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Return to MHPD Home Page
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 at (800) 435-7697 and select option #2 or send an email message to: Fixit@its.ny.gov for information about MHPD 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

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 or token. Both of these requirements can be met by having the Security Manager at your facility enter your information into the Security Management System. The Security Manager at your facility is the only person who grants access to MHPD.

**NOTE:** Once you have been given MHPD access or had your access updated, you must wait one hour before trying to access MHPD so that the SMS and MHPD databases can update.

If you need assistance locating your Security Manager, check with your Facility Director or call the OMH Help Desk at (800) 435-7697 and press #2.

**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/](http://omh.ny.gov/). Click on the Behavioral Health Providers tab.

![MHPD screenshot](image)
Scroll down and click on the Mental Health Provider Data Exchange (MHPD) link listed under Behavioral Health Resources & Tools.
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)**

**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 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.

- [Changing Access to MHPD with the Security Administrator (SUA)]
- [MHPD (Restricted - User ID and Password Required)]
- [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 Surveillance & Surveys Unit.

**MHPD can only be accessed using Internet Explorer.**
Click on “Agree” in the Statement of Access and Confidentiality.

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:** If a user has been assigned a token for another database, it can be used in the place of a password 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 appear, click the continue button.

As NYS OMH has upgraded to software-based RSA SecurID tokens, we will request the individual provide their current e-mail address. A new token and instructions will be e-mailed to this address several weeks prior to expiration, to allow for installation of the RSA software on either the individual’s workstation or smartphone and transition to the new token.

If the individual’s work environment cannot support this updated token, a traditional hardware token can be requested and the individual will be prompted for accurate postal address information.

From this entry, NYS OMH will distribute the updated SecurID token. Security Managers can also update user contact information through the OMH Security Management System (SMS).
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 and proceed to the MHPD screen.

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.

Page Banner

Every MHPD web page displays a standard banner section with a gold toolbar.

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.

New Provider

The New Provider tab is new to the MHPD gold toolbar. More information will be added once it becomes available.
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.”

Directory Search page

The search result 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:

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

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

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 display “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.

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.”

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.
As shown below, a separate web page appears with a link to the Change Request Manual under the Amendments to MHPD information header.

**Mental Health Provider Data Exchange (MHPD)**

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 changing 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 Rehabilitation 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 Surveillance & Surveys Unit.

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**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.
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.
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 in 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.

NOTE: While the Edit Facility Contact page is accessible by clicking the edit button (pencil icon shown above), it is recommended that you use the view button (glasses icon) instead. Clicking the edit icon opens an unnecessary Change Request. If you use the edit icon to edit your facility contacts, you have to click the close without submitting tab in the gold box in the upper right corner before exiting so a change request is not generated.
The Edit Facility Contacts page can be found on the View Agency/Facility page by clicking on the link at the bottom of the page as shown below.

<table>
<thead>
<tr>
<th>#</th>
<th>Contact Name</th>
<th>Email</th>
<th>Phone</th>
<th>Off Hours Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Aaa123, Aaa1</td>
<td><a href="mailto:aaaa@aa.com">aaaa@aa.com</a></td>
<td>(518) 474-1234</td>
<td>(518) 474-1234</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Bbobb, Aaaa</td>
<td><a href="mailto:esdf@esdf.com">esdf@esdf.com</a></td>
<td>(518) 555-1212</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Blaehha, Asdf1</td>
<td><a href="mailto:esdf@esdf.com">esdf@esdf.com</a></td>
<td>(123) 455-7890</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Doe, John</td>
<td><a href="mailto:john.doe@omh.ny.gov">john.doe@omh.ny.gov</a></td>
<td>(518) 123-4567 x 89</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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.

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.
Editing a Facility Contact

To edit a facility contact, click on the Edit Facility contacts link located at the bottom of View Agency/Facility page under the Facility Contacts section.

Clicking the Edit Facility Contacts link displays the facility contacts page. To edit a contact listed, click on the pencil icon 🖋.
The contact information can be updated on the Edit Facility Contact page as shown in the screenshot below. 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.
Delete a Facility Contact

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

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.
Hide and Display Sections of the Page

You can 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.
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.

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
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, if 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. 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.

<table>
<thead>
<tr>
<th>Capacity</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beds</td>
<td>3</td>
</tr>
<tr>
<td>Vital Beds</td>
<td>3</td>
</tr>
<tr>
<td>Personal Care Beds</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Information</th>
<th>Family Care Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>(315) 213-5889</td>
</tr>
</tbody>
</table>

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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.

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.
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.
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.

EZ PARs

Information for completing applications for projects that fall under EZ PAR 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.

Comprehensive PARS

A tab entitled Comprehensive PARS was added to MHPD. Information can be found at the following link: https://www.omh.ny.gov/omhweb/par/.

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.
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.

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.

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.
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 displayed. To edit the user, select the pencil icon to the far right of the user’s name.

This will bring up the “Edit MHPD User” screen. More specific details regarding change requests are mentioned on the next page. Once edits have been made, click Update to save the information and Return to navigate away from the Edit MHPD User screen.
Can Submit Facility CRs

The following list of users have access or the ability to submit Facility level change requests: Provider Admin, County Admin or Field Office Admin. 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

The following list of users have access or the ability to submit program level change requests: Provider User, Provider Admin, County User, County Admin, Field Office User, and Field Office Admin.

NOTE: A User with Provider User or Provider Admin access must be sure the boxes are checked in MHPD User Maintenance as shown 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

By clicking the box next to Email Contact (as shown in the screenshot below), 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.
Rate Change Reviewer

By clicking the box next to Rate Change Reviewer (as seen in the screenshot on the next page), 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:

![Message from webpage]

For program type definitions, please choose APPENDIX F from the CBR Manual Index page, http://www.omh.ny.gov/omhweb/cbr/

Clicking 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]

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. You will find this Basic User Manual, plus Amendments to MHPD Information, Surveys, and Contact Us information.

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 Tabs next to “Change how webpages are displayed in 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 (as seen below).
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…”
To allow Internet Explorer to display OMH sites, type "*omh.ny.gov" in the "Address of website to allow" box. Click the add tab, and the "*omh.ny.gov" is displayed in the "Allowed sites" box. Click close.
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.

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:

![Toolbar with Tools option highlighted]

Click Compatibility View Settings.
As shown in the screenshot below, enter “ny.gov” in the “Add this website” box and click “Add.” This will add “ny.gov” to the “Websites you’ve added to Compatibility View” 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.
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