

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

F	acility 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 upto-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
 - ∘ <u>Slides</u> ™
 - <u>Recording</u>
- Manuals
- Frequently Asked Questions (FAQs)
- <u>Definition of Terms</u>
- 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...

Verify Contact Information

Contact Information for Provider Administrator

NOTE:

For security reasons, OMH asks that you verify your title, email address and phone number before accessing MHPD. Please check the information provided below and, if correct, click "YES" to continue using MHPD. If any information is not correct, please contact the Security Manager at your facility, who can correct this information for you in the Security Management System. If your email address is missing, you will not be allowed to continue, and MUST contact your Security Manager in order to proceed.

The following are Security Managers at your facility:

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

Contact Information:

User Id:	MHPD_PA		
User Name:	Provider Administrator		
Title:	Provider Administrator		
Email Address:	mhpd_pa@omh.state.ny.ys		
Phone #:	(123) 456-7890 x		

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

Yes

No

Getting to the Facility Survey

Mental Health Provider Data Exchange (MHF	D)		User: Provider Administrator
	Directory Search My Change Re	quests Administrative Actions EZ PARs Comprehensive PAR Surv	veys peports Maintenance Help About [Logout]
Directory Search			
Search Criteria			
Search for: Facilities V that: begin with V the following: test	Search		
Program Type:AnyAny	V		
Program County:Any 💌			
Display: Facilities, Programs and Sites 🔽			
OMH Licensed Programs and Sites are prefixed with *.			
🗉 🖬 Name	City	Program Type	
Facility: [98760/2222] - Test Facility (for user manual)			🌾 🥒 🗚 EZ CRAR 😚
Program: [008] - Housing Coordinator	Buffalo	[1760] - Advocacy/Support Services	e 60°
Site: [1000] - [Main Site] Housing Coordinator	Buffalo		P 60'
Program: [010] - * Recovery PROS	Buffalo	[6340] - Comprehensive PROS with Clinical Treatment	🖋 At EZ CPAR 🔐
Site: [1000] - * [Main Site] Recovery PROS	Buffalo		A.* EZ 60^
Program: [456] - Test - Add a Program	Albany	[5070] - Supported/Single Room Occupancy (SRO)	₽ 6d [*]
Site: [1000] - [Main Site] Test - Add a Program	Albany		P 60'
Program: [001] - Transportation Program	Albany	[2300] - Home and Community Based Services (HCBS) Waiver	P 60^
Site: [1000] - [Main Site] Transportation Program	Albany		<i>6</i> √
Program: [123] - Transportation Test	Albany	[0670] - Transportation	e 60°
Site: [1000] - [Main Site] Transportation Test	Albany		±∕ 60°

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

Surveys Page

Mental Health Provider Data Exchange (MHPD)			Tuesday, Mai User:	rch 18, 2025 : Test
	System Auditing Directory Search My Change Requests Administrative Actions EZ PARs Comprehensive PARS Surveys	Reports Maintenance	Help About	[Logout]
Surveys				
Survey Name	Survey Type	Start Date	Due Date	
Facility Survey - 2025	For Patient Characteristics Survey	04/01/2025	04/30/2025	1

Select the pencil icon to access the Facility Survey

Facility Survey	Facility Survey takes place <mark>April 1st – 30th </mark>
Facility Survey - 2025 [Due Date: 04/30/2025]	
🗄 Filter Criteria	
Facility Code: Facility Name: Filter	
Survey Status: No Activity Partially Complete	
Complete	
	COMPLETED
Facility •	Facility PCS Information? Coordinator? Program/Sites Survey Status Las Updated
[222] - Test Facility (for user manual)	0 of 4 No Activity
Status bar indicat completion of Fac Survey.	ces Click the pencil icon cility to proceed into the survey.

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Programs Required to Report in PCS

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.

Definition of Direct Services

Direct Services are services provided to consumers or collaterals through face to face or telephone contact. Services may be provided individually or in a group setting. Services may be provided by the program itself or may be subcontracted. Programs offering ONLY administration (e.g., accounting, financial services), staff training, public education, discharge planning, coordination, linkage or referral are NOT considered "direct service" providers.

×

Facility Information

Facility Survey - 2025 [Due Date: 04/30/2025] 🄖 🤌 ■ Facility: [2222] - Test Facility (for user manual) Response: Completed: 0 of 0 About the Facility Survey: Submit Survey NOTE: The purpose of the Facility Survey is to give providers the chance to Return 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. V 🏷 🤌 Response:

About the Facility Survey	bout 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.			ct the ugh	Submit Survey Return		
Facility Information:						
*Facility Name:	Test Facil	lity (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	5-1000 Ext				
*Email:	john@em	ail.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:					~	P . K
Last updated by:						
Security Manager's	Inform	nation:				
Security Managers:		Security Manager'	s Name	Email Address		Phone #
		Sample Name1		name1@omh_nv_gov		(xxx) xxx-xxxx
		Sample Name?		name2@aol.com		(222)
		Sample Namez		namez@aoi.com		(^^^)
Directions for Updating Security Manager:		Your Facility Dir the email he or Director no long Security Depart resent.	ector may she has re er has this ment by ca	appoint a new Secur ceived from OMH Sec s email, he or she sho alling 1-800- HELP NY	rity Manager curity. If the ould contact 'S and reque	by forwarding Facility the OMH sting it be
		resent.	inchie by ce		o ana reque	

Facility Information

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

🕑 🖃 Facility: [2222] - Test	Facility (for user manual)	Response:	Completed: 0 of 0
About the Facility Survey	r.		Submit 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.		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 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: Last updated by:	The facility information is correct and all programs are listed I submitted a change request and/or 'add new' program requests		

Click pencil to Edit Facility Information

Facility or Director's Information

 <u>NOTE</u>: 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

Ed	it Agency/Facility	/					
	Agency: [997	601 - Test Agency (for user s	manual)				Submit Change Request
	Agency: [987	ooj - rest Agency (for user r	nanuar)				Close Without Submitting
		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		· · · · · · · · · · · · · · · · · · ·	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	- man and and and and and and and and and a	Fields prefived with * are
	Facility: [222	2] - Test Facility (for user m	nanual)				
Fa	cility Information:						
	Facility Name:	Test Facility (for user	r manual)				
	Address:	123 Main Street					
	P. O. Box:						
	City, State Zip:	Albany	NY 12209	_			
	County:	Albany					
	Phone:	(123) 555-1000	× _240				
	Fax:	(123) 555-1001					
	Last Updated:	10/17/2018 02:26 PM	4				
		Name changes submission of the This is followed w Secretary of State	for a facility require amended Certificate ith a copy of the proo	a request in writing with the of Incorporation to OMH. f of filing with the			
	*Facility Name:	Test Facility (for use	r manual)				
	*Address:	123 Main Street					
	P. O. Box:						
	*City, State Zip:	Albany	NY 🔽 12209-				
	*County:	Albany		~			
	*Phone:	(123) 555-1000	× _240				
	Fax:	(123) 555-1001					
Di	ector						
	ccion.	Title:	First Name:	Last Name:	Degree:		
	Name:	Mr.	John	Doe	AD		
	Position:	Acting Executive Dire	actor				
	Phone:	(123) 555-1000	×				
	Email:	executive.director@e	mail.com				
	Information Email:						
		Title:	*First Name:	*Last Name:	Degree:		
	*Name:	Mr.	John	Doe	AD 🔽	1	
	Position:	Acting Executive Din	ector	V			
	*Phone:	(123) 555-1000	×				
	*Email:	executive.director@e	amail.com				
	Information Email:						
1.000		A		and attraction and and and and and and and a second s		للمستعملين المعلمين والمطفي وم	kina an inadah i

Make updates to Facility Information using a Change Request.

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

## **Survey Response Boxes**



- 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.

#### PCS Coordinator Information: NOTE: The PCS Coordinator is designated by your Facility Director to be the contact person for PCS related issues. You must designate at least one person as the PCS Coordinator. Coordinator information from the last PCS may be displayed. Please update this information if necessary. PCS Coordinators: *PCS Coordinator's Name *Email *Phone Aaa123, Aaa1 aaa@aa.com (518) 474-1234 Bbbbbb, Aaaaa aa@bb.com (963) 963-9639 x 666 View Facility Contacts Verify PCS Coordinator Information: If the PCS Coordinator information is not correct. NOTE: please click the 'Edit' icon below to update it. Response: I have corrected the PCS coordinator information Last updated by:

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

Facility Contac	cts			
Facility:	[2222] - Test Facility (for us	er manual)		
				New Facility Contact Return
Name	Email Address	Phone #	Contact Type	
Doe, John	john.doe@omh.ny.gov	(518) 123-4567 x89	Patient Characteristics Survey (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

New Facility Conta	ct	
Facility: [2: Facility Contact Info	222] - Test Facility (for user manual) rmation:	Add Facility Contact
Name:	Title: *First Name: M. I.: *Last Name:	Fields prefixed with * an required.
*Email:	Phone number is generally not required. However, when requested you must enter the phone number	
*Phone: Off Hours Phone:		
Fax:	( <u>    )     </u>	
*Address:	Enter address only if different from Facility's address. If entering a different address, please enter the complete address.	
P. O. Box:		
*City, State Zip:		
مسجع كالأسرى ومرجعه والمحافظة	، ۵۰ کام مالک می وجد ایک کام کام کام کام کام کام کام کام کام کا	and a strategy of the strategy

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

**NOTE**: Click Add Facility Contact when done.

## Facility Contact Page – bottom half

	Contact Type	
ę	24/7 Incident Safety Check Contact	
Q	Adult Services	
ę	Bed Availability Survey	
Q	Care Coordination	
ę	Children's Services	
ę	Clinic	
ę	COVID-19 Vaccination	
Q	CPEP	
ę	Facility Incident Management E-mail	
ę	Fiscal Contact	
ę	Health Alerts	
ę	Housing	
ę	Information	
ę	Inpatient	
Ę	OMH Pre-Employment Checks (SEL, CBC, SCR)	
P	PCS Coordinator	✓
ę	PROS	
ę	Quality Improvement	
ę	Recipient Run Services	

Update Facility Contact
Delete Facility Contact
New Facility Contact
Return
Fields prefixed with * are
required.

**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**



### 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**

Message	from webpage	×
<u>^</u>	This request [CR#1711] has been submitted to an MHPD Administrator who will review it. You will receive an email confirming your change request as well as a subsequent email notification that the request has either been approved or denied by the Administrator.	
	Return to the Directory Search page to search and submit additional requests.	
	OK	

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**

6	Program: [008] - * ACME	Mohawk Clinic5	Response: Correct	Completed: 3 of 3	Administrative
P	rogram/Main Site Inform	nation:			Auministrative
•	*Program Name:	ACME Mohawk Clinic5		Cubmit Cumun	Actions or
•	*Program Type:	[2100] - Clinic Treatment		Return	
•	*Address:	500 North Main St. ABC			EZPARs can
					be submitted
F	P. O. Box:				be submitted
•	*City, State Zip:	Mohawk NY 12345			here for the
•	*County:	Oneida			
•	*Direct Services: [?]	By definition, this program provides direct services [?].			main site
s	urvey Response:				
F	Response:	The program/main site information is correct as shown			
ι	ast updated by:				
1					and here for
	G Site: [1001] - * ACME	Monawk Satellite 1	Response: Correct	AZ PAK	
	Site Information:				the satellite
	*Site Name:	ACME Mohawk Satellite 1			cito
	*Address:	510 North Main St.			Sile.
	*City, State Zip:	Mohawk NY 12345			
	*County:	Oneida			
	Survey Response:				
	Response:	The site information is correct as shown			
	Last updated by:				

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

### **Error Messages**

Program/Main Site Information:					
*Program Name:	Housing Coordinator				
*Program Type:	[1760] - Advocacy/Support Services				
*Address:	123 Main Street, 2nd Floor				
P. O. Box:					
*City, State Zip:	Buffalo NY 14201				
*County:	Erie				
*Direct Services: [?]	Our records indicate that this program DOES NOT provide direct services [?]. If this is NOT the case, then please click this> # <, 'Edit' icon, to submit an Please select a response before you submit the survey. × I submitted mange request for the Response and entering the CR# in the box that appears.				
Survey Response:					
Response:					
Last updated by:					

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

### **Successfully Finished!**

Office of Mental Health Provider Data Exchange (MHPD)					
		User:			
New Provider   Directory Search   My Change Requests   Administrative	e Actions   EZ PARs   Comprehensive PARS   Surveys   Reports   Maintenance   Help	About   [Logout]			
Facility Survey - 2025 [Due Date: 04/30/2025]					
G Filter Criteria					
Facility Code: Facility Name: Filter					
Survey Status: 🗌 No Activity 🔹 Partially Complete					
	COMPLETED				
Fadilty •	Facility PCS Information? Coordinator? Program/Sites Survey Status	Last Updated			
[2222] - Test Facility (for user manual)	Yes Yes 4 of 4 Complete				
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 <u>mhpd@omh.ny.gov</u>

### Reference documents:

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

Security Management System (SMS) Reference Manual <a href="https://www.omh.ny.gov/omhweb/sms/">https://www.omh.ny.gov/omhweb/sms/</a>

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