NEW YORK STATE | Office of Mental Health

Frequently Asked Questions

Getting Access to MHPD

- Why do I need to use MHPD?
- Who should obtain access to MHPD?
- Can I appoint myself as Security Manager?
- What do I do to receive my User ID?
- How can I get my password?
- Can I replace my two User IDs with one?
- How can we deactivate a user's access?
- How do I get past the Verify Contact Information page?

Mental Health Provider Data Exchange (MHPD)

- How can we receive notifications of all Change Requests?
- How do I obtain the CFR Program/Site Identification Number?
- How do I get a temporary site ID for a new program so I can submit my Consolidated Business Report (CBR)?
- How do I transfer programs between providers?
- How are new providers established in the OMH Master Provider Directory?
- Can I submit changes for more than one facility?
- Enter our non-OMH funded programs into MHPD?
- What is the process for Facility name changes?
- How can I get a temporary site ID for CBR reporting?
- What do we do about open CAIRS cases?
- How do I add my 24/7 contact information?
- MHPD User Roles - Provider Admin vs. Provider User?

Getting Access to MHPD

- **Why do I need to use MHPD?**

  - **Question:** Why do I need to use MHPD?

  - **Answer:** Local mental health authorities, all licensed programs, and programs funded directly or indirectly by OMH are required to use MHPD. MHPD is fully integrated into the financial, survey, and public information activities of OMH. This integration ensures consistent and accurate maintenance of public mental health program information. The information maintained using MHPD feeds the "Find a Mental Health Program" report on the "Mental Health Resources" section of the OMH public web site. It also provides a master program directory for checking Consolidated Fiscal Reports when they are submitted.

- **Who should obtain access to MHPD?**

  - **Question:** We have several departments in our facility. Which department is the best to maintain the information in the MHPD application?

  - **Answer:** This depends on your organization. Because Consolidated Fiscal Reports will be checked to make sure the program information agrees with the Mental Health Provider Directory (MHPD), organizations may select someone from the financial side of the organization. On the other hand, because the program information component of the Patient Characteristics Survey (PCS) is validated in MHPD, organizations may select the Survey Coordinator from PCS. Your organization is not limited in the number of persons who can use MHPD, so you may want persons from both financial and program sides of the organization.

- **Can I appoint myself as Security Manager?**

  - **Question:** I am the Executive Director of my facility. Can I also be Security Manager?

  - **Answer:** Certainly. At small facilities, we often see Executive Directors performing many functions. You may also find yourself to be the Provider Admin for MHPD and the PCS Supervisor. It is entirely up to you and the needs of your facility.

- **What do I do to receive my User ID?**

    - o **Question:** When my Security Manager entered my information in the Security Management System (SMS), they entered the wrong email address. I never received the replies with my MHPD User ID and password. How do I get them now?

    - o **Answer:** If you have misplaced or forgotten your User ID and/or password, contact your Security Manager. He or she has copies of those emails. Also, please make sure your Security Manager corrects your email address in the Security Management System (SMS) as soon as possible.

- **How can I get my password?**

    - o **Question:** I received an email with my User ID, but I did not receive a separate email with my password. Could it be resent so I can log on?

    - o **Answer:** Please check your email again in about 30 minutes from the time you received your User ID. Sometimes there is a time delay for the second email. If you don't receive it, please contact your Security Manager as they should have also received a copy. If the Security Manager does not have your password email, he or she can reset your password.

    - o **Question:** Should users no longer request a password reset from the Help Desk?

    - o **Answer:** Correct. Users should request a password reset from their Security Manager.

        NOTE: Once you receive an email with your new password, please wait one hour before accessing MHPD so that the databases can update.

    - o **Question:** If the Security Manager resets a password, does that change the password for Web Salute and Clear Trust?

    - o **Answer:** Yes, both Web Salute and Clear Trust will use the newly reset password. Web Salute offers an option to the User to change their password. It is recommended that the User does not change their password, as it cannot be changed in Clear Trust, and the User will be left with two different passwords.

- **Can I replace my two User IDs with one?**

  - **Question:** When my Security Manager registered me, they forgot to enter my existing Web Salute User ID that I use for NIMRS or CAIRS. My registration was approved, so I now have two User IDs. How do I change my access, so I only have to use my original User ID and not remember both?

  - **Answer:** Please contact your security manager to consolidate your User IDs. The Security Manager will update accesses under one User ID and deactivate the other one.

- **How can we deactivate a user's access?**

  - **Question:** Can we deactivate a user's access to MHPD, for example, but not deactivate their access to another application, like CAIRS?

  - **Answer:** No, you cannot deactivate a user's access for one application and not another. When a Security Manager clicks the "Deactivate" button, the User's access to all OMH databases is removed. In SMS, the Security Manager can uncheck the MHPD role previously assigned to that person. Once the Security Manager has done that, they need to be sure to click the "Update" button to save any edits made.

- **How do I get past the Verify Contact Information page?**

  - **Question**: I click "Yes" on the Verify Contact Information page to get into MHPD and nothing happens. I can't get past it to get into MHPD.

  - **Answer:** Please follow these instructions:

==MHPD works in Microsoft Edge only.==

Since Internet Explorer became obsolete in June 2022, users need to follow the below instructions for running MHPD in Microsoft Edge. These are instructions for an individual user to make settings in the Edge browser on their own PC. There is also a set of instructions showing your IT Department how to make settings on the Enterprise level. It is recommended that you have your IT Department use **THOSE** instructions, as this would fix the issue for everyone there. Often, the instructions shown here will not work for individual users because settings are controlled at the Enterprise level by your IT Department. The IT Department version of the instructions were distributed to the appropriate people at your agency in June. Check with your IT Department to make sure that they have received the instructions.

If the first fix doesn't work, try this turning off the Pop-Up Blockers as MHPD requires that the pop-up blockers be turned off.

- Click the "3 dots" icon in the upper right of the Edge browser window

- Choose "Settings"

- Type "pop-up" (without quotes) into the search text field

- Scroll down to "Pop-Ups and Redirects"

- Open up that section using the arrow on the far right

- Click the "Add" button

- Type in [*.]omh.ny.gov] as shown below and click "Add"
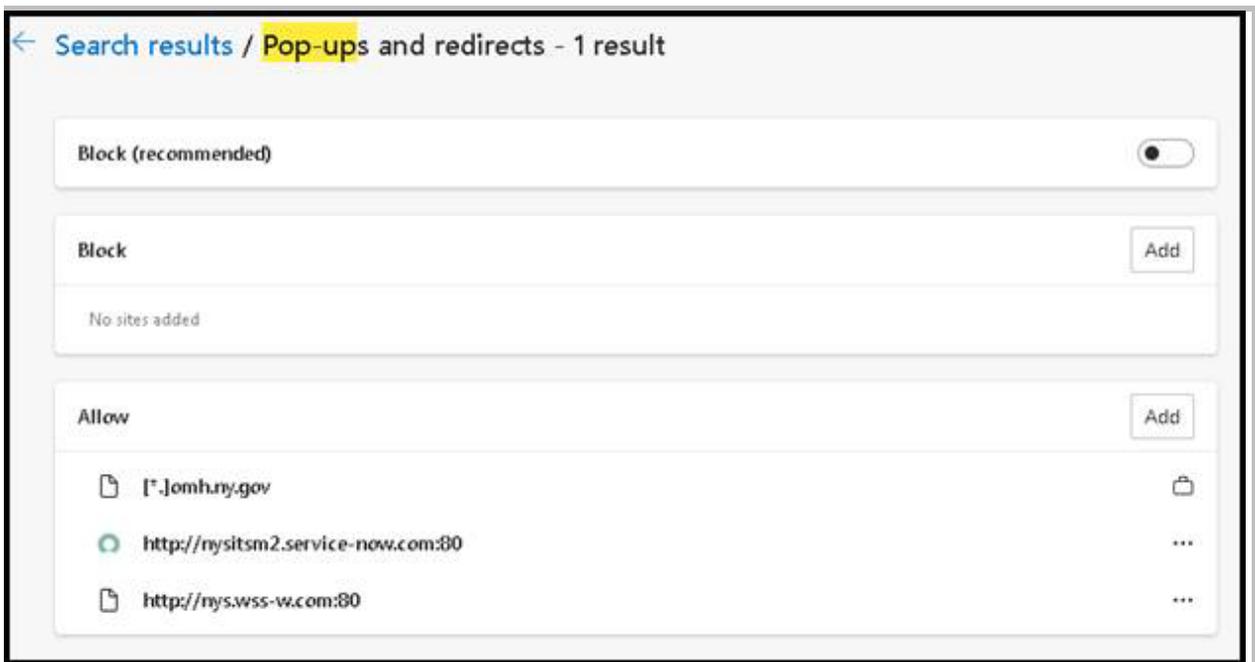
Mental Health Provider Data Exchange (MHPD)

- **How can we receive notifications of all Change Requests?**

  - **Question:** How do I receive copies of all Change Requests that are submitted or acted on?

  - **Answer:** Email notifications are controlled by the staff person in the Provider, County, or Field Office Administrator role. The Administrator selects the "Maintenance" tab at the top of the screen.
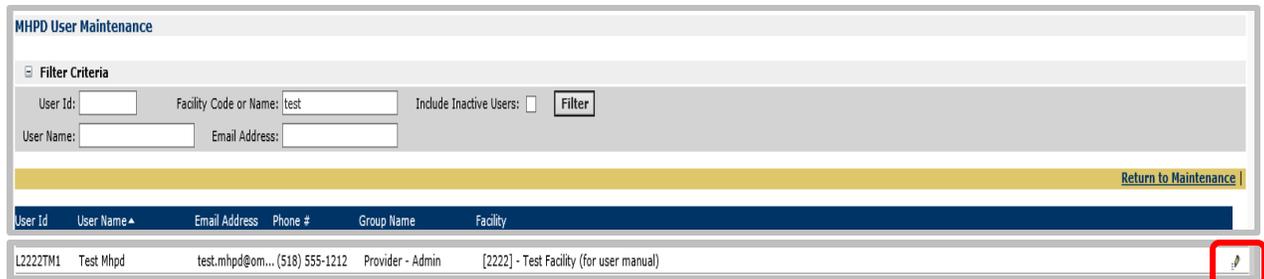
System Auditing | Directory Search | My Change Requests | Administrative Actions | EZ PARs | Comprehensive PARS | Surveys | Reports | Maintenance | Help | About | [Logout] |

Next the User clicks the "Click Here" link under the "MHPD User Maintenance" to see the User list.

Maintenance

MHPD User Maintenance:

MHPD User Maintenance:

This maintenance option allows you to view and edit MHPD Users.   Click Here

The Administrator selects the pencil icon to edit features for that user.

MHPD User Maintenance

Filter Criteria

User Id: [   ]   Facility Code or Name: [test]   Include Inactive Users: ☐   [Filter]
User Name: [   ]   Email Address: [   ]

Return to Maintenance |

User Id	User Name▲	Email Address	Phone #	Group Name	Facility	
L2222TM1	Test Mhpd	test.mhpd@om...	(518) 555-1212	Provider - Admin	[2222] - Test Facility (for user manual)	✏

The Administrator scrolls down to the Change Requests (CR) section and clicks the "Email Contact" box.

After the Administrator clicks "Update" in the gold box in the upper right-hand corner, the User will begin to receive email notifications.

- **How do I obtain the CFR Program/Site Identification Number?**

  o **Question:** I received a Consolidated Fiscal Reporting (CFR) audit letter informing me that I need to obtain a permanent CFR program/site identification number for reporting program expenditures. How do I receive it?

  o **Answer:** In MHPD, view the program record. The CFR Site ID is shown near the top of the screen. The ID is assigned to your program after you add it to MHPD.

The most efficient way to correct your Agency or Facility's program information (obtain a permanent CFR program/site identification number, etc.) for non-licensed programs is to submit a Change Request. A Change Request updates current information, opens new OMH-funded programs, and closes programs using the Mental Health Provider Data Exchange (MHPD).

Any corrections made through MHPD will be made in the agency's master directory and will be reflected in the other data systems such as CONCERTS. You can submit program edits from the MHPD Home Page. Some program information can be edited for licensed programs using MHPD, but MHPD does not replace the Prior Approval Review (PAR) process for licensed programs. Contact your Field Office for further assistance.

- **How do I get a temporary site identification number (site ID) for a new program so I can submit my Consolidated Budget Report (CBR)?**

    o **Question:** How do I get a temporary site ID for a new program so I can submit my CBR?

    o **Answer:** For OMH licensed programs, the site code is the operating certificate number. For OMH non-licensed programs, the site code is the Facility and Unit code. In a limited number of instances, a Provider Agency may need to use a temporary site ID on the OMH Budget. A temporary site ID is a seven-digit number created by the Provider Agency. Please see the CFR Manual (https://omh.ny.gov/omhweb/cbr/) for directions on entering a dummy code for the site code. Any CFR questions may be directed to the CFR Unit at CFR@omh.ny.gov.

- **How do I transfer programs between providers?**

    o **Question:** My agency/facility has merged with another. How do I transfer the programs from the previous, closed facility to the current facility?

    o **Answer:** A change request needs to be submitted to close each non-licensed program under the previous facility. A change request also needs to be submitted to open the programs under the current facility. There are several reasons for following this procedure:

        a. It provides program records with operating dates under both the old and new facility. This enables historical analysis and rate setting.
        b. Notifications of closure and opening would be sent to County and Field Office.
        c. The current facility would review and enter current address, contact, and

        Licensed programs would follow the PAR process. Information on EZ PARS can be found at https://omh.ny.gov/omhweb/mhpd/manuals/ez-par.pdf. Information on Administrative Actions can be found at https://omh.ny.gov/omhweb/mhpd/manuals/administrative-a ctions.pdf.

- **How are new providers established in the OMH Master Provider Directory?**

  - **Question:** My agency is not listed in the OMH Master Provider Directory. How do I get it added?

  - **Answer:** When a new provider needs to be established in the OMH Master Provider Directory, the requestor contacts their OMH Field Office.

- **Can I submit changes for more than one facility?**

  - **Question:** I am responsible for program units listed under two facility codes. Can I get access to both facilities with one ID?

  - **Answer:** No, you will need to contact the security manager at each facility to requests access. The Security Manager at your facility can give you access. You will need to contact the Security Manager of the second facility to be added as a new user to their facility and be granted access. You will have one unique User ID/password or token for each facility.

- **Enter non-OMH funded programs into MHPD?**

  - **Question:** Should I enter our non-OMH funded programs into MHPD?

  - **Answer:** No. Programs that should be entered in MHPD are funded by NYS OMH direct contract or local assistance funds through Departments of Mental Health be entered into MHPD. When you submit your Consolidated Fiscal Report (CFR), OMH will compare the OMH Master Provider Directory with the CFR to make sure the list of programs and site agree. In preparation for reporting client data in the Patient Characteristics Survey, all programs need to be in the OMH Master Provider Directory.

- **What is the process for Facility name changes?**

  - **Question:** What changes can I submit to the facility name using MHPD?

  - **Answer**:   Depending on the nature of the facility name change, there are several different possible types of MHPD changes:

    - If a facility is officially changing its name, then a facility name change has to be made with the Department of State (DOS) (https://www.dos.ny.gov/corps/buscorp.html). When that is complete, the provider should notify the appropriate OMH Field Office and provide the DOS paperwork to begin changing the information in OMH systems. The Field Office will work with the Bureau of Inspection and Certification (BIC) to make the appropriate changes. Additionally, a licensed provider must complete an Administrative Action (AA) through the Mental Health Provider Data Exchange (MHPD) System. An unlicensed provider may submit a Change Request.

- If a facility is amending its name to a Doing-Business-As (DBA), then the facility should forward the relevant organizational paperwork and enter an MHPD change request.

- Before beginning the facility name change process, please contact your local Field Office, and describe the nature of your facility's name change in order to determine the appropriate course of action.

- **How can I get a temporary site ID for CBR reporting?**

  o **Question:** How do I get a temporary site ID for a new program so I can submit my CBR?

  o **Answer:** You can create a new program in the CFRs software by using a dummy code for the site code. This will allow you to submit your CBR to get the contract approved. Once approved, please submit requests in MHPD to obtain permanent CFR site IDs.

- **What do we do about open CAIRS cases?**

  o **Question:** We have two programs that are merging into one, but we can't close the program because they have open CAIRS cases. What do I do?

  o **Answer:** You choose among three options:

    1. Close all existing (open; not yet discharged) cases in the ICM units and start new CAIRS cases in the new BCM unit. The "Referral Out" feature can be used to transfer the most recent information to the new unit to minimize the data entry of opening cases in the new unit.

    2. Request that all your existing cases in the ICM units be moved to the new BCM unit and all closed cases remain in the existing ICM units.

    3. Request that all existing CAIRS cases in the ICM units be moved to the new BCM unit as though the previous ICM units never existed. Depending upon why you are making this change in units, the solution can be any one of the above. You choose among them based on how you want your information recorded. For assistance with a CAIRS issue, please contact the CAIRS Helpdesk (800-435-7697, select option 2).

- **How do I add my 24/7 contact information?**

  - **Question:** I want to add my 24/7 contact information to the Facility Contacts in MHPD. How do I do that?

  - **Answer:** For information on how to add or edit a facility contact, refer to the MHPD Basic User Manual, under "Facility Contacts." Please note that for a User to edit "Facility Contact" information, a User must have MHPD Provider Admin access. For specific questions on 24/7 Incident Safety Check Contact, please contact the Strategic Risk Reduction Unit at (518) 474-3619.

- **MHPD User Roles – Provider Admin vs. Provider User?**

  - **Question:** I need to add a program. Which MHPD User role do I need?

  - **Answer:** In order to submit a Change Request for an **unlicensed** program or an EZPAR/Administrative Action for a **licensed** program, an MHPD user can have either Provider Admin or Provider User access to MHPD.

  - **Question:** What type of MHPD access do I need in order to be able to edit facility contacts?

  - **Answer:** In order to edit facility contacts, you need Provider Admin access. Click on the eyeglass icon to the right of the facility name and scroll down until you see the "Edit Facility Contacts" link.

Comments or questions about the information on this page can be emailed to the **Surveillance and Surveys Unit** at mhpd@omh.ny.gov.