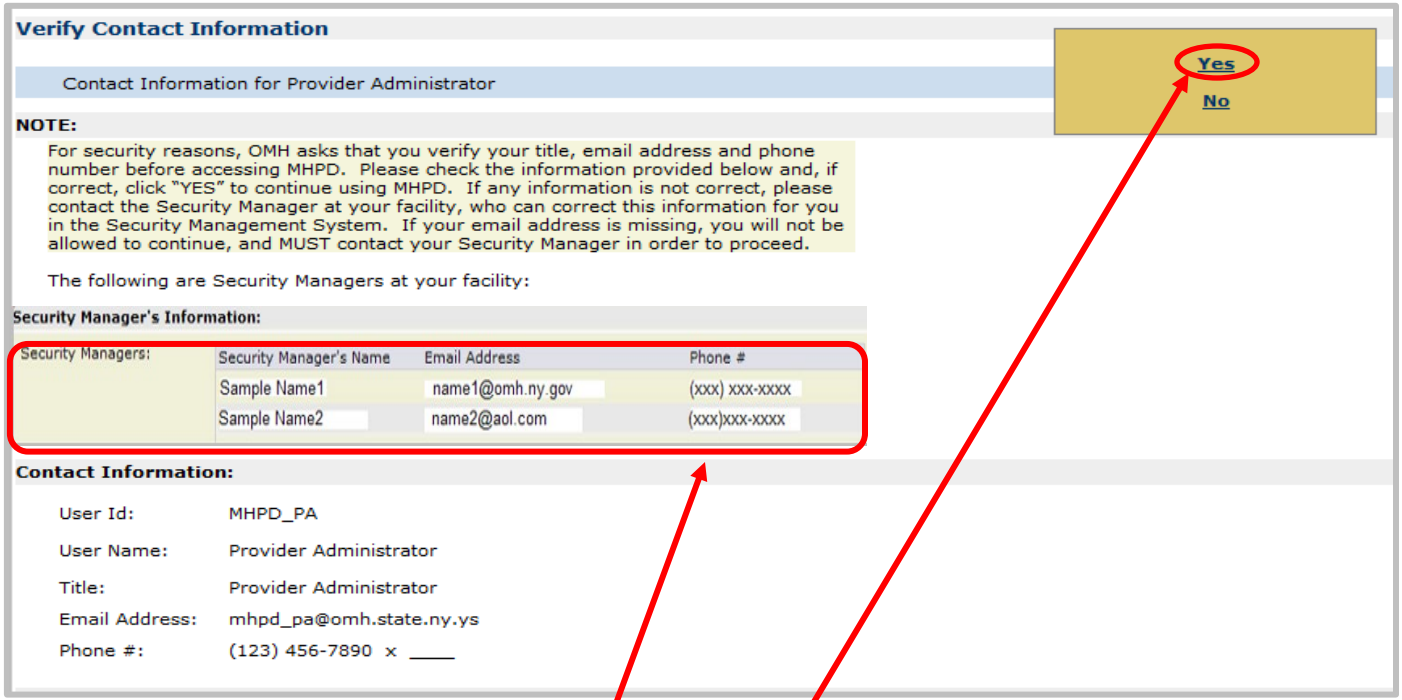
Reload in Internet Explorer mode

C. To access, NIMRS, CAIRS or MHPD open a Microsoft Edge and visit https://mhprovider.omh.ny.gov/websalute/legal.asp

D. **Click on the 3 dots** in the upper right-hand corner, then click ***Reload in Internet Explorer Mode***.



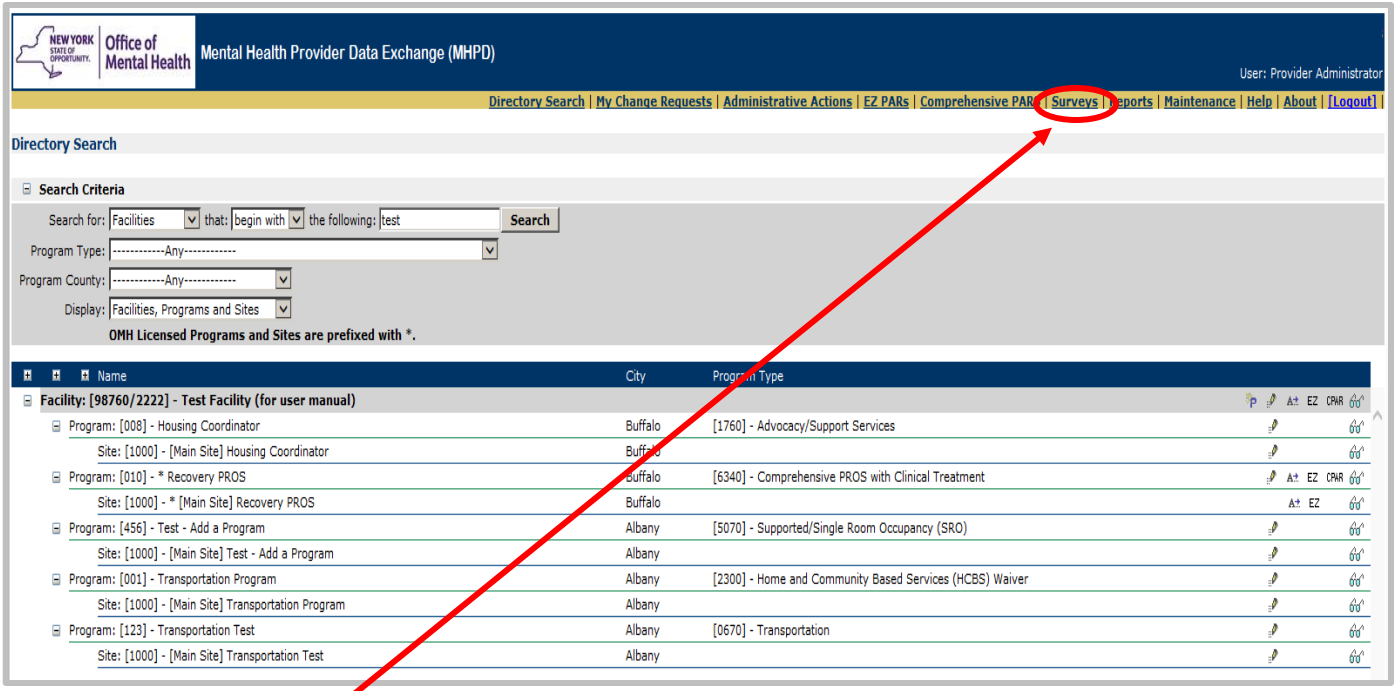
When you log in to MHPD…



If there are errors in your contact information, contact your Security Manager to make corrections in SMS.

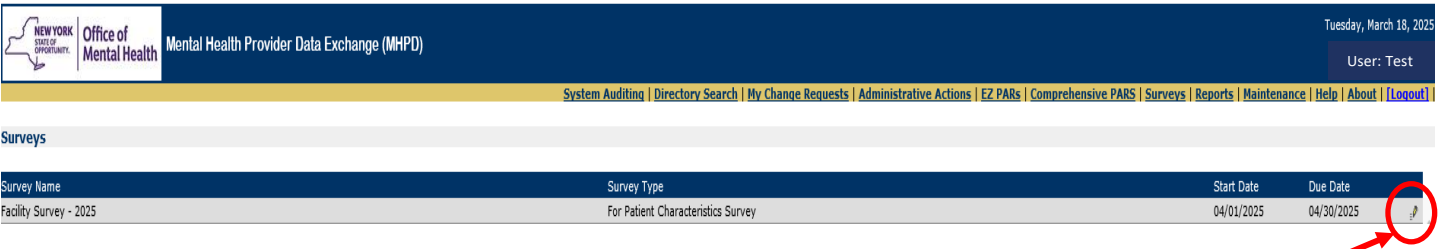
Click Yes to move past the Verify Contact Information

Getting to the Facility Survey



Click the Survey tab in the gold toolbar to get to the Survey page.

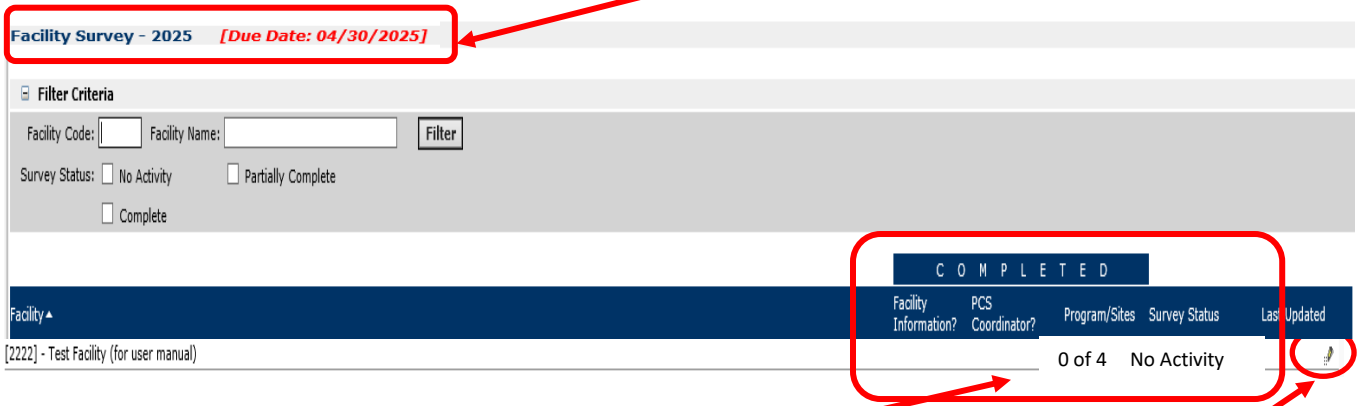
Surveys Page



Select the pencil icon to access the Facility Survey

Facility Survey

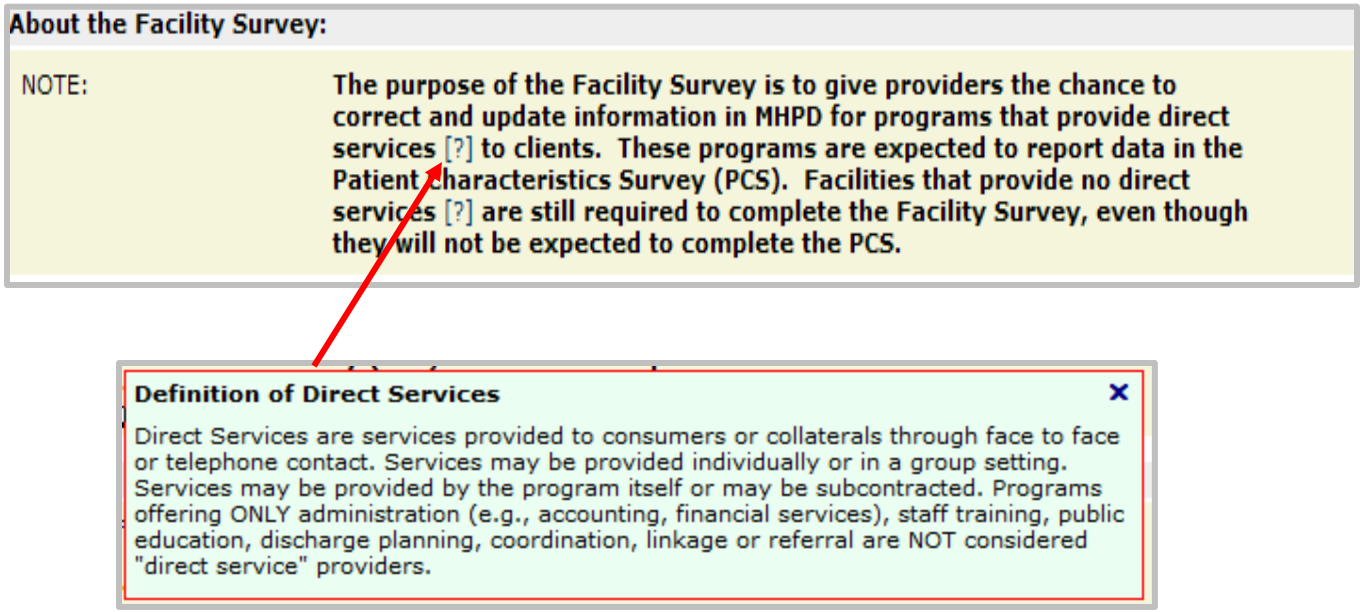
Facility Survey takes place April 1st – 30th



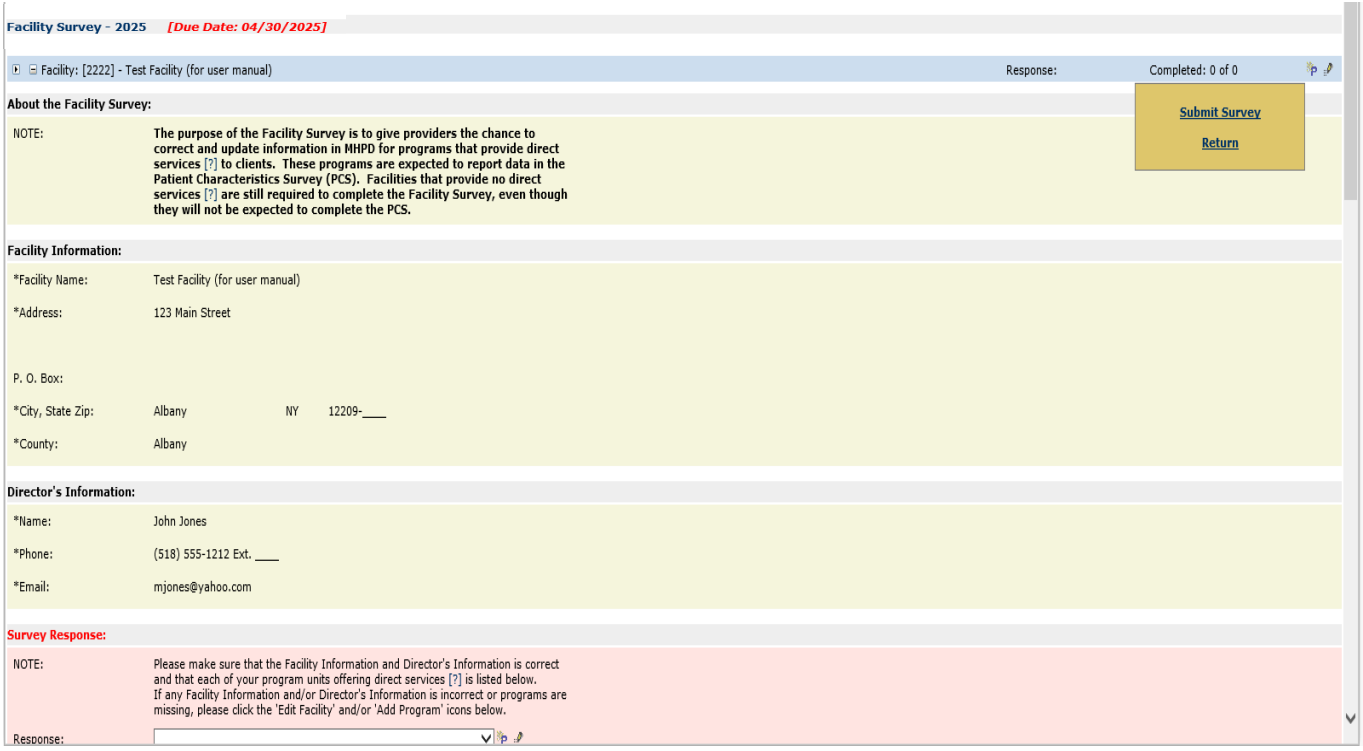
Status bar indicates completion of Facility Survey.

Click the pencil icon to proceed into the survey.

Programs Required to Report in PCS



Facility Information



Facility Survey - 2025 *[Due Date: 04/30/2025]*

Facility: [2222] - Test Facility (for user manual) Response: Completed: 0 of 0

Submit Survey

Return

About the Facility Survey:

NOTE: **The purpose of the Facility Survey is to give providers the chance to correct and update information in MHPD for programs that provide direct services [?] to clients. These programs are expected to report data in the Patient Characteristics Survey (PCS). Facilities that provide no direct services [?] are still required to complete the Facility Survey, even though they will not be expected to complete the PCS.**

Facility Information:

*Facility Name: Test Facility (for user manual)

*Address: 123 Main Street

P. O. Box:

*City, State Zip: Albany NY 12209-___

*County: Albany

Director's Information:

*Name: John Jones

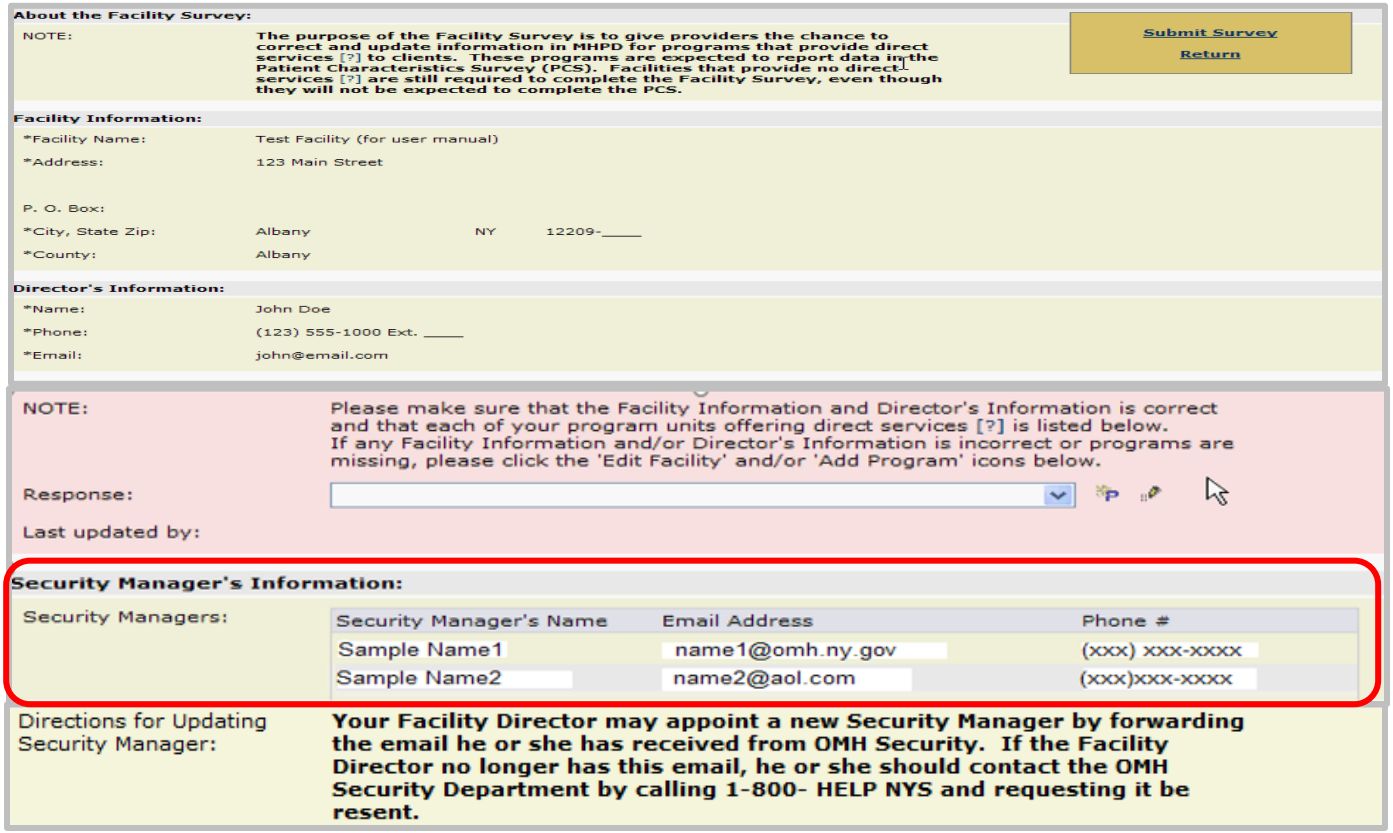
*Phone: (518) 555-1212 Ext. ___

*Email: mjones@yahoo.com

Survey Response:

NOTE: Please make sure that the Facility Information and Director's Information is correct and that each of your program units offering direct services [?] is listed below. If any Facility Information and/or Director's Information is incorrect or programs are missing, please click the 'Edit Facility' and/or 'Add Program' icons below.

Response:



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Submit Survey

Return

Facility Information:

*Facility Name: Test Facility (for user manual)

*Address: 123 Main Street

P. O. Box:

*City, State Zip: Albany NY 12209-____

*County: Albany

Director's Information:

*Name: John Doe

*Phone: (123) 555-1000 Ext. ____

*Email: john@email.com

NOTE: Please make sure that the Facility Information and Director's Information is correct and that each of your program units offering direct services [?] is listed below. If any Facility Information and/or Director's Information is incorrect or programs are missing, please click the 'Edit Facility' and/or 'Add Program' icons below.

Response:

Last updated by:

Security Manager's Information:

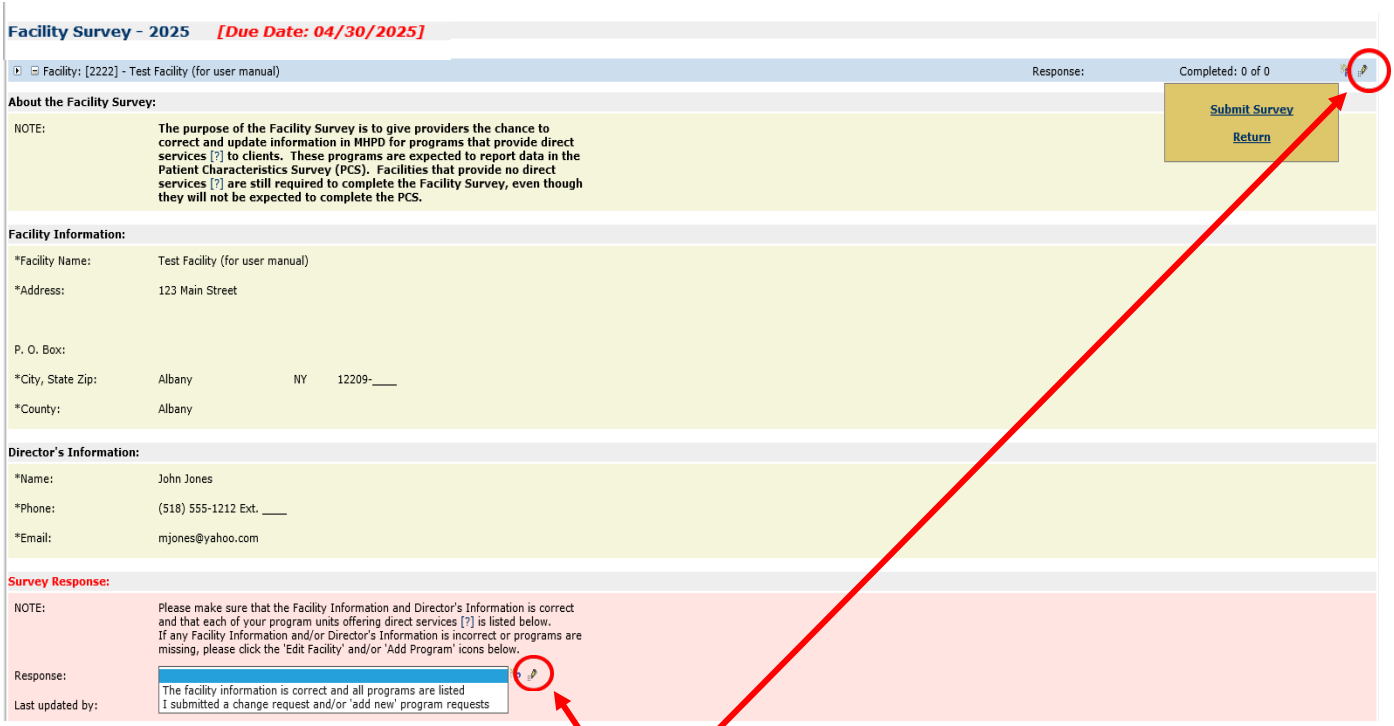
Security Managers:

Security Manager's Name	Email Address	Phone #
Sample Name1	name1@omh.ny.gov	(xxx) xxx-xxxx
Sample Name2	name2@aol.com	(xxx)xxx-xxxx

Directions for Updating Security Manager:

Your Facility Director may appoint a new Security Manager by forwarding the email he or she has received from OMH Security. If the Facility Director no longer has this email, he or she should contact the OMH Security Department by calling 1-800- HELP NYS and requesting it be resent.

Facility Information

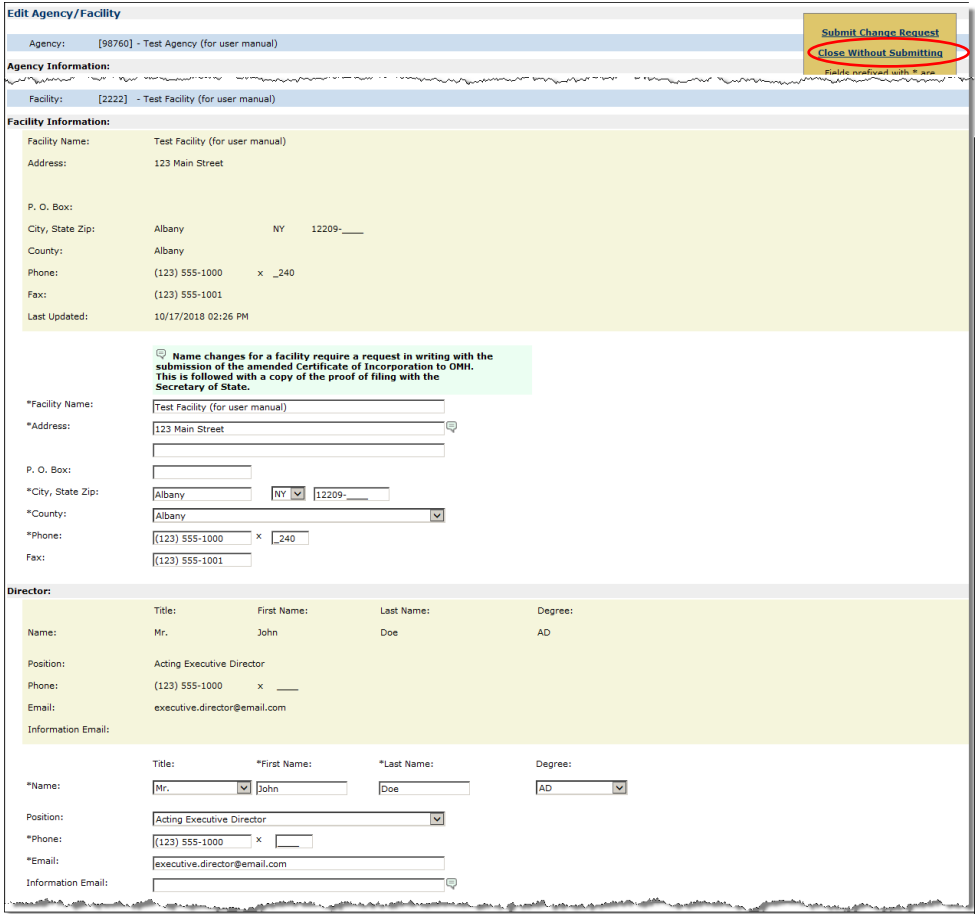


Click pencil to Edit Facility Information

Facility or Director's Information

- ***NOTE:*** In order to edit Facility information or Director's information on the Facility Survey, you must have Provider Admin or County Admin level access to MHPD. If you need to have your access changed, contact your Security Manager.

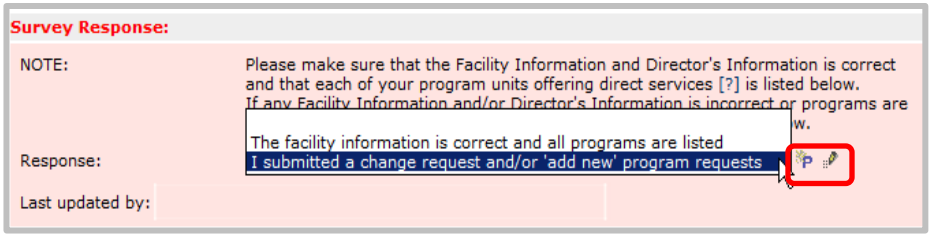
Correcting Facility Information



Make updates to Facility Information using a Change Request.

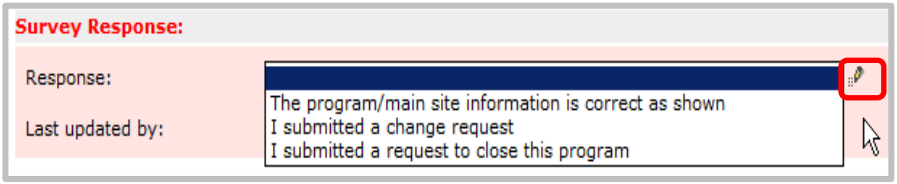
When you are finished, you will be returned to the Facility Survey.

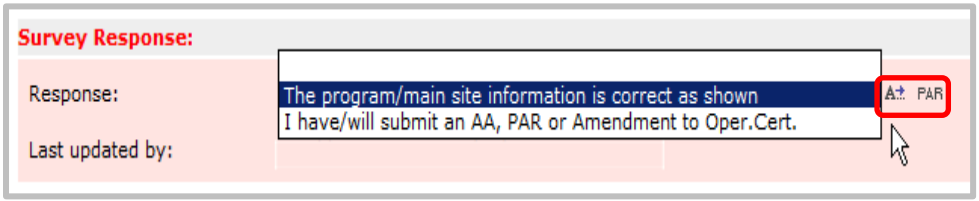
Survey Response Boxes



Facility and Director's Information

Unlicensed Program





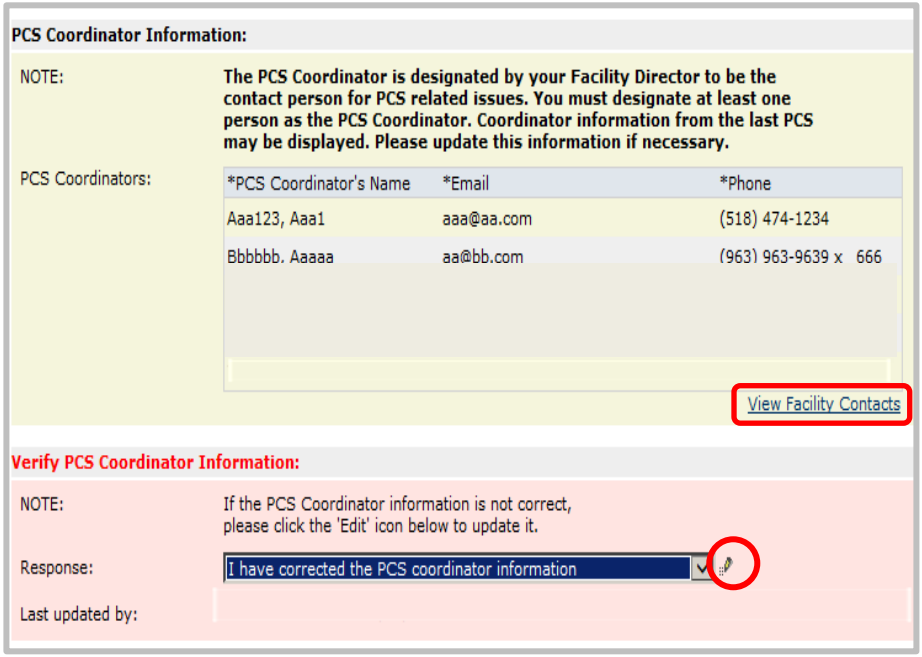
Licensed Site

- Each section of the survey has a response box with similar choices.
- All response boxes must be populated before the survey can be submitted.

PCS Coordinator

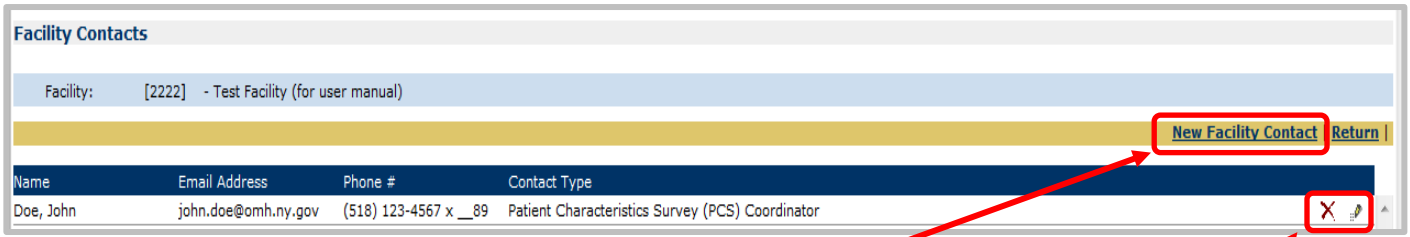
The PCS Coordinator should be someone who knows about your Facility and about completing PCS. This will be the person who is your point of contact with OMH about the PCS.

The PCS Coordinator should plan to attend the PCS training in the Fall.



If the PCS Coordinator listed is incorrect or if there is no PCS Coordinator, click the pencil icon or “View Facility Contacts” link.

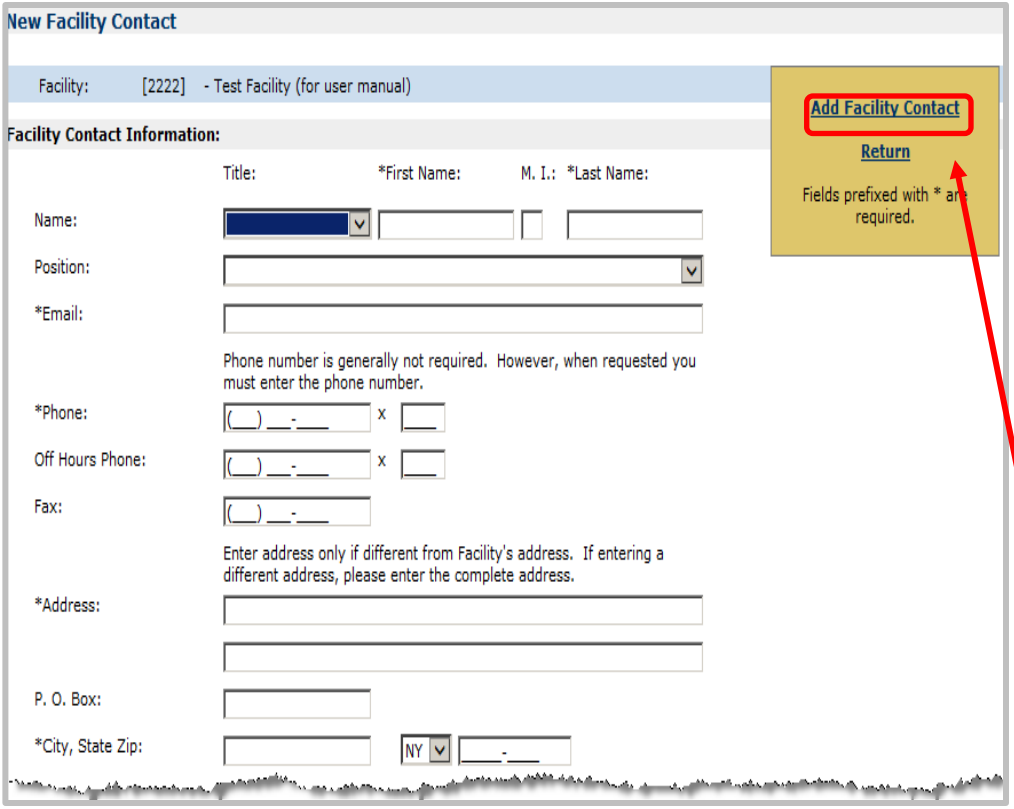
To Update the PCS Coordinator



- Click on the "New Facility Contact" to add a contact

- Click on the "X" icon to delete or the pencil icon to edit this contact.

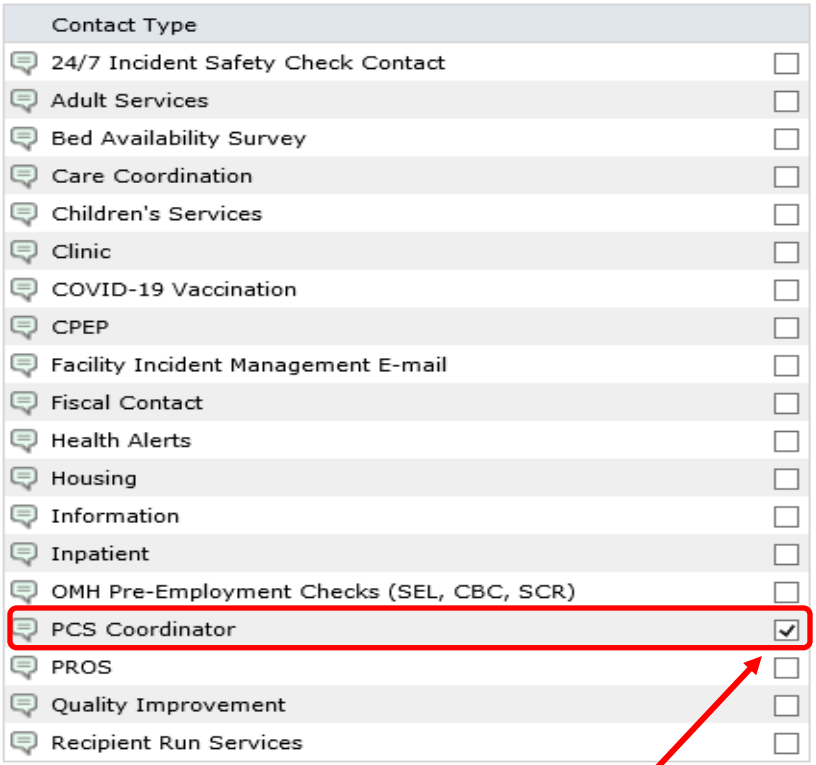
Facility Contact Page – top half



NOTE: Fields preceded by an asterisk (*) must be completed.

NOTE: Click Add Facility Contact when done.

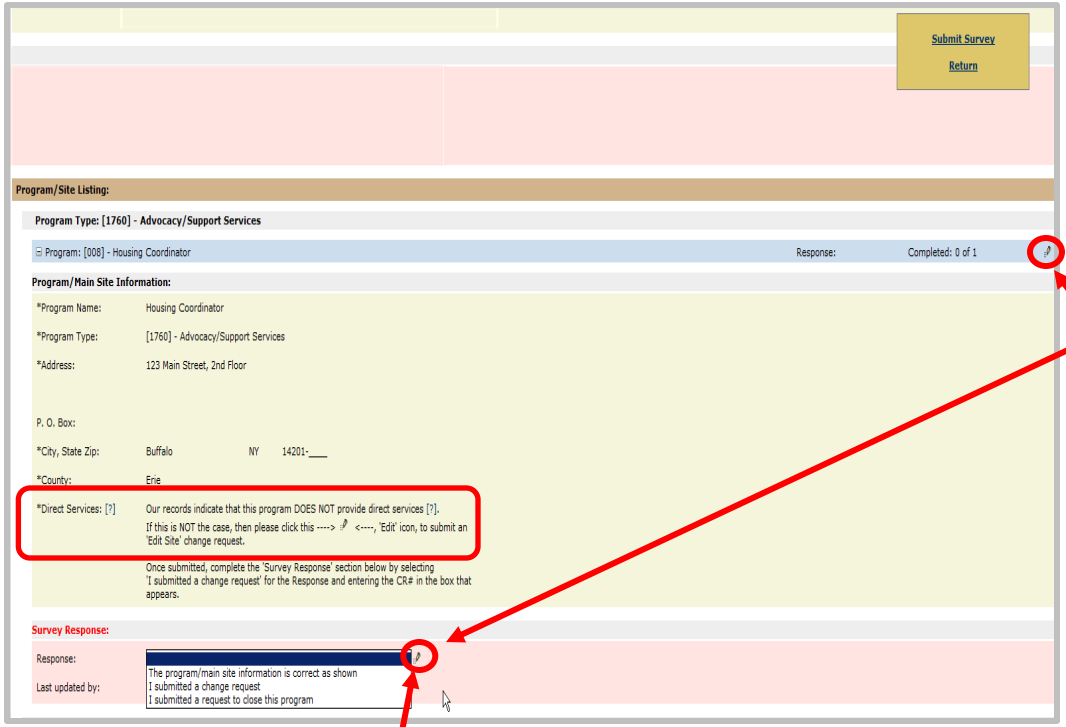
Facility Contact Page – bottom half



NOTE: When updating an existing contact's information, click Update Facility Contact in the gold box to save the information and then click return.

Click the box for the role the facility contact will have. For example, PCS Coordinator.

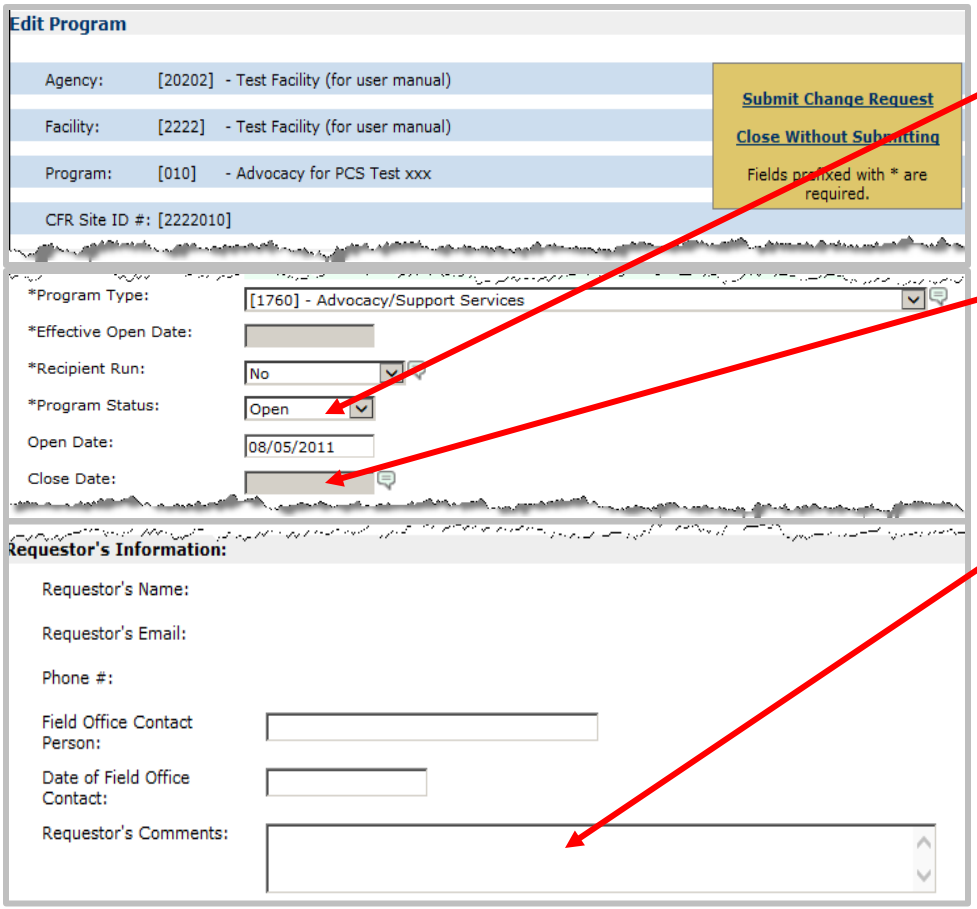
Unlicensed Programs



Click either pencil icon to bring up the Change Request screen to edit this program.

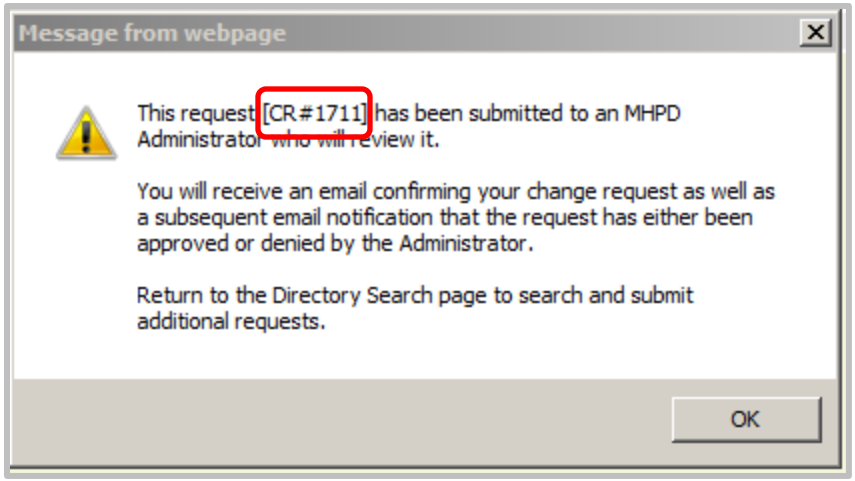
Direct Service “Edit Site” change request

Change Request to Close Program



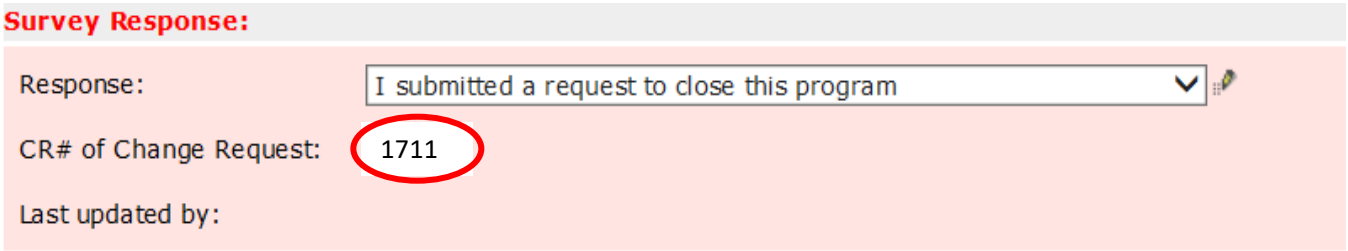
- Click dropdown to Change Program Status to “Closed”
- Enter a close date that reflects the actual date of the program’s closure
- Explain the reason for the closure briefly in requestor’s comments

Change Request Confirmation



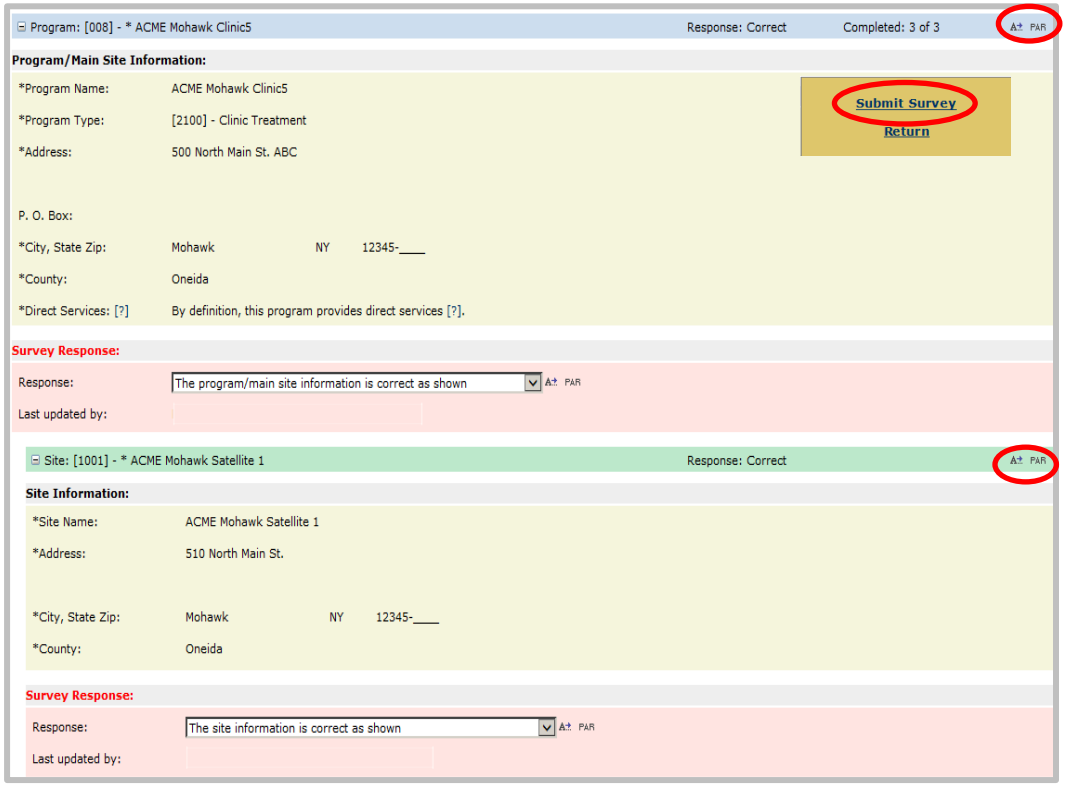
Make a note of the CR number to enter in the Survey Response Box

After Submitting Change Request…



Enter the Change Request number in the box that appears below the response. The application will not accept an incorrect number, so please enter it carefully.

Licensed Programs and Sites

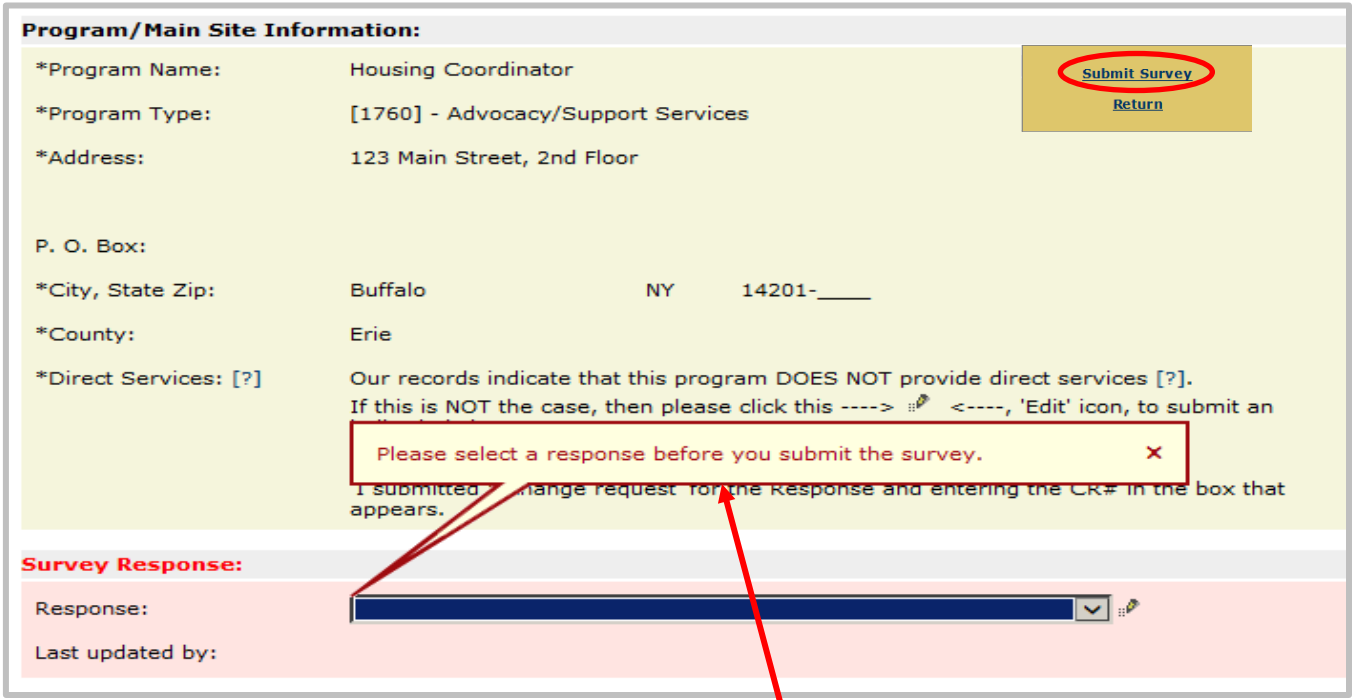


Administrative Actions or EZPARs can be submitted here for the main site…

and here for the satellite site.

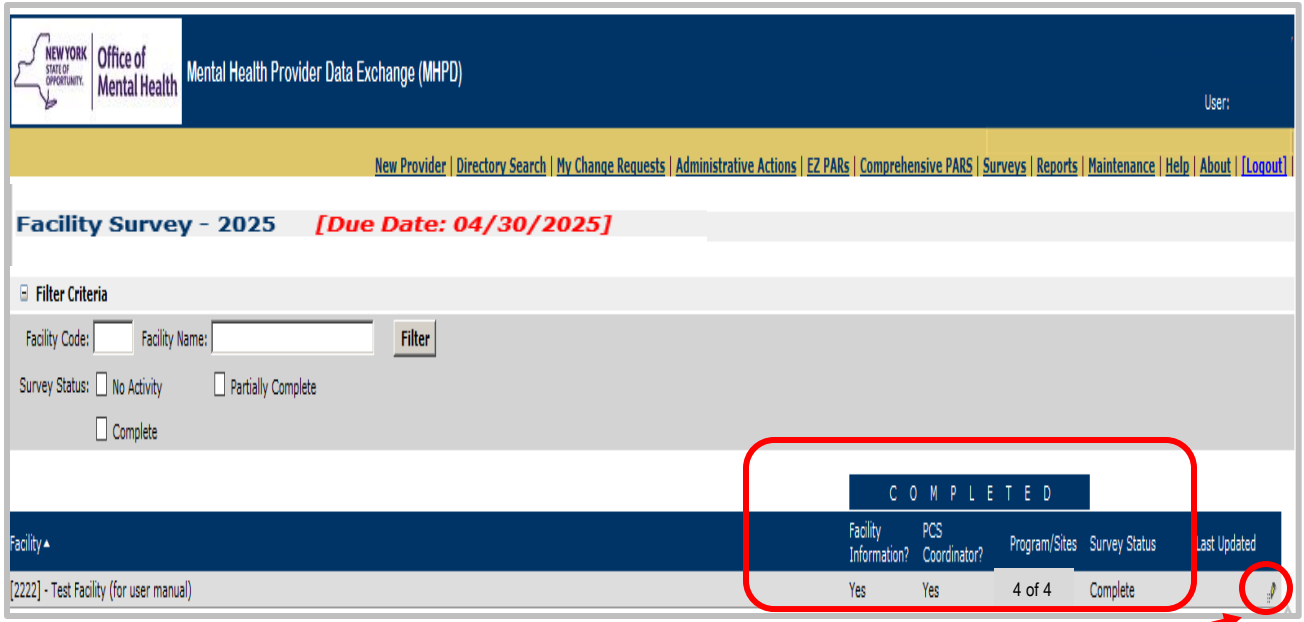
Note that programs have a **blue** banner, while sites are indented and have a **green** banner.

Error Messages



After you click Submit Survey, the application will direct you to fill in any missing answers.

Successfully Finished!



You can make corrections even after submitting the survey by returning to this page and clicking the pencil icon to return to the survey.

FACILITY SURVEY

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

Reference documents:

MHPD Home page with Basic User and Facility Survey Manuals
https://omh.ny.gov/omhweb/mhpd/

Security Management System (SMS) Reference Manual
https://www.omh.ny.gov/omhweb/sms/

PCS Home page (2025 Survey Form & Calendar Available)
https://www.omh.ny.gov/omhweb/pcs/submissions/