



**Office of
Mental Health**

Mental Health Provider Data Exchange Basic User Manual

June 2016

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[Return to MHPD Manuals](#)

Introduction

Application Overview

Mental Health Provider Data Exchange (MHPD) is a web based application for use by Providers, County Mental Health departments and OMH Field Office and Central Office staff for viewing and requesting updates to information stored in the Office of Mental Health Provider Database (CONCERTS). This document will serve as a guide for providers, county local government unit (LGU) and OMH field office users of the MHPD application. The guide identifies and describes web page content and assists in page navigation through the application.

The MHPD application provides for:

- Viewing and updating descriptive, contact and other program and administrative information for Facilities, Programs and Sites
- Requesting minor changes to licensed programs via Administrative Actions
- Creating new unlicensed mental health programs
- Closing unlicensed mental health programs
- Completing surveys that collect program-level information

The MHPD application is available through the internet via Salute which provides secured access to OMH applications. The log in process is explained in detail in the section “Logging into MHPD.” If information is needed, regarding usernames, passwords, or to report a problem with MHPD, **contact the OMH Help Center.**

Help Center

You can contact the OMH Help Center, Sunday thru Saturday, 7 a.m. to 8 p.m. at (518) 474-5554 or (800) 435-7697 or send an email message to: [OMH Help Center](#) for information regarding usernames, passwords, entering pin #'s or to report a problem with the MHPD application.

♪ **Note:** BEFORE contacting the OMH Help Center, please refer to the instructions provided in this guide.

Field Office Contacts

A [List of Office of Mental Health field offices](#) can be found on the OMH website.

System Requirements

MHPD can only be accessed using Internet Explorer.

♪ **Note:** Pop-Up Blockers must be turned off or uninstalled for the MHPD application to function properly. Examples of pop-up blockers may be found in the Yahoo Toolbar, the Google Toolbar and the MSN Toolbar. For help turning off pop-up blockers for Internet Explorer, refer to the Appendix of this manual.

Gaining Access to MHPD and Updating Your User Info

The external MHPD Self Registration application has been removed, in favor of having the Security Manager at your facility assigning access to MHPD. In order to access MHPD, a user must be assigned to one of the security groups listed below, and must have a User ID and password. Both of these requirements can be met by having the Security Manager at your facility enter your information into the Security Management System. When this change took effect on January 19, 2011, existing MHPD Users were migrated into one of the new Security Group roles. If you find that you are in the wrong group and need different access, please speak to your Security Manager.

Additionally, users will no longer be able to update their own Name, Title, Email, and Phone Number in MHPD. This function will also be completed by the Security Manager at your facility. If you need assistance locating your Security Manager, check with your Facility Director, or call the OMH Help Desk at 1-800-HELP-NYS.

Security Groups

Provider User: A User at an individual Facility who can access all the information currently available for that Facility in MHPD. A User with Provider access can submit Change Requests, Administrative Actions and EZPARs to add, update or close programs. Under the Reports tab, a Provider User can view the following MHPD reports: CFR (Consolidated Fiscal Report) Report.

Provider Admin: A User at an individual Facility who has all the Provider User functionality and can edit the facility information as well. Additionally, a User with a Provider Admin role can edit the facility maintenance page and assign persons to receive facility notifications sent out by OMH via email. Under the Reports tab, a Provider Admin can view the following MHPD Reports: CFR (Consolidated Fiscal Report) Report.

County User: A County or New York City Mental Health Department User can search, view and request updates to Facilities, Programs and Sites located in the county. A County User can view change requests and can request the opening or closing of existing unlicensed programs, but cannot submit Administrative Actions and EZ PARs. Under the Reports tab, a County User can view the following MHPD reports: Recent MHPD User Listing; Facility Contact Information; Program Contact Information; and CFR Report.

County Admin: A User at a local government unit who has the same access as a County User, and can edit the facility maintenance page for the County Department of Mental Health. Under the MHPD Reports tab, a County Admin can view the following reports: Recent MHPD User Listing; Facility Contact Information; Program Contact Information; and CFR Report.

Central Office User: Can search and view Facilities, Programs and Sites throughout New York State and, if permitted, can request the creation of new unlicensed mental health programs. Has the option to view all requests. Under the Reports tab, a Central Office User can view all of the MHPD reports; all of the MHPD PAR Reports; and all of the Case Management Annual Survey Reports.

Central Office Admin: Can search and view Facilities, Programs and Sites statewide. Depending on level of access, an Administrator can view all Facility and/or Program Change Requests statewide, however, the primary role is to review update requests that are assigned to the Administrator and either approve or deny those requests. Under the Reports tab, a Central

Office Admin can view all of the MHPD reports; all of the MHPD PAR Reports; and all of the Case Management Annual Survey Reports.

Field Office User: The primary function is to review user requests for changes to Facilities, Programs and Sites located in their region and enter information in the Field Office comments box to assist the Program Administrator in the approval process. Additionally, can search, view and request updates for Facilities, Programs and Sites. Has the option to view all requests statewide. May view and support Administrative Actions. Under the Reports tab, a Field Office User can view the following MHPD reports: Recent MHPD User Listing; Program Administrator Listing; Facility Contact Information; Program Contact Information; Recipient Run Requests; and CFR Report. A Field Office User may also view the MHPD PAR Reports.

Field Office Admin: A User at the Field Office who has all the Field Office User functionality and can edit the Field Office maintenance page to indicate whether all change requests are shown, by default. Under the Reports tab, a Field Office Admin can view the following MHPD reports: Recent MHPD User Listing; Program Administrator Listing; Facility Contact Information; Program Contact Information; Recipient Run Requests; and CFR Report. A Field Office Admin may also view the MHPD PAR Reports.

Logging into MHPD

MHPD is a web based application that is accessed using the web address - <http://omh.ny.gov/>. Click on the **Behavioral Health Providers** tab.



Scroll down and click on the **Mental Health Provider Data Exchange (MHPD)** link.

Behavioral Health Providers

Behavioral Health 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 2015 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 2015 survey timeframe and requirements for preparing for and obtaining access to the Web-based PCS application.

[Patient Characteristics Survey \(PCS\) Portal](#)

The PCS provides a comprehensive one-week "snapshot" of the population served by New York State's public mental health system. View demographic, clinical, and service-related information for each person who receives a mental health service during the specified one-week period using the dynamic Portal Summary or Planning Reports.

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.

This will bring you to the MHPD Homepage, click on **MHPD (Restricted – User ID and Password Required)** link to sign in with your User ID and password.

Mental Health Provider Data Exchange (MHPD) Home Page



Description

The Mental Health Provider Data exchange (MHPD) is a web-based application designed to support an accurate and timely master provider directory of 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 the Office of Mental Health (OMH). This master provider directory can be used by local mental health authorities to help evaluate access to services across their counties and regions.

Review Process

Program administrators at OMH central office, OMH field offices and local mental health authorities are the key parties who participate in the MHPD approval process. Each request prompts the MHPD application to send e-mails to the requestor and other key parties notifying them of the request and need for review. The key parties are able to correspond with each other within the MHPD application.

When an administrator approves or denies a request, MHPD sends a notice of the action and the administrator's comments to each of the parties. If a Change Request, Administrative Action (AA), or Easy Prior Approval Review Application (EZ PAR) is denied, the facility may resubmit it with additional information for further review. Using MHPD, the facilities can assign a Primary Facility Contact to receive approval and denial notifications.

[Getting Access to MHPD via the Security Management System \(SMS\)](#)

- **MHPD (Restricted - User ID and Password Required)**
- [Manuals](#)
- [Facility Survey](#)
- [Frequently Asked Questions \(FAQs\)](#)
- [Definition of Terms](#)
- [Find a Mental Health Program In Your Community](#)

Contact us:

For help with accessing the MHPD application, please contact the OMH Helpdesk at 1-800-HELP-NYS (1-800-435-7697). Please [send feedback and recommendations](#) on the MHPD application and Training enrollment.

Comments or questions about the information on this page can be directed to the [Bureau of Data Infrastructure](#).

MHPD can only be accessed using Internet Explorer.

Click on “**Agree**” in the Statement of Access and Confidentiality.

Private system for authorized use only

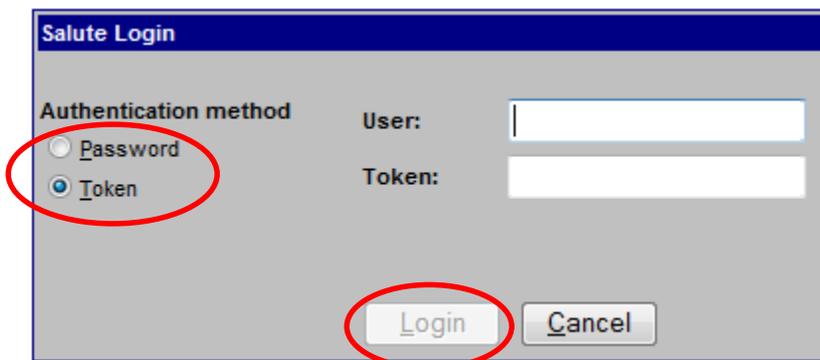
Statement of Access and Confidentiality

WARNING: This computer system is solely for the use of authorized users for official purposes. Users of this system have no expectation of privacy in its use. To ensure that the system is functioning properly, individuals using this computer system are subject to having all of their activities monitored and recorded by system personnel. Use of this system evidences an express consent to such monitoring.

Unauthorized or improper use of this system may result in administrative disciplinary action and civil and criminal penalties. By continuing to use this system you indicate your awareness of, and consent to, these terms and conditions of use. If you do not agree to the conditions stated in this warning, LOG OFF IMMEDIATELY.



Under Authentication Method in the Salute Login, make sure to click in the proper method – **password or token** – **prior** to entering your information. Type in your User ID and your password or token whichever Authentication Method you have chosen. Note: A password or token can be used to access MHPD.



Logging into MHPD Using a Password

Select the **Password Option** and type in your **User ID** and then press the **Tab** key on the keyboard. Enter your **Password** and click on the **Login** button or press **Enter** on the keyboard. Please note that passwords are case sensitive. “**Authenticating...Please wait**” appears. Upon successful validation, the MHPD application bar is displayed.

Logging in for the First Time Using a Token

Select the **Token Option** and type in your **User ID** in the box marked **User**. Type the 6-digit number located on the token in the box marked **Token**, then click on the **Login** button.

You will be prompted to enter a 4-digit **PIN**. This must be a 4-digit number. Do not use letters. Type a new **PIN** for your **Token login** at the **Please enter new PIN** prompt. This number will be required each time you login to the MHPD application.

Click **OK**. The **Salute Login** dialog box appears. You will need to sign in again with the **User** name, **PIN** and a **Token** identification.

♪ **Note:** Sometimes trying to login in too quickly after setting your **PIN** results in an error message. It is best to wait a few minutes for the token number to change and the main server to record your new **PIN**. If a problem logging in continues, contact the OMH Helpdesk for further assistance.

Logging in After the First Time Using a Token

Select **Token** as the **Authentication method**. Position your cursor in the **User** prompt and type the **User ID** assigned to you by OMH.

Position your cursor in the **Token** prompt, type in your **PIN** (4-digits established during the first time login). Directly after the **PIN** number, type the **Token** 6-digit number from the **Secure ID** token device. The **Token** prompt will display asterisks (*) for both the combined **PIN** and **Token ID**. Then Click on “Login”.

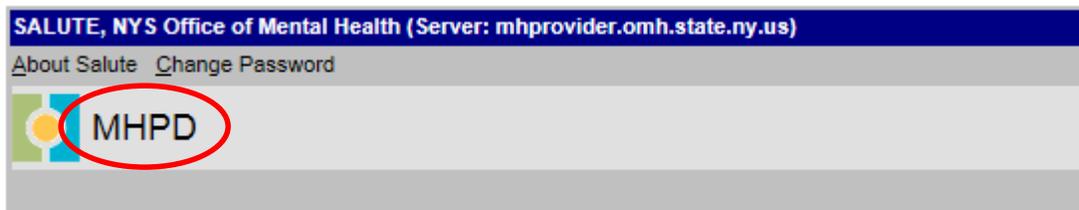
♪ **Note:** The 6-digit number in the **Secure ID** token will change every minute. A time bar on the left side of the token displays indicating the time before the next number will appear. If you have not typed the token number and clicked **Login** before the number changes, you will be out of synch with the server and will receive an error message.

Logging in with a Soft Token

Type your 4 digit PIN in the **Enter PIN:** field and Click on the adjacent arrow to submit.

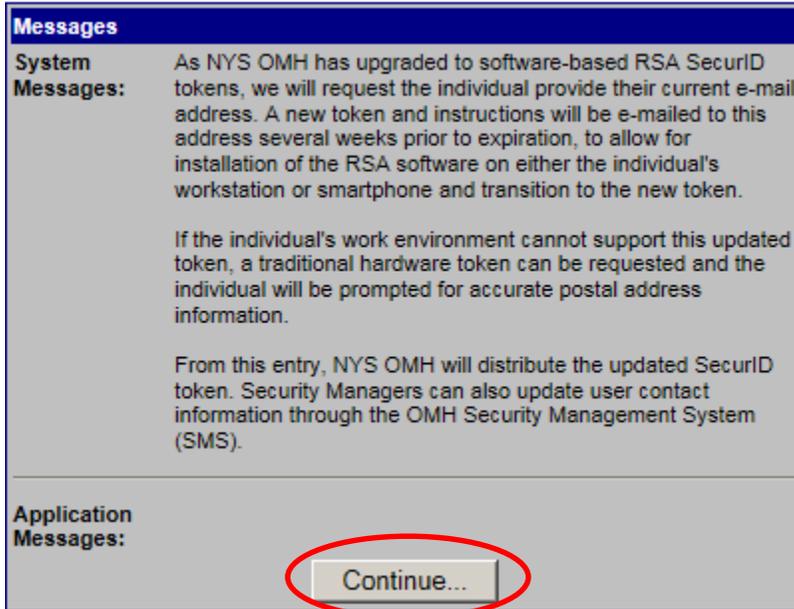


If you are authorized to access other OMH applications, there will be more than one bar displayed. Click on the **MHPD bar** to access the MHPD application.



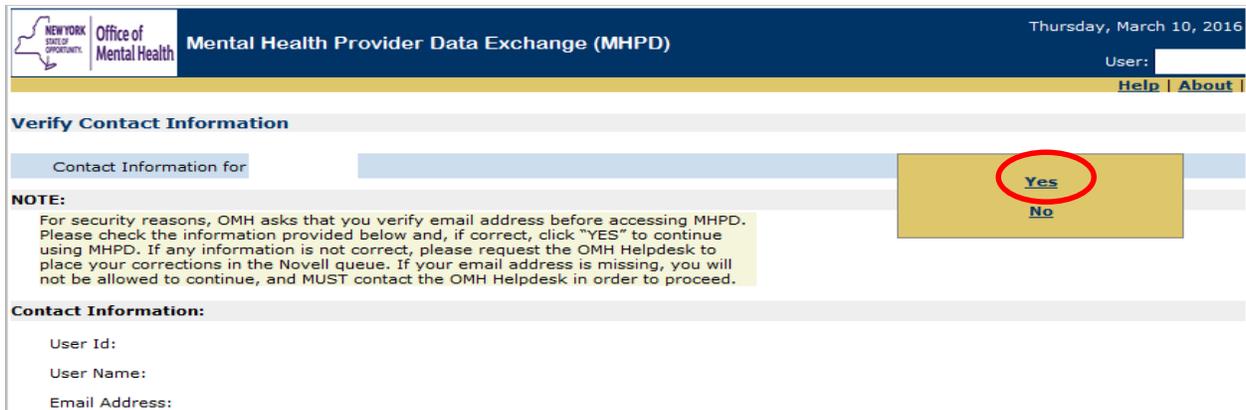
Note: If you click on the MHPD bar and nothing appears to happen, the Java script that loads the application may be blocked. The User must turn off all Pop-up Blockers. Examples of pop-up blockers can be found on the Yahoo toolbar, the Google toolbar and the MSN toolbar. Directions differ by Pop-up application. For assistance, please contact the OMH Helpdesk. For instructions on turning off the Pop-up Blocker in Internet, please refer to the Appendix.

When you click on the **MHPD bar**, the message: “Launching application... please wait” appears. If any System messages will appear, click the continue button.



Verify Contact Information

Please verify your contact information, and, if necessary, contact your Security Manager to update. If your email address is missing, you will not be allowed to continue, and the gold menu box will prompt you to exit the application until your Security Manager has entered your email in the Security Management System. Click **Yes** to verify your contact information.



⚠ **Note:** If the User clicks on the Yes after verifying contact information and nothing happens, you are using an updated version of Internet Explorer and must run MHPD in compatibility mode. For instructions on how to run MHPD or IE in compatibility mode, please refer to the Appendix.

General Information after Logging In and Navigating through MHPD

Below are general terms and definitions used throughout MHPD. All terms and definitions refer to full page screenshot on page 13.

Page Banner

Every MHPD web page displays a standard banner section displaying the application name “Mental Health Provider Data Exchange (MHPD)”, the current date and the User/Name of the person logged into the application. The example displays the banner, the date and User: Provider P 2222.



Tab Key

Press the tab Key to move to the next field.

List of Values

If a value must be selected from a set of predefined values, press the left mouse button on the arrow pointing down. The up / down arrow keys can also be used to view the set of pre-defined values.

Address Fields

Street address 1: Enter the physical street address such as house or building number (111 Main St, Bldg. 3), rural route box number (RR 4 State Highway 19) or the 911 assigned numbers (1142 State Highway 19).

Street address 2: Enter all other address information not entered on line 1, for example, P O Box 205.

Asterisk (*)

The asterisk is used to indicate mandatory fields. When the page is submitted, all information in these fields is validated. A message will appear if any mandatory fields have not been filled, and you will be required to fill them before continuing, which can be done by following the prompts.

Expand (+)

Click on the plus (+) sign to display additional information.

Collapse (-)

Click on the minus (-) sign to reduce additional information.

Ellipses (...)

When information in a list cannot be displayed in its entirety, ellipses are appended at the end of the text, indicating there is more text. This entire text is displayed in a tool tip, when you place the mouse pointer over the ellipses.

Information Balloon

Please click this icon  to obtain item definitions or specific directions.

Mental Health Provider Data Exchange (MHPD)

Tuesday, January 19, 2016

User: Program Administrator

[Help](#) | [About](#)

View Agency/Facility

Agency: [20202] - Test Facility (for user manual) Close

Agency Information:

Web Site: www.mhpd.testing.com

Chairperson of the Board:

Name:	Title:	First Name:	Last Name:	Degree:
Dr.	Dr.	Susan	Brown	M.D.
Position: Board Chair				
Address: 123 Main Street				
City, State Zip: Albany NY 12209-1010				
Phone: (123) 555-1000 x ____				

Facility: [2222] - Test Facility (for user manual)

Facility Information:

Address: 123 Main Street

P. O. Box:

City, State Zip: Albany NY 12209-____

County: Albany

Phone: (123) 555-1000 x ____

Fax: (123) 555-1001

Last Updated: 08/09/2013 11:49 AM

Director:

Name:	Title:	First Name:	Last Name:	Degree:
Mr.	Mr.	John	Doe	
Position: Acting Executive Director				
Phone: (123) 555-1000 x ____				
Email: executive.director@email.com				
Information Email: testfacility@email.com				

Facility Contacts:

#	Contact Name	Email	Phone
1:	Doe, John Patient Characteristics Survey (PCS) Coordinator	john.doe@omh.ny.gov	(518) 123-4567 x __89

Person to be notified, in addition to Facility Director, for matters described by the contact.

[View Facility Contacts](#)

Contact Information:

User Id: MHPD_P2222

User Name: Provider P 2222

Title: Title

Email Address: mhpd_p2222@omh.state.ny.us

Phone #: (123) 456-7890 x ____

Director's Information:

If your director's name or contact information is incorrect, please ask your MHPD Administrator to correct this information.

Name:	Title:	First Name:	Last Name:	Degree:
Mr.	Mr.	John	Doe	
Phone: (123) 555-1000 x ____				
Email Address: executive.director@email.com				

Directory Search - Searching for Facilities, Programs and Sites



The Directory Search page allows you to search for specific Facilities, Programs and Sites without having to scroll through an extensive list. By entering the search parameters in the **Search Criteria** section of the page, you're able to locate Facilities, Programs and Sites. For example, the "Directory Search" page below, displays all facilities whose names begin with "Test."

Name	City	Program Type
Facility: [20202/2222] - Test Facility (for user manual)		
Program: [008] - * ACHE Mohawk Clinic	Mohawk	[2100] - Clinic Treatment
Site: [1000] - [Main Site] ACHE Mohawk Clinic	Mohawk	
Site: [1001] - * ACHE Mohawk Satellite 1	Mohawk	
Site: [1002] - * ACHE Mohawk Satellite 2	Mohawk	
Program: [008] - * ACHE Mohawk Clinic	Mohawk	[2100] - Clinic Treatment
Site: [1000] - [Main Site] ACHE Mohawk Clinic	Mohawk	
Site: [1001] - * ACHE Mohawk Satellite 1	Mohawk	
Site: [1002] - * ACHE Mohawk Satellite 2	Mohawk	
Site: [1001] - * ACHE Mohawk Satellite 1	Mohawk	
Site: [1002] - * ACHE Mohawk Satellite 2	Mohawk	
Site: [1000] - [Main Site] Blended Case Management	Anytown	
Program: [013] - test	albany	[6820] - Adult Home Supportive Case Management
Site: [1000] - [Main Site] test	albany	
Program: [012] - Test Facility - Adult SCM	Albany	[6010] - Supportive Case Management (SCM)
Site: [1000] - [Main Site] Test Facility - Adult SCM	Albany	
Program: [011] - Test Facility - C&Y SCM	Albany	[6810] - Supportive Case Management (SCM)
Site: [1000] - [Main Site] Test Facility - C&Y SCM	Albany	
Program: [002] - Test Facility - HCBS Waiver	Albany	[2300] - Home and Community Based Services (HCBS) Waiver
Site: [1000] - [Main Site] Test Facility - HCBS Waiver	Albany	
Program: [007] - * Test Facility Licensed Program #1	Oneida	[2010] - Hospital for Mentally Ill
Site: [1000] - * [Main Site] Test Facility Licensed Program #1	Oneida	
Program: [006] - Test Unit D	Albany	[5990] - MICA Network
Site: [1000] - [Main Site] Test Unit D	Albany	
Program: [014] - Testing bab	Acme	[2990] - Coordinated Children's Service Initiative
Site: [1000] - [Main Site] Testing bab	Acme	
Program: [015] - Testing notification of former Admin - #2	Albany	[1760] - Advocacy/Support Services
Site: [1000] - [Main Site] Testing notification of former Admin - #2	Albany	
Program: [004] - Transportation Program	Anytown	[0670] - Transportation
Site: [1000] - [Main Site] Transportation Program	Anytown	

Directory Search page

The search results displays Facilities, Programs and Sites that match the search criteria. The search result displays the name and city of the Facility, Program and Site followed by the Program Type for the Program. The Facility records have a light grey background with the text bolded to help visually identify a Facility record when scrolling. The records are displayed in a "tree-style" format. Clicking the Expand (+) icon to the left edge of the Facility record will display all Programs for the Facility. Likewise, clicking the Collapse (-) icon for the Facility record will hide all Programs for the facility.

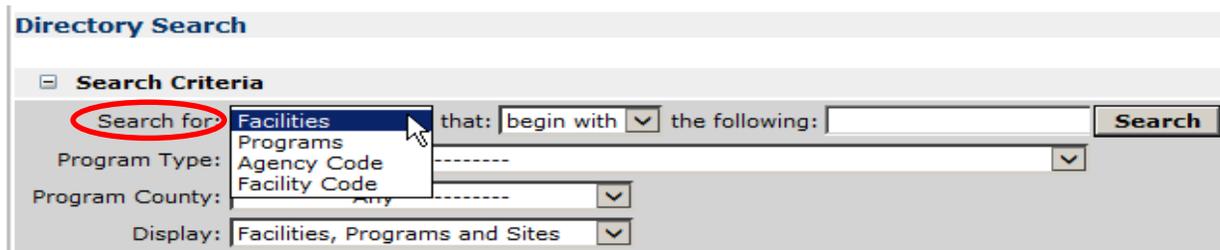
Note: Records displayed are internally filtered based on your security group. If you have statewide access, you are able to see all Facilities, Programs and Sites. If your security group is County, you will be able to view all Facilities and Programs for your county, as well as Facilities located in other counties that have a program in your county. A Provider can only see his or her Facility and its Programs and Sites.

The Directory Search page provides a means to view and update facilities, programs and sites. You can also add new unlicensed programs. These functions are achieved by clicking the various icons to the right of the search list.

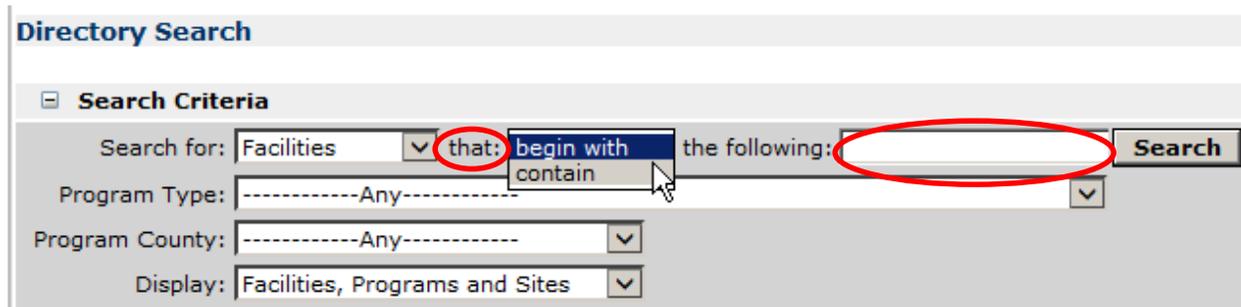


Filtering by Entering the Search Text

You can filter the search results by 4 criteria: Facilities; Programs; Agency Code; Facility Code.



You can filter the search results by entering search text in the “the following:” field. The number of characters entered in the search text depends on the type of search. **Begins with** requires a minimum of one character to be entered and **Contains** requires a minimum of three characters be entered for the search text or an error message will be displayed. The entered search text is not case sensitive, for example, search text “albany” will display records containing “Albany” or “ALBANY.”

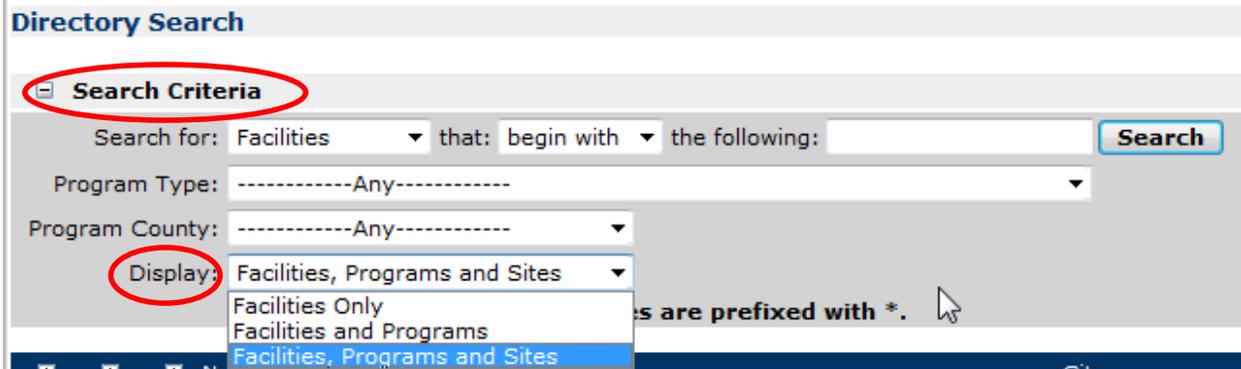


The search fields are listed below:

Fields	Description
Search for:	You can select Facilities, Programs, Agency Code or Facility Code from this list. When you select Facilities and click the Search button, all Facility names matching the criteria entered for the search text will be listed. The same applies when selecting Programs . Selecting Agency Code or Facility code selects the Agency or Facility that matches the code entered.
that:	You can select either begins with or contains from this list. When you select begins with and click the Search button, all Facility or Program names beginning with the entered search text are listed. When you select contains and press the Search button, all Facility or Program names containing the entered search text are listed. You <u>must</u> enter at least 3 characters when selecting contains .
the following:	Enter text values here for Facility or Program searches and numerical values for Agency and Facility Code searches.
Program Type:	When you select a Program Type , the list includes only those programs that match the selected program type.
Program County	When you select a Program County , the list includes only those programs that match the selected program county.
Display:	You can select Facilities Only, Facilities and Programs or Facilities, Programs and Sites . This field controls how records are displayed after clicking the Search button.

Displaying Facilities, Programs, and Sites

The search criteria field **Display** controls how records are displayed. You can choose to view either “**Facilities Only**,” “**Facilities and Programs**” or “**Facilities, Programs and Sites**.”



Display list

The example below shows a list of search results when “Facilities, Programs and Sites” is selected.

NEW YORK STATE Office of Mental Health
Mental Health Provider Data Exchange (MHPD)
Tuesday, March 24, 2015
User: Provider P 2222

Directory Search | My Change Requests | Administrative Actions | EZ PARs | Surveys | Reports | Help | About | Logout

Directory Search

Search Criteria

Search for: Facilities that: begin with the following: Search

Program Type: -----Any-----

Program County: -----Any-----

Display: Facilities, Programs and Sites

Unlicensed Programs and Sites are prefixed with *.

Name	City	Program Type
Facility: [20202/2222] - Test Facility (for user manual)		
Program: [008] - * ACME Mohawk Clinic	Mohawk	[2100] - Clinic Treatment
Site: [1000] - * [Main Site] ACME Mohawk Clinic	Mohawk	
Site: [1001] - * ACME Mohawk Satellite 1	Mohawk	
Site: [1002] - * ACME Mohawk Satellite 2	Mohawk	
Program: [010] - Advocacy for PCS Test	Albany	[1760] - Advocacy/Support Services
Site: [1000] - [Main Site] Advocacy for PCS Test	Albany	
Program: [005] - * AOT for tst	Albany	[0800] - ACT
Site: [1000] - * [Main Site] AOT for tst	Albany	
Program: [003] - Blended Case Management	Anytown	[0820] - Blended Case Management
Site: [1000] - [Main Site] Blended Case Management	Anytown	
Program: [012] - Test Facility - Adult SCM	Albany	[6810] - Supportive Case Management (SCM)
Site: [1000] - [Main Site] Test Facility - Adult SCM	Albany	
Program: [011] - Test Facility - C&Y SCM	Albany	[6810] - Supportive Case Management (SCM)
Site: [1000] - [Main Site] Test Facility - C&Y SCM	Albany	
Program: [002] - Test Facility - HCBS Waiver	Albany	[2300] - Home and Community Based Services (HCBS) Waiver
Site: [1000] - [Main Site] Test Facility - HCBS Waiver	Albany	
Program: [007] - * Test Facility Licensed Program #1	Oneida	[2010] - Hospital for Mentally Ill
Site: [1000] - * [Main Site] Test Facility Licensed Program #1	Oneida	
Program: [006] - Test Unit D	Albany	[5990] - MICA Network
Site: [1000] - [Main Site] Test Unit D	Albany	
Program: [004] - Transportation Program	Anytown	[0670] - Transportation
Site: [1000] - [Main Site] Transportation Program	Anytown	

♪ **Note:** Click the minus sign to the left of “Search Criteria” to hide the search criteria section, which in-turn displays more items of the search result list. (See example below)

Search Criteria

Search for: Facilities that: begin with the following: **Search**

Program Type: -----Any-----

Program County: -----Any-----

Display: Facilities, Programs and Sites

Search Criteria

Filtering by Program Type

You can filter the search results by selecting a program type from the Program Type list. In the example below “Clinic Treatment” was selected from the list

Directory Search

Search Criteria

Search for: Facilities that: begin with the following: **Search**

Program Type: -----Any-----

- [0800] - ACT
- [6820] - Adult Home Supportive Case Management
- [6920] - Adult Home Supportive Case Management Service Dollars
- [1760] - Advocacy/Support Services
- [2340] - Affirmative Business/Industry
- [7080] - Apartment/Support
- [7070] - Apartment/Treatment
- [8810] - Assertive Community Treatment-Service Dollars
- [1380] - Assisted Competitive Employment
- [0820] - Blended Case Management
- [0920] - Blended Case Management Service Dollars
- [7010] - C&Y Sexual Offender Project
- [2810] - Case Management Service Dollar Administration
- [7050] - Children & Youth Community Residence
- [4800] - Children and Youth Assertive Community Treatment
- [2100] - Clinic Treatment**
- [6110] - Community Residence for Eating Disorder Integrated Treatment Program
- [6340] - Comprehensive PROS with Clinical Treatment
- [7340] - Comprehensive PROS without Clinical Treatment
- [2860] - Conference of Mental Hygiene Directors
- [6080] - Congregate/Support
- [6070] - Congregate/Treatment
- [1310] - Continuing Day Treatment
- [2990] - Coordinated Children's Service Initiative
- [2600] - CPEP Crisis Beds
- [3130] - CPEP Crisis Intervention
- [1680] - CPEP Crisis Outreach
- [1920] - CPEP Extended Observation Beds
- [2680] - Crisis Intervention

Once you click the “Search” button the list will display only “Clinic Treatment” programs are displayed.

Name	City	Program Type
Facility: [20202/2222] - Test Facility (for user manual)		
Program: [008] - * ACME Mohawk Clinic	Mohawk	[2100] - Clinic Treatment
Site: [1000] - * [Main Site] ACME Mohawk Clinic	Mohawk	
Site: [1001] - * ACME Mohawk Satellite 1	Mohawk	
Site: [1002] - * ACME Mohawk Satellite 2	Mohawk	

Selectively displaying Programs and Sites

You can selectively choose to view Programs and Site records in the search results section. If the search results currently displays “Facilities only,” clicking the **Expand (+)** icon for the first facility in the search results list, will expand the display to list Programs for that Facility.

Directory Search

Search Criteria

Search for: Facilities that: begin with the following: Search

Program Type: -----Any-----

Program County: -----Any-----

Display: Facilities Only

OMH Licensed Programs and Sites are prefixed with *.

Name	City	Program Type
Facility: [20202/2222] - Test Facility (for user manual)		
Program: [008] - * ACME Mohawk Clinic	Mohawk	[2100] - Clinic Treatment
Program: [010] - Advocacy for PCS Test	Albany	[1760] - Advocacy/Support Services
Program: [005] - * AOT for tst	Albany	[0800] - ACT
Program: [003] - Blended Case Management	Anytown	[0820] - Blended Case Management
Program: [012] - Test Facility - Adult SCM	Albany	[6810] - Supportive Case Management (SCM)
Program: [011] - Test Facility - C&Y SCM	Albany	[6810] - Supportive Case Management (SCM)
Program: [002] - Test Facility - HCBS Waiver	Albany	[2300] - Home and Community Based Services (HCBS) Waiver
Program: [007] - * Test Facility Licensed Program #1	Oneida	[2010] - Hospital for Mentally Ill
Program: [006] - Test Unit D	Albany	[5990] - MICA Network
Program: [004] - Transportation Program	Anytown	[0670] - Transportation

Display Programs for the selected Facility

Likewise, you can hide the Programs displayed for the Facility by clicking the Collapse (-) icon. This functionality also applies when displaying Sites for Programs.

Viewing search results when “Facilities, Program and Sites” is selected

You can also use the **Expand (+)** and **Collapse (-)** icons to limit information or display more information on a list that includes “Facilities, Programs and Sites”. For instance, clicking on the first **Expand (+)** icon in the blue bar above the list will collapse lists to display “Facilities Only”. Click the first **Expand (+)** icon on the search result header bar. Likewise, the second **Expand (+)** icon will display “Facilities and Programs” and the third icon will display “Facilities, Programs and Sites.”

Directory Search

Search Criteria

Search for: Facilities that: begin with the following: **Search**

Program Type: -----Any-----

Program County: -----Any-----

Display: Facilities, Programs and Sites

OMH Licensed Programs and Sites are prefixed with *.

+	+	+	Name	City	Program Type
+			Facility: [20202/2222] - Test Facility (for user manual)		

The Add, Edit and View icons



Unlicensed programs may be set up through MHPD by clicking the **add** icon on the Facility display line. For more detailed information about Adding Programs, please click on MHPD Manuals located in the gold toolbar under Help. A separate web page appears with a link to the Change Request Manual under the Amendments to MHPD information header.

+	+	+	Name	City	Program Type
+			Facility: [20202/2222] - Test Facility (for user manual)		
+			Program: [008] - * ACME Mohawk Clinic	Mohawk	[2100] - Clinic Treatment
+			Program: [010] - Advocacy for PCS Test	Albany	[1760] - Advocacy/Support Services
+			Program: [005] - * AOT for tst	Albany	[0800] - ACT
+			Program: [003] - Blended Case Management	Anytown	[0820] - Blended Case Management

Editing Agency/Facility Information

Information can be changed by clicking the **edit** icon to the right of the Agency/Facility, Program, or Site name on the Directory Search page. Similarly, information in those records may be viewed by clicking the **view** icon .

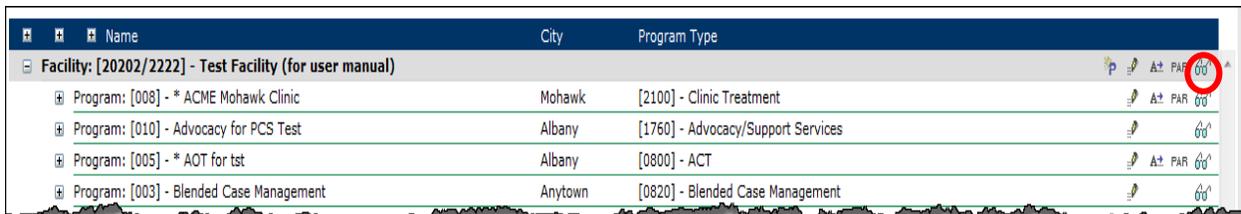
+	+	+	Name	City	Program Type
+			Facility: [20202/2222] - Test Facility (for user manual)		
+			Program: [008] - * ACME Mohawk Clinic	Mohawk	[2100] - Clinic Treatment
+			Program: [010] - Advocacy for PCS Test	Albany	[1760] - Advocacy/Support Services
+			Program: [005] - * AOT for tst	Albany	[0800] - ACT
+			Program: [003] - Blended Case Management	Anytown	[0820] - Blended Case Management

Note: Add and edit icons are not displayed in certain cases. For instance, licensed **site** information (for certain programs) **cannot** be changed using MHPD and hence the edit icon is not visible. Licensed programs may be edited for address corrections only; relocations require the submission of an Administrative Action. For details, see Frequently Asked Questions or click on MHPD Manuals located in the gold toolbar under Help. A separate web page appears with a link to the Administrative Actions Manual under the Amendments to MHPD Information header.

Viewing Agency/Facility Information

This feature allows you to view limited information for Agencies/Facilities.

To view Agency/Facility information, click on the **view** icon  located at the right end of the Facility record display line on the “Directory Search” page.



Name	City	Program Type	
Facility: [20202/2222] - Test Facility (for user manual)			
Program: [008] - * ACME Mohawk Clinic	Mohawk	[2100] - Clinic Treatment	
Program: [010] - Advocacy for PCS Test	Albany	[1760] - Advocacy/Support Services	
Program: [005] - * AOT for tst	Albany	[0800] - ACT	
Program: [003] - Blended Case Management	Anytown	[0820] - Blended Case Management	

Using the view icon returns the “View Agency/Facility” page

Mental Health Provider Data Exchange (MHPD) Tuesday, January 19, 2016
User: Program Administrator

View Agency/Facility

Agency: [20202] - Test Facility (for user manual) [Close](#)

Agency Information:

Web Site: www.mhpd.testing.com

Chairperson of the Board:

Name:	Title:	First Name:	Last Name:	Degree:
Dr.	Susan	Brown	M.D.	
Position:	Board Chair			
Address:	123 Main Street			
City, State Zip:	Albany	NY	12209-1010	
Phone:	(123) 555-1000	x	_____	

Facility: [2222] - Test Facility (for user manual)

Facility Information:

Address: 123 Main Street

P. O. Box:

City, State Zip: Albany NY 12209-____

County: Albany

Phone: (123) 555-1000 x _____

Fax: (123) 555-1001

Last Updated: 08/09/2013 11:49 AM

Director:

Name:	Title:	First Name:	Last Name:	Degree:
Mr.	John	Doe		
Position:	Acting Executive Director			
Phone:	(123) 555-1000	x	_____	
Email:	executive.director@email.com			
Information Email:	testfacility@email.com			

Facility Contacts:

#	Contact Name	Email	Phone
1:	Doe, John Patient Characteristics Survey (PCS) Coordinator	john.doe@omh.ny.gov	(518) 123-4567 x __89

Person to be notified, in addition to Facility Director, for matters described by the contact. [View Facility Contacts](#)

Information displayed on the View Agency/Facility web page is read only. After you finish viewing, click on “Close”, to return to the “Directory Search” page.

The information displayed on the View Agency/Facility page is as follows:

Agency Header

Contains the Agency Code and Agency Name

Agency Information

Displays the Agency’s website

Chairperson of the Board

Displays the name, address and phone number of the Chairperson of the Board for the Agency.

Facility Header

Displays the Facility Code and Name. It also carries add and edit icons, if the user is authorized to add programs or edit information for this facility.

Facility Information

This section displays the Facility address and contact information

Director

Displays the Director's contact information.

Facility Contacts

This section is found by clicking the **view** or **edit** buttons on the facility information line on the Directory Search page. It shows who the contact is at a facility for various topics. The contact's name, email, phone number, and contact type is displayed, A Provider Admin can add a contact, edit/update a contact, or delete a contact.



Editing a Facility Contact

To edit a facility contact, click on the Edit Facility Contacts link

Facility Contacts:

#	Contact Name	Email	Phone
1:	Doe, John Inpatient	john.doe@omh.ny.gov	(518) 123-4567 x __89

Person to be notified, in addition to Facility Director, for matters described by the contact.

[Edit Facility Contacts](#)

The facility contacts page is displayed. To edit a contact listed, click on the **pencil**.

Facility Contacts

Facility: [2222] - Test Facility (for user manual)

[New Facility Contact](#) [Return](#)

Name	Email Address	Phone #	Contact Type
Doe, John	john.doe@omh.ny.gov	(518) 123-4567 x __89	Inpatient

X 

The contact information can be updated on the Edit Facility Contact page. To edit the Contact Types, click in the appropriate box. When the Provider Admin has finished making the updates to a Facility Contact, click **Update Facility Contact** in the gold box in the upper right corner of the page, and then Return to get back to the Facility Contact page. Click **Return** again to get back to the View Agency/Facility page.

Edit Facility Contact

Facility: [2222] - Test Facility (for user manual)

Facility Contact Information:

Title: *First Name: M. I.: *Last Name:

Name:

Position:

*Email:

Phone number is generally not required. However, when requested you must enter the phone number.

*Phone: x

Off Hours Phone: x

Fax:

Enter address only if different from Facility's address. If entering a different address, please enter the complete address.

*Address:

P. O. Box:

*City, State Zip:

[Update Facility Contact](#)

[Delete Facility Contact](#)

[New Facility Contact](#)

Return

Fields prefixed with * are required.

***Contact Types: (Check at least one or more)**

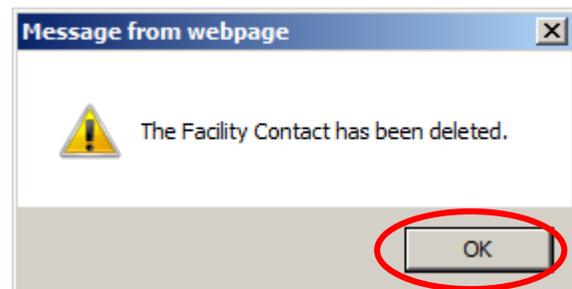
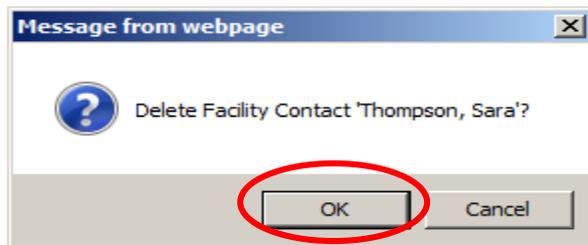
Contact Type	<input type="checkbox"/>
<input type="checkbox"/> 24/7 Incident Safety Check Contact	<input type="checkbox"/>
<input type="checkbox"/> Adult Services	<input type="checkbox"/>
<input type="checkbox"/> Care Coordination	<input type="checkbox"/>
<input type="checkbox"/> Children's Services	<input type="checkbox"/>
<input type="checkbox"/> Clinic	<input type="checkbox"/>
<input type="checkbox"/> Facility Incident Management E-mail	<input type="checkbox"/>
<input type="checkbox"/> Fiscal Contact	<input type="checkbox"/>
<input type="checkbox"/> Health Alerts	<input type="checkbox"/>
<input type="checkbox"/> Housing	<input type="checkbox"/>
<input type="checkbox"/> Information	<input type="checkbox"/>
<input type="checkbox"/> Inpatient	<input checked="" type="checkbox"/>
<input type="checkbox"/> Justice Center	<input type="checkbox"/>
<input type="checkbox"/> NIMRS	<input type="checkbox"/>
<input type="checkbox"/> PCS Coordinator	<input type="checkbox"/>
<input type="checkbox"/> PROS	<input type="checkbox"/>
<input type="checkbox"/> Quality Improvement	<input type="checkbox"/>
<input type="checkbox"/> Recipient Run Services	<input type="checkbox"/>

Delete a Contact

To delete a contact, go to the Facility Contacts page as described above and click the **X** on the Facility Contact page.

Facility Contacts			
Facility: [2222] - Test Facility (for user manual)			
New Facility Contact Return			
Name	Email Address	Phone #	Contact Type
Doe, John	john.doe@omh.ny.gov	(518) 123-4567 x __89	Inpatient
Thompson, Sara	sara.thompson@yahoo....	(518) 555-1212	Information, PCS Coordinator

Click **OK** in the message box that comes up to delete the contact and **OK** in the box that the Facility Contact has been deleted. The Provider Admin is now brought back to the Facility Contacts page.



Add a Contact

To add a contact, go to the Facility Contact page as described above and click on the **New Facility Contact** tab.

Facility Contacts			
Facility: [2222] - Test Facility (for user manual)			
New Facility Contact Return			
Name	Email Address	Phone #	Contact Type
Doe, John	john.doe@omh.ny.gov	(518) 123-4567 x __89	Inpatient
Thompson, Sara	sara.thompson@yahoo....	(518) 555-1212	Information, PCS Coordinator

Below is the blank New Facility Contact page. The Provider Admin fills out the Facility Contact information. A check must also be placed in the appropriate Contact Types box indicating which topics the user should be the contact person on. Once the New Facility Contact information has been entered, click **Add Facility Contact** in the gold box in the upper right corner of the page.

New Facility Contact

Facility: [7205] - Access: Supports for Living, Inc.

[Add Facility Contact](#)
[Return](#)
Fields prefixed with * are required.

Facility Contact Information:

Title: *First Name: M. I.: *Last Name:

Name:

Position:

*Email:

*Phone: Phone number is generally not required. However, when requested you must enter the phone number.
 () - - - - x

Off Hours Phone: () - - - - x

Fax: () - - - -

*Address: Enter address only if different from Facility's address. If entering a different address, please enter the complete address.

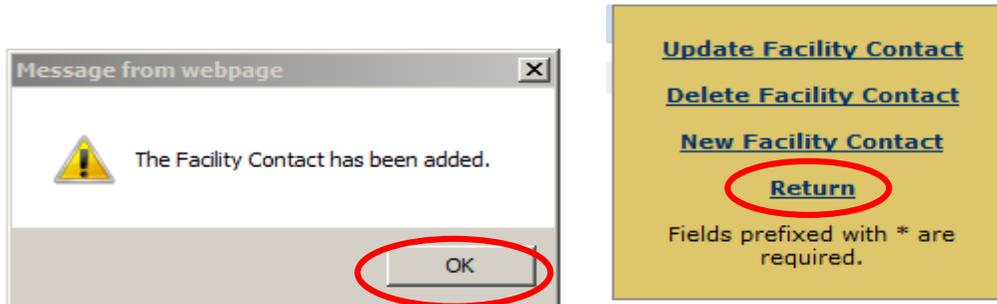
P. O. Box:

*City, State Zip: NY -

***Contact Types: (Check at least one or more)**

Contact Types:	Contact Type	Input
	24/7 Incident Safety Check Contact	<input type="checkbox"/>
	Adult Services	<input type="checkbox"/>
	Care Coordination	<input type="checkbox"/>
	Children's Services	<input type="checkbox"/>
	Clinic	<input type="checkbox"/>
	Facility Incident Management E-mail	<input type="checkbox"/>
	Fiscal Contact	<input type="checkbox"/>
	Health Alerts	<input type="checkbox"/>
	Housing	<input type="checkbox"/>
	Information	<input type="checkbox"/>
	Inpatient	<input type="checkbox"/>
	Justice Center	<input type="checkbox"/>
	NIMRS	<input type="checkbox"/>
	PCS Coordinator	<input type="checkbox"/>
	PROS	<input type="checkbox"/>
	Quality Improvement	<input type="checkbox"/>
	Recipient Run Services	<input type="checkbox"/>

After clicking Add Facility Contact, click **OK** in the message box that is displayed and click **Return** in the gold box in the upper right corner to be brought back to the Facility Contact page.



Hide and Display Sections of the Page

You can also hide or display certain portions of the page by clicking the Collapse (-) or Expand (+) icons present at the start of each header. The example below displays how Agency information is hidden. This feature can be very helpful when printing and sharing printed documents.

Agency/Facility Table:

Agency	Facility
[20202] - Test Facility (for user manual)	[2222] - Test Facility (for user manual)

Facility Information:

Address: 123 Main Street

P. O. Box:

City, State Zip: Albany NY 12209-____

County: Albany

Phone: (123) 555-1000 x ____

Fax: (123) 555-1001

Last Updated: 08/09/2013 11:49 AM

Director:

Name	Title	First Name	Last Name	Degree
Mr. John Doe	Acting Executive Director	John	Doe	

Position: Acting Executive Director

Phone: (123) 555-1000 x ____

Email: executive.director@email.com

Information Email: testfacility@email.com

Facility Contacts:

#	Contact Name	Email	Phone
1:	Doe, John Patient Characteristics Survey (PCS) Coordinator	john.doe@omh.ny.gov	(518) 123-4567 x __89

Person to be notified, in addition to Facility Director, for matters described by the contact.

[View Facility Contacts](#)

Viewing Program Information

This feature allows you to view limited Program information. To view Program information click on the **view** icon  located to the right of a Program record on the “Directory Search” page.

Name	City	Non-PMHS	Program Type
Facility: [90320/0045] - Acme Psychiatric Center	Newburg		
Program: [410] - Acme Psychiatric Center - CET	Buffalo		[0610] - Recreation
Site: [1001] - [Main Site] Acme Psychiatric Center - ...	Buffalo		
Program: [007] - * Acme Psychiatric Center - FCH - 1	ILION		[0040] - Family Care
Program: [039] - * Acme Psychiatric Center - FCH - 2	Clinton		[0040] - Family Care
Program: [009] - * Acme Psychiatric Center - FCH - 3	POLAND		[0040] - Family Care
Program: [004] - * Acme Psychiatric Center - FCH - 4	CLEVELAND		[0040] - Family Care

Using the view icon to display the “View Program” page

Information displayed on the View Program page is read **only**. You can also hide and display Agency and Facility details on this page. After you finish viewing, click on **“Close”**, to return to the “Directory Search” page.

“View Program” Page

Office of Mental Health User: SYSTEM ADMIN

[Help](#) | [About](#)

View Program

Agency: [20202] - Test Facility (for user manual) Close

Facility: [2222] - Test Facility (for user manual)

Program: [002] - Test Facility - HCBS Waiver

CFR Site ID #: [2222002]

Program Information:

Address: 123 Main Street

P. O. Box:

City, State Zip: Albany NY 12209-____

County: Albany

Phone: (123) 555-1000 x ____

Fax: (123) 555-1001

OMH Licensed: No

Program Type: [2300] - Home and Community Based Services (HCBS) Waiver

Program Status: Open

Open Date: 07/01/2010

Last Updated: 8/3/2010 1:58:49 PM

Program Manager:

Name:	Title:	First Name:	Last Name:	Degree:
Position:	Dr.	Tom	Smith	Ph.D.
Phone:	Director	(123) 555-1000	x ____	
Email:		tom@email.com		

The information displayed on the “View Program” page is as follows:

Agency Header

Contains the Agency Code and Name. You can click the Expand (+) icon to the left of the Agency header to display Agency Information.

Facility Header

Contains the Facility Code and Name. You can click the Expand (+) icon to the left of the Facility header to display Facility Information. It also carries add and edit icons, the user is authorized to add programs or edit information for this facility.

Program Header

Contains the Program Code and Name. Licensed programs are prefixed with an asterisk (*.) It also carries the edit icons, the user is authorized to add programs or edit information for this facility.

Program Information

This section displays the Program address and contact information.

Program Manager

This section displays the Program Manager's contact information.

Capacity

This section displays various Capacity related information **specific to the Family Care programs**. A sample View Program page for Family Care programs is displayed below. Capacity details for other types of programs are located at the Site level.

Position:	Acting Director
Phone:	(315) 213-5689 x ____
Capacity:	
Beds:	3
Viable Beds:	3
Personal Care Beds:	0

Viewing Site Information

This feature allows you to view limited Site information. To view Site information click on the **view** icon  located to the right of the Site record on the "Directory Search" page.

Name	City	Non-PMHS	Program Type	
Facility: [90320/0045] - Acme Psychiatric Center	Newburg			
Program: [410] - Acme Psychiatric Center - CET	Buffalo		[0610] - Recreation	
Site: [1001] - [Main Site] Acme Psychiatric Center - ...Buffalo				
Program: [007] - * Acme Psychiatric Center - FCH - 1	ILION		[0040] - Family Care	
Program: [039] - * Acme Psychiatric Center - FCH - 2	Clinton		[0040] - Family Care	
Program: [009] - * Acme Psychiatric Center - FCH - 3	POLAND		[0040] - Family Care	
Program: [004] - * Acme Psychiatric Center - FCH - 4	CLEVELAND		[0040] - Family Care	

Using the view icon to display the “View Site” page

Information displayed on the View Site page is read **only**. You can also display and hide Agency, Facility and Program details on this page. After you finish viewing, click on “**Close**”, to return to the “Directory Search” page.

The “View Site” Page

♪ **Note:** Not all information listed here is available for all program types at site level. Refer to Days/Hours of Operation below.

View Site					
Agency:	[20202] - Test Facility (for user manual)				Close
Facility:	[2222] - Test Facility (for user manual)				
Program:	[004] - Transportation Program				
Site:	[1000] - [Main Site] Transportation Program				
Site Information:					
Address:	123 Main Street				
City, State Zip:	Anytown	NY	12345-____		
County:	Albany				
Main Site:	Yes				
Program Type:	[0670] - Transportation				
Last Updated:	8/10/2010 9:50:54 AM				
Population Served:					
Adolescents:	Yes				
Adults:	Yes				
Children:	Yes				
Capacity:					
Service Capacity:	100	# of persons expected to be served pursuant to program model			
Caseload:	30	Average # of persons served in a month			
Days/Hours of Operation:					
Day	Primary Start Time	Primary End Time	Secondary Start Time	Secondary End Time	Comment
Monday	10:00 AM	07:00 PM			
Tuesday	10:00 AM	07:00 PM			
Wednesday	10:00 AM	07:00 PM			
Thursday	10:00 AM	07:00 PM			
Friday	10:00 AM	07:00 PM			
Saturday					
Sunday					
Holiday					
Other					

The information displayed on the “View Site” page is as follows:

Agency Header

Contains the Agency Code and Name. You can click the Expand (+) icon to the left of the Agency header to display Agency Information.

Facility Header

Contains the Facility Code and Name. You can click the Expand (+) icon to the left of the Facility header to display Facility Information. It also carries add and edit icons, if the user is authorized to add programs or edit information for this facility.

Program Header

Contains the Program Code and Name. Licensed programs are prefixed by an asterisk (*.) You can click the Expand (+) icon to the left of the Program header to display Program Information. It also carries the edit icons, if the user is authorized to add programs or edit information for this facility.

Site Header

Contains the Site Code and Name. If the site belongs to a licensed program, the Site name is prefixed with an asterisk (*.) If the site is the Main Site of the Program, the Site name is prefixed with the text [Main Site.] It also carries the edit icon, if the user is authorized to edit information for this facility.

Site Information

This section displays the Site Address and other pertinent information.

Population Served

(Program Type Specific)

This section allows the user to view the numbers of individuals served by the Site according to age group.

Capacity

For certain program types this section displays the Service Capacity description for the Site.

Case Management Information

(Program Type Specific)

This section displays staff to client ratios and number of case managers for Blended Case Management (BCM), Integrated Case Management (ICM) and Supportive Case Management (SCM) sites.

Additional Services

(Program Type Specific)

This section shows additional services, such as activity therapy or family treatment, provided by licensed outpatient programs.

Days/Hours of Operation

This section displays the Primary and Secondary Days/Hours of Operation for Sites of Outpatient and Some Unlicensed Support Service Programs.

My Change Requests

Clicking the **My Change Requests** tab brings the user to a listing of any change requests that they have submitted. More Change Request information may be found by clicking on MHPD Manuals located in the gold toolbar under Help. A separate web page appears with a link to Change Requests under the Amendments to MHPD Information header.



The user is able to filter using the various criteria below.

My Change Requests

Filter Criteria

CR#: Auspice: State Non-State

Request Date: Status: New Request Pending Status Date:

Thru: Approved Denied Thru:

Agency Code: Facility Code or Name:

Program Type:

CR#	Request Date	Type	Status	Status Date	County	Facility	Name	Requestor
-----	--------------	------	--------	-------------	--------	----------	------	-----------

Administrative Actions

The Administrative Action feature in MHPD allows licensed providers an automated system to submit prior notification to OMH and Counties of proposed changes to their licensed programs when a PAR application is not required by regulation.



Clicking on the above link will bring the user to the Administrative Actions page. More Administrative Action information may be found by clicking on MHPD Manuals located in the gold toolbar under Help. A separate web page appears with a link to Administrative Actions under the Amendments to MHPD Information header.

Administrative Actions

Filter Criteria

AA#: Request Date: Status Date: **Filter**

Facility Code or Name: Thru: Thru:

Status: Submitted Re-submitted Pending Returned
 Supported Supported with conditions Not supported Cancelled

Program Type:

AA#	Request Date	Type	Status	Status Date	Facility	Name	County	Region	Requestor	Com
-----	--------------	------	--------	-------------	----------	------	--------	--------	-----------	-----

EZ PARs

Information for completing applications for projects that fall under EZ PAR that are required by regulation to be approved by the Office of Mental Health (OMH) before an agency can begin the project. The EZ PAR application within MHPD is designed to tailor the information required depending on the nature of the proposed project. Projects that require an EZ PAR are generally larger in scope than those that require just an Administrative Action, but smaller in scope than those requiring a comprehensive PAR.



Clicking on the **EZ PARs** link will bring the user to the EZ PAR page. More EZ PAR information may be found by clicking on MHPD Manuals located in the gold toolbar under Help. A separate web page appears with a link to EZ PAR under the Amendments to MHPD Information header

EZ PARs

Filter Criteria

EZ PAR#: Request Date: Status Date: **Filter**

Facility Code or Name: Thru: Thru:

Status: Submitted Re-submitted Pending Returned On Hold
 Review Approved Approved with conditions Not approved Withdrawn

Program Type:

Project Manager:

EZ PAR#	Request Date	Type	Status	Status Date	Facility	Name	County	Region	Requestor	Com
---------	--------------	------	--------	-------------	----------	------	--------	--------	-----------	-----

Surveys

Under the Surveys tab you will find the Facility Survey done biennially, Case Management Annual Survey, and the Total Unique Individuals Served Quarterly Survey. Click on the **pencil to the right** of the survey name to open and complete the survey.

The screenshot shows the top navigation bar with the date "Wednesday, March 2, 2016" and a "User:" field. The navigation menu includes "Directory Search", "My Change Requests", "Administrative Actions", "EZ PARs", "Surveys", "Reports", "Help", "About", and "[Logout]". The "Surveys" tab is highlighted with a red circle. Below the navigation bar, the "Surveys" section is titled "Surveys" and contains a table with the following data:

Survey Name	Survey Type	Start Date	Due Date	
Total Unique Individuals Served Q1 2015	Total Unique Individuals Served	04/01/2015	04/30/2015	
Facility Survey - 2015	For Patient Characteristics Survey	01/02/2015	04/29/2015	
Case Management Annual Survey - 2014	Case Management Annual Survey	01/02/2015	03/17/2015	

Reports

The CFR (Consolidated Fiscal Report) Report can be viewed by users with various types of access including those with MHPD Provider Admin and Provider User access.

The screenshot shows the top navigation bar with the date "Wednesday, March 2, 2016" and a "User:" field. The navigation menu includes "Directory Search", "My Change Requests", "Administrative Actions", "EZ PARs", "Surveys", "Reports", "Help", "About", and "[Logout]". The "Reports" tab is highlighted with a red circle.

This report lists the CFR Site ID and Program Name for each Facility. The report displays Programs grouped by Facility. The parameters for this report include: Open Date and Sort.

Reports

MHPD Reports:

CFR Programs Report:

This report lists the CFR Site ID and Program Name for each Facility. The report displays Programs grouped by Facility. The parameters for this report include: Open Date and Sort.

Facility Code:

Facility Name:

Open Date:

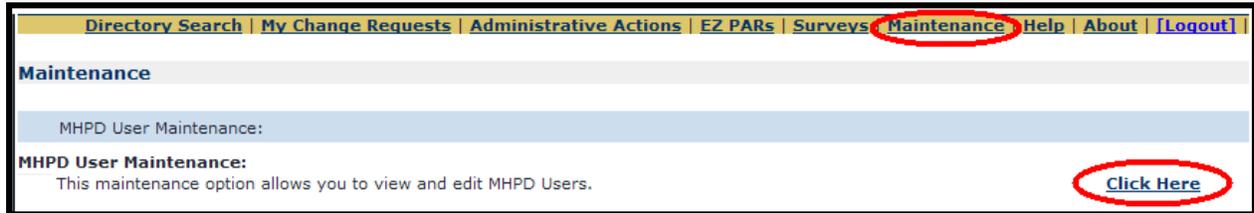
Sort:

[Print Preview](#)

User Maintenance

The Maintenance Section allows a **Provider Admin or County Admin** to indicate who can submit facility or program and site change requests, who should receive email notifications of change requests and who can review rate changes. Selecting "**Maintenance**" in the menu bar

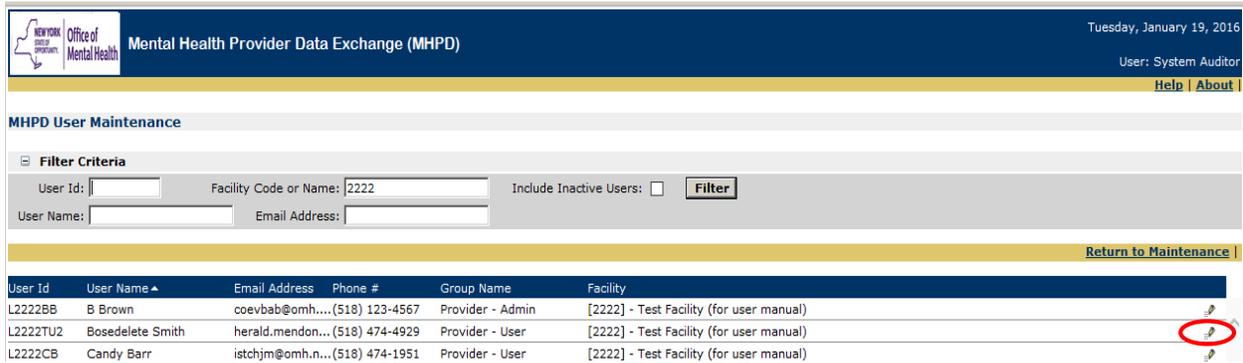
will take you to the Maintenance page, where you can select MHPD User Maintenance by clicking where indicated.



The screenshot shows a navigation bar with the following items: [Directory Search](#), [My Change Requests](#), [Administrative Actions](#), [EZ PARs](#), [Surveys](#), [Maintenance](#), [Help](#), [About](#), and [\[Logout\]](#). The 'Maintenance' link is circled in red. Below the navigation bar, the 'Maintenance' section is titled 'MHPD User Maintenance:' and contains the text 'This maintenance option allows you to view and edit MHPD Users.' A 'Click Here' link is circled in red.

MHPD User Maintenance List of Users

The User Maintenance screen offers the option of a filter to assist you in finding the correct user from the list of users you will see below. To edit the user, select the pencil icon to the far right of the user's name.



The screenshot shows the 'Mental Health Provider Data Exchange (MHPD)' interface. The top navigation bar includes the New York State Office of Mental Health logo, the title 'Mental Health Provider Data Exchange (MHPD)', the date 'Tuesday, January 19, 2016', and the user 'User: System Auditor'. Below the navigation bar, the 'MHPD User Maintenance' section is displayed. It features a 'Filter Criteria' section with input fields for 'User Id', 'Facility Code or Name' (containing '2222'), 'User Name', and 'Email Address'. There is also an 'Include Inactive Users' checkbox and a 'Filter' button. A 'Return to Maintenance' link is located at the bottom right of the filter section. Below the filter section is a table of users with the following columns: User Id, User Name, Email Address, Phone #, Group Name, and Facility. The table contains three rows of user data. The pencil icon in the rightmost column of the second row is circled in red.

User Id	User Name	Email Address	Phone #	Group Name	Facility	
L2222BB	B Brown	coevbab@omh....	(518) 123-4567	Provider - Admin	[2222] - Test Facility (for user manual)	
L2222TU2	Bosedelele Smith	herald.mendon...	(518) 474-4929	Provider - User	[2222] - Test Facility (for user manual)	
L2222CB	Candy Barr	istchjm@omh.n...	(518) 474-1951	Provider - User	[2222] - Test Facility (for user manual)	

This will bring up the “Edit MHPD User” screen.

Edit MHPD User

MHPD User: [] - [Update](#)
[Return](#)

User Information:

User Id:
User Name:
Title: Title
Email Address: mhpd@omh.ny.gov
Phone #: (518) x ____
Group Name: Provider - Admin
Facility: [2222] - Test Facility (for user manual)

Change Requests (CRs):

Can Submit Facility CRs:
Can Submit Program CRs:
Email Contact:

Rate Change Review:

Rate Change Reviewer:

Can Submit Facility CRs

In order to have the ability to submit Facility level change requests, you must be a user with Provider Admin, County Admin or Field Office Admin access. If you need Admin status, contact the Security Manager at your facility, who can update your access in the Security Management System. Once the Security Manager grants Admin access, you will have the ability to submit facility level CRs such as updating the name and contact information for a new Executive Director. Having Admin access will also enable you to submit program level CRs.

Can Submit Program CRs

A User with Provider User or Provider Admin access has the ability to submit program level change requests.

⚠ **Note:** Even though you have Provider User or Provider Admin access, you have to make sure the boxes are checked in MHPD User Maintenance as shown on page 36 under Change Requests. Granting access in SMS to a new user doesn't automatically default to these boxes being checked. However, the boxes will be checked after a new user logs in for the first time. If a user is having access issues after being granted access, a Provider Admin can go into MHPD User Maintenance and make sure the boxes are checked at the appropriate level.

Email Contact

As shown in the screen below, by clicking the box next to Email Contact, you can designate this user to receive all notifications that are sent by MHPD. To change the primary Email Contact, simply select the correct user from the MHPD User Maintenance List of Users and click the **Email Contact** on their Edit screen. Selecting a new primary contact will automatically remove the old one. When finished, click "**Update**" to save the change. When a User leaves your employ, make sure to uncheck Email Contact and designate another person or persons for notifications.

Edit MHPD User

MHPD User: [] - []

[Update](#)
[Return](#)

User Information:

User Id:
User Name:
Title:
Email Address:
Phone #: () x ____
Group Name: Provider - Admin
Facility:
Security Managers:

Security Manager's Name	Email Address	Phone #
		(123) 456-7890 x 1234

Listed in Dropdowns: Yes

Assigned Facilities:

Assigned Facilities:	
[7810] 1003 Walnut Street/dba Sol Stone Center	<input type="checkbox"/>
[9233] 163rd Street Improvement Council	<input type="checkbox"/>
[8844] A Test Psych Center	<input type="checkbox"/>
[7788] ABVI Goodwill Industries Greater Rochester	<input type="checkbox"/>
[7062] ACMH, Inc.	<input type="checkbox"/>
[8219] AIDS Center of Queens County, Inc.	<input type="checkbox"/>
[9235] ARISE Child and Family Services, Inc.	<input type="checkbox"/>
[8532] Abbott House, Inc.	<input type="checkbox"/>

Change Requests (CRs):

Can Submit Facility CRs:
 Can Submit Program CRs:
 Email Contact:

Rate Change Review:

Rate Change Reviewer:

Rate Change Reviewer

By clicking the box next to **Rate Change Reviewer** (as seen in the above screenshot), you can designate this user to access the Rate Change Review Screen located on the Surveys Menu. Its purpose is to present, for a specific agency, all of the applicable Medicaid rate changes for Clinic, CDT, Day Treatment, Partial Hospitalization and IPRT programs that have been transmitted by the Office of Mental Health (OMH) to the Department of Health (DOH), and to record the reviewing of the Rate Report for each such rate change transmittal by the designated Medicaid Rate Reviewer(s) at each agency.

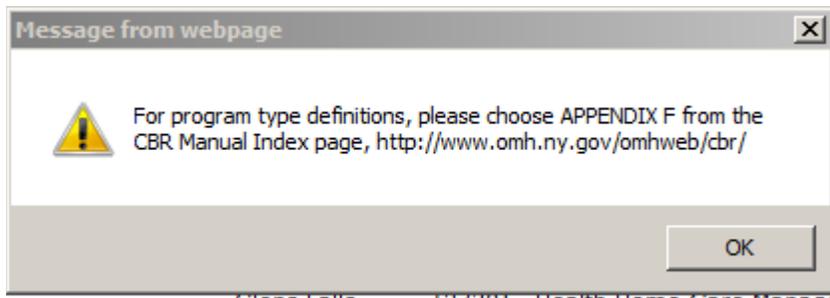
Help Tab

Clicking on the Help tab displays a link to the Program Type Glossary and MHPD Manuals.



Program Type Glossary

Click on the **Program Type Glossary**, and the following box comes up:



Click on the **OK** button brings you to:

**New York State
Office of Alcoholism and Substance Abuse Services (OASAS)
Office of Mental Health (OMH)
Office of People with Developmental Disabilities (OPWDD)
Consolidated Budget Reporting (CBR) and Claiming Manual**

January 1, 2014 to December 31, 2014
July 1, 2014 to June 30, 2015
Issued: January 12, 2016

[2014 and 2014/15 CBR Manual](#) | [2014 CFR appendices](#) | [2014/2015 CFR appendices](#)

Just scroll down to Appendix F.

New York State Consolidated Fiscal Reporting and Claiming Manual	Subject: Appendix F – OMH Program Types, Definitions and Codes	Section: 39.0	Page: 39.1
	Reporting Period: July 1, 2014 to June 30, 2015		Issued: 05/15

MHPD Manuals

Click on **MHPD Manuals**, and you are brought to the page shown below. Here you will find this manual, plus Amendments to MHPD Information, Survey information, and Contact Us information.

Mental Health Provider Data Exchange (MHPD) New York State Office of Mental Health



Please see the **Basic User Manual** for information on using MHPD, and then the section or sections you need for instructions on using specific applications in MHPD

- [MHPD Basic User Manual](#) – Instructions for basic use of MHPD including logging in and out; searching for and viewing Facilities, Programs, Units and Sites; configuring your email and browser settings.

Amendments to MHPD Information

- [Change Requests](#) – Instructions for completing a Change Request in MHPD for additions, updates and closures for Unlicensed Programs and Sites, and for correcting basic Facility information
- [Administrative Actions](#) – Instructions for completing an Administrative Action in MHPD to submit notification of proposed changes to Licensed Programs, Units and Sites for changes that do not require submission of a Prior Approval Review (PAR) application
- [EZ PAR](#) – Instructions for completing applications for projects that fall under EZ PAR that are required by regulation to be approved by the Office of Mental Health (OMH) before an agency can begin the project. The EZ PAR application within MHPD is designed to tailor the information required depending on the nature of the proposed project. Projects that require an EZ PAR are generally larger in scope than those that require just an Administrative Action, but smaller in scope than those requiring a comprehensive PAR.

Surveys

- [Facility Survey](#) – Instructions for completing bi-annual Facility Survey to correct and update Facility, Program, Unit and Site information in MHPD in preparation for the Patient Characteristics Survey
- [Rate Change](#) – Review Instructions for gaining access to the Rate Change Review screen, and how to view Medicaid rate changes for Clinic, Continuing Day Treatment (CDT), Day Treatment, Partial Hospitalization and Intensive Psychiatric Rehabilitative Treatment (IPRT) programs that have been transmitted by OMH to the Department of Health (DOH).
- [Total Unique Individuals Served Survey](#) – Instructions for completing the quarterly Total Unique Individuals Served Survey.

Contact us:

For help with Training Enrollment or accessing the MHPD application, please contact the OMH Helpdesk at 1-800-HELP-NYS (1-800-435-7697).

Comments or questions about the information on this page can be directed to the [Bureau of Data Infrastructure](#).

The About Screen

Access the About Menu from the Directory Search screen

A user can access the **About** menu from any page.



The About page displays the version number of the MHPD application, the phone number and the email address for the Help Center.

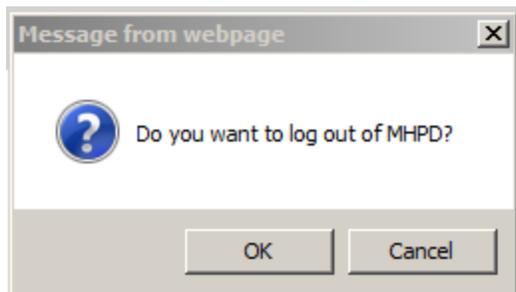


Logging out of MHPD

Clicking Logout from the Directory Search page allows you to exit the MHPD application. Click on the **logout** tab, as illustrated below.



Click “OK” to logout of the MHPD application. You will be asked to confirm that you do wish to logout, then after clicking “OK” you will see a screen confirming that you are logged out.



Appendix

Email Notifications

MHPD automatically generates email notifications in the following cases:

- When a request is **submitted** by a requestor
- When a request is **approved** by an MHPD Central Office Admin
- When a request is **denied** by an MHPD Central Office Admin
- When a **Central Office Admin adds** or **modifies** the field “Administrator’s Comments” of a Change Request and **updates** the record.
- When a **Field Office** person **adds** or **modifies** the field “Field Office Comments” of a Change Request and **updates** the record.
- When a **County** person **adds** or **modifies** the field “County Comments” of a Change Request and **updates** the record.

The Email Notification

Email notifications are generated automatically and are sent from the mailbox of a pre-assigned MHPD Administrator.

♪ **Note - Email Contact:** Enables user to receive notifications of change requests. When you remove a person’s ID from notification, they are not notified on CRs created from that moment forward; it does not impact CRs that have not yet been accepted or denied because each CR has IDs attached to it for the various notification roles. Field Office user must be in the FO Administrator role to receive emails.

The subject line of the email provides some basic information pertaining to the request:

- Type of Request (Add Program, Update Program, etc.)
- CONCERTS Table IDs (Sponsor, Agency, Facility, Program/Unit)
- CR# (Change Request Number)
- Status of Request (This is blank when a request is submitted. It displays either APPROVED or DENIED when the change request is approved or denied by the MHPD Administrator).

The body of the email provides details regarding the change request: type of request, code and name of the Facility, Program and/or Site, CONCERTS ID, requestor's notes. The email also provides a link to the change request and how to use the link. If a change request is denied, the body of the email contains the reason for denial.

Administrators, persons in the Field Office role and persons in the County role can view each other's comments.

♪ **Note:** Forwarding an email link to another person: If the email link is forwarded to another MHPD user, he/she can only view the request if they have the appropriate access. For example: A Field Office user can view the request only if the change request belongs under his or her region.

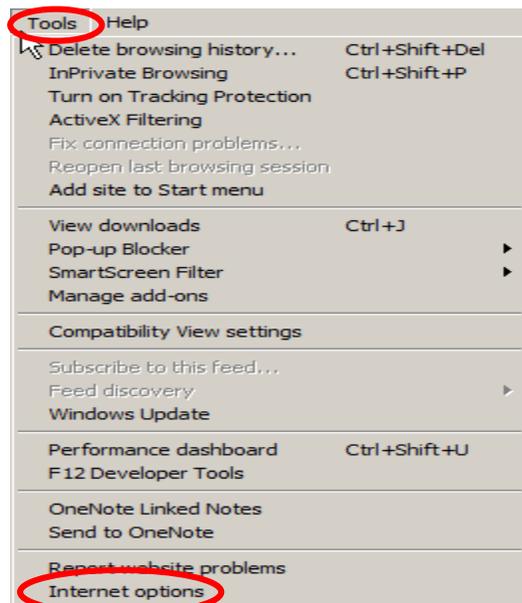
♪ **Note:** If the requestor's email is invalid, the Administrator will receive a delivery status notification failure email.

Configuring Internet Explorer

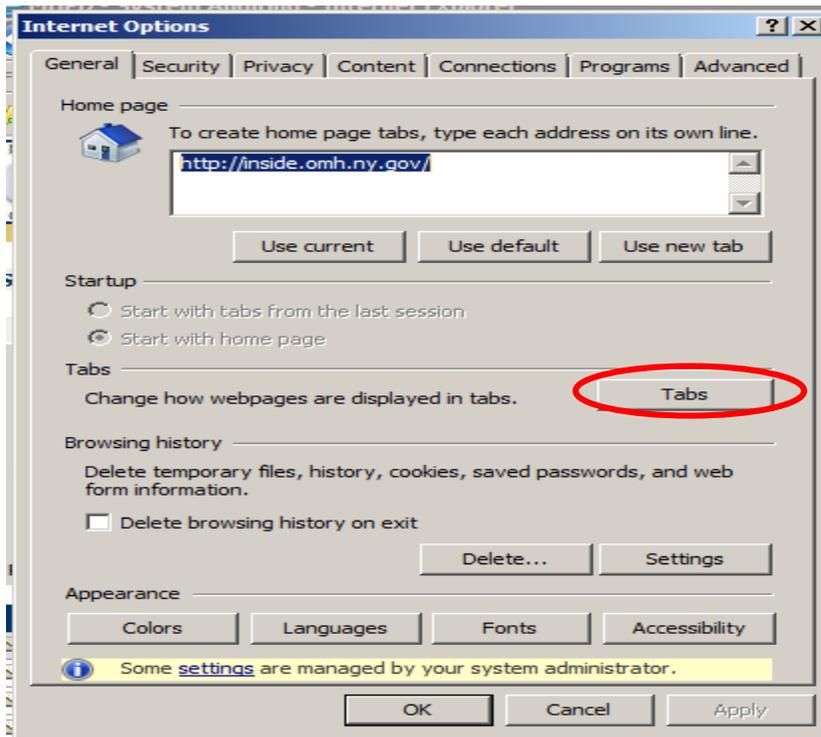
If the email link in the Change Request notification you receive does not open the CR in the application, your Internet Explorer may need to be configured to use the existing window to open a hypertext link.

When logged into MHPD, the MHPD links present in the emails should direct you to the change request. If you are having difficulty accessing the MHPD link present in the email messages, please make sure Internet Explorer is configured correctly as described below.

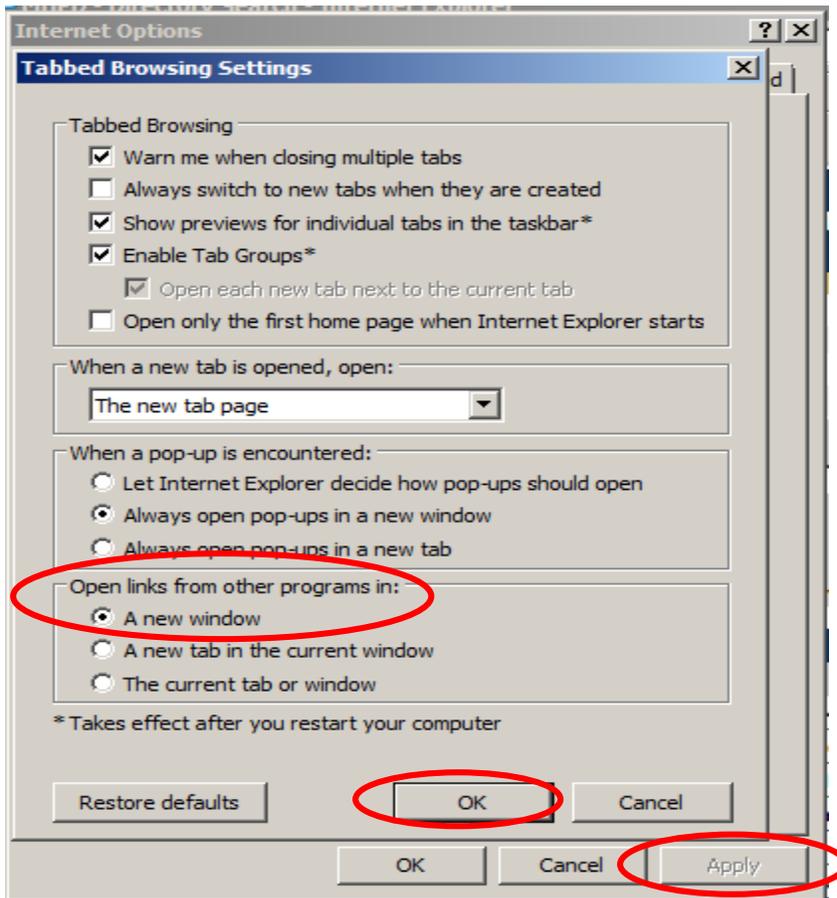
Select "**Tools**" from the menu, then select "**Internet Options**" from the drop down menu.



Click **Change how webpages are displayed in tabs** next to **Tabs**.



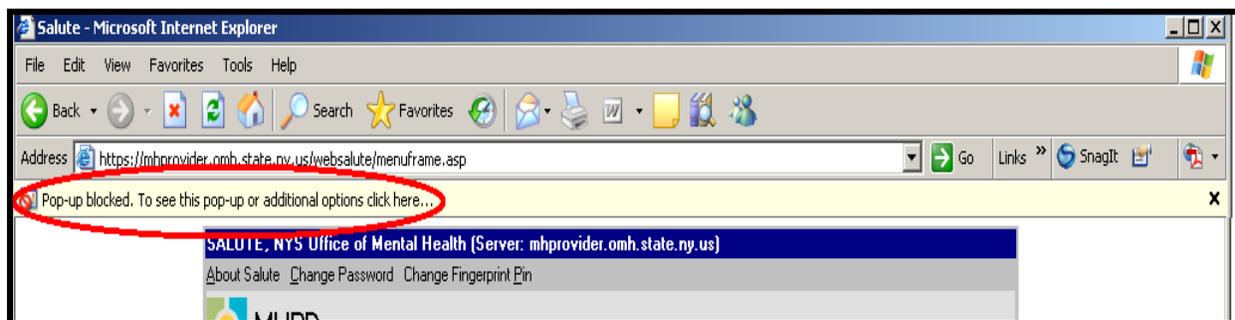
Under “Open links from other programs in,” click “A new window”. Click **OK**, then **Apply**.



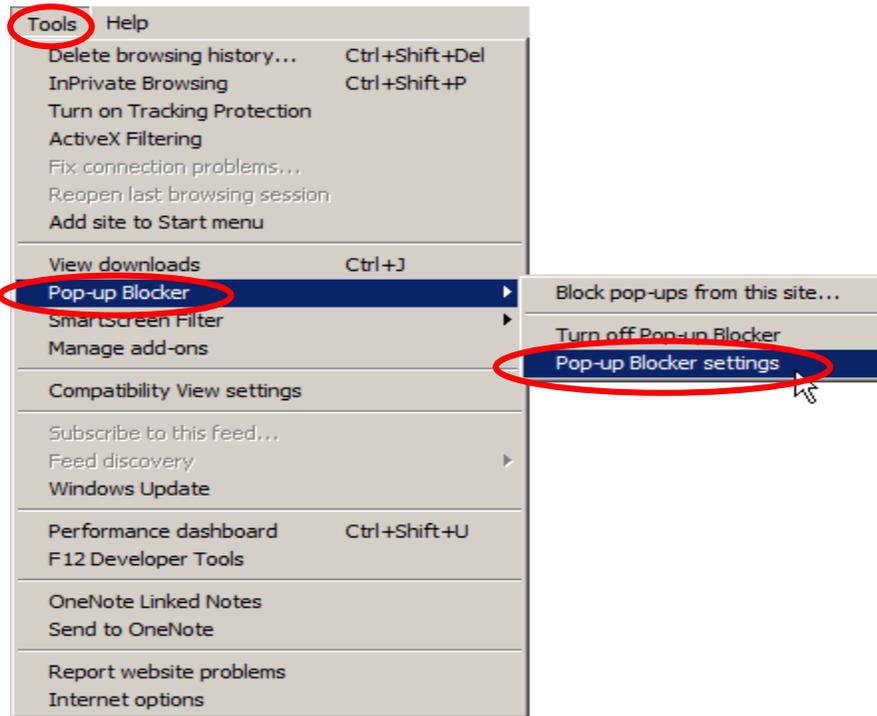
♪ **Note:** The above information works properly in Web Salute and does not work consistently in Desktop Salute.

Turning Off Pop Up Blockers in Internet Explorer

A user may have issues accessing MHPD due to their pop-up blockers being turned on.



You can configure Internet Explorer to allow pop-ups as described below. Select **“Tools,”** point to **“Pop-up Blocker”** and select **“Pop-up Blocker Settings...”**



Compatibility View Settings

If a user clicks on **Yes** in the verify contact information when signing in, and nothing happens, the user is operating an updated version of Internet Explorer and must run MHPD in Compatibility Mode.

Verify Contact Information

Contact Information for

NOTE:
For security reasons, OMH asks that you verify email address 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 request the OMH Helpdesk to place your corrections in the Novell queue. If your email address is missing, you will not be allowed to continue, and MUST contact the OMH Helpdesk in order to proceed.

Contact Information:

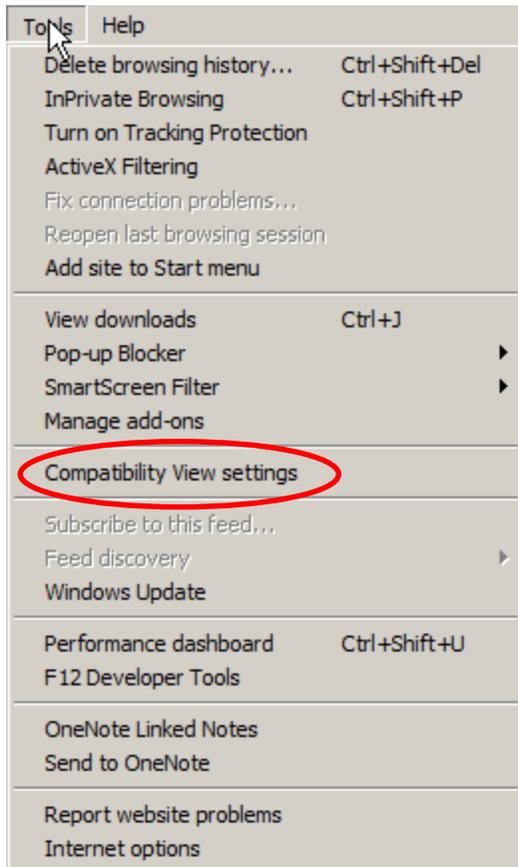
User Id:
User Name:
Email Address:

Yes
No

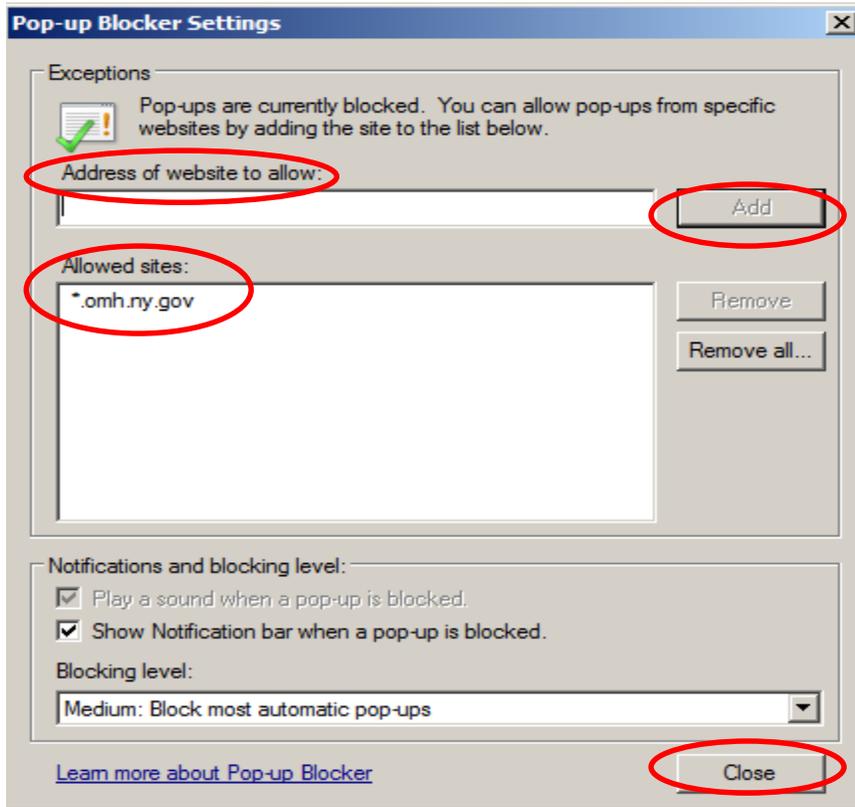
To run MHPD in Compatibility Mode, the user will click **Tools** in the upper left hand corner of the screen, as shown in the toolbar below:



Click **Compatibility View Settings**.



As shown in the screenshot below, enter “*.omh.ny.gov” in the “Address of website to allow” field and click “Add.” This will add “*.omh.ny.gov” to the “Allowed sites” list. Click “Close.”



The User will now be able to click “Yes” in the gold box verifying the User’s Contact Information. Once the Contact Information is verified, the User is brought to the Directory Search page.

Directory Search

Search Criteria

Search for: that: the following:

Program Type:

Program County:

Display:

OMH Licensed Programs and Sites are prefixed with *.

When a User Leaves Your Employ

It is recommended that when a MHPD user leaves your employ, their MHPD access be removed or deactivated. Deactivating a user and removing access for a staff member is done by the Security Manager at each facility, and the task is completed in the Security Management System. It is recommended that each Security Manager regularly update the User List for their facility. This action can only be performed by the Security Manager at each facility. In addition, the MHPD Provider Administrator should uncheck Email Contact if it is currently checked and should designate a replacement to receive change request notifications.

[Return to MHPD Manuals](#)