



Office of Addiction Services and Supports

Instructions for Changing Contact Information for OASAS

Forward questions to:
DataMgmt@OASAS.NY.GOV

General Information about Contact Roles in the Provider Directory System

Providers are responsible for maintaining their contact information, which includes contact names, e-mail addresses, and phone numbers, to ensure that it is up to date. Providers are strongly encouraged to update their contact information in the Provider Directory System as staff changes are made. This will ensure that you receive communications from OASAS as well as providing current contact names and phone numbers to prospective clients.

If your contact information is not correct in the Provider Directory System, then OASAS and the HOPEline will also have incorrect information. The HOPEline contractor does not have the ability to update provider information or services provided.

OASAS has added several new contact roles in recent years to address getting information out to the most appropriate provider staff based on topic area. These instructions include a brief description of each.

Please be aware that removing a contact in the PDS DOES NOT remove the individual's access to data via OASAS Applications site. To remove access, please contact the Helpdesk at 518-485-2379.

Contact Type/Roles (continued)

<p>• Chief Executive Officer</p>	<p><u>Required entry</u> at the provider level. The person who would receive communication from OASAS regarding Operating Certificates, regulations, communication from the OASAS Commissioner, and other vital information.</p>
<p>• Chief Operating Officer</p>	<p>COO is entered at the provider level.</p>
<p>• Alternate Contact</p>	<p>Additional contact person at the provider or program level. Alternate Contacts receive communications from the OASAS Commissioner, ListServ, and information regarding Client Data System reporting and/or performance.</p>
<p>• Data Coordinator</p>	<p>The contact person for communications related to data and reporting to OASAS.</p>
<p>• Program Director/Program Contact</p>	<p><u>Required entry</u> at the program level. The Program Director is usually the person responsible for day-to-day operations on-site. OASAS uses the Program Director/Program Contact type to communicate all information related to regulations, Client Data System reporting, certification, and other important communications. In addition, OASAS uses this contact type in the Provider Directory on the OASAS Web Pages.</p>
<p>• Admission Contact</p>	<p>Each program should identify at least one Admission Contact at the program level. There is no restriction on the number of Admission Contacts per program. The HOPEline uses this contact type to provide information to prospective patients and other callers. The Admission Contact is also listed as a data item on the PPSI Report. Up to two Admission Contacts are shown for each program on the PPSI.</p>
<p>• Quality Improvement Director</p>	<p>A Quality Improvement Director at either the provider or program level should be entered if one or more programs identify that a QI Director is in place on the Program Profile and Services Inventory.</p>

Contact Type/Roles (continued)

<ul style="list-style-type: none"> • Healthcare Coordinator 	<p><u>Required entry</u> at the program level. Per Local Services Bulletin 2019-03, each "program/service" must have a qualified individual designated as the Health Coordinator to assure the provision of education, risk reduction, counseling and referral services to all patients regarding HIV/AIDS, tuberculosis, hepatitis, sexually transmitted diseases, and other communicable diseases.</p>
<ul style="list-style-type: none"> • Intake Coordinator 	<p>The person who would be contacted regarding intake information. This contact type can be entered at either the provider or program level.</p>
<ul style="list-style-type: none"> • Prevention Contact 	<p>The contact person for prevention programs. This contact type can be entered at either the provider or program level.</p>
<ul style="list-style-type: none"> • Proxy Contact 	<p>This contact type is only to be added should the CEO not wish to receive e-mails. If this is the case, indicate a "Y" in the Proxy e-mail for the CEO and add a Proxy Contact person. The Proxy, rather than the CEO, would receive communication from OASAS.</p>
<ul style="list-style-type: none"> • STAR-QI Contact 	<p>The person that would receive information regarding STAR-QI if enrolled in that program.</p>
<ul style="list-style-type: none"> • DWI Contact 	<p>If approved as a DWI provider, DWI Contact will be listed in the Provider Directory System and can be entered as a contact type if the program has a valid OASAS Operating Certificate.</p>
<ul style="list-style-type: none"> • Financial Officer 	<p>The financial officer for the provider.</p>
<ul style="list-style-type: none"> • Medical Director 	<p><u>Each provider is required to identify a Medical Director.</u> The e-mail addresses are added to a ListServ for weekly medical information.</p>
<ul style="list-style-type: none"> • Addiction Physician 	<p>Programs may identify a physician who is not the Medical Director to receive weekly medical information via ListServ.</p>

Contact Type/Roles (Continued)

<ul style="list-style-type: none">• <i>Emergency Manager</i>	The person responsible for coordinating all aspects of the emergency management process: preparedness, mitigation, response, and recovery. An Emergency Manager should be identified for EACH certified treatment program.
<ul style="list-style-type: none">• <i>Chair of the Board</i>	<u>Required entry</u> at the provider level for all certified and/or funded providers. The chair person is the head of the board of directors.
<ul style="list-style-type: none">• <i>Compliance Office</i>	This contact should identify the individual within the provider that is responsible for monitoring compliance with all applicable laws, rules, policies, and procedures.

Accessing the Provider Directory System (PDS)

You must have a valid OASAS User ID and password to gain access to the Provider Directory System. If you have not logged in for 90 days, a password reset is necessary from the OASAS Help Desk. Additionally, if you have an OASAS User ID and have not logged in for more than 400 days, your account is disabled, and you must request a new account.

If a User ID is needed, go to [OASAS Applications Homepage](#) and click on the fillable [OASAS External User Access Request](#) and follow the instructions on page two of the IRM-15 form for submitting the request. Inquiries about User IDs and passwords should be directed to the OASAS Help Desk only.

The OASAS Help Desk phone number is (518) 485-2379.

Accessing the Provider Directory System to make changes

From the Web address <https://apps.oasas.ny.gov> , log in using your OASAS User ID and password, then click on the “**Applications**” tab (#1), and select **Provider Directory System** from the blue tab line across the top (#2) and then **Provider Maintenance** (#3). (Note: Your computer must allow pop-ups. Disable pop-up blocker if necessary.)

The screenshot shows a web browser window displaying the OASAS Provider Directory System. The browser address bar shows the URL http://oasasapps.oasas.state.ny.us/portal/page/portal/OASAS_APPS/Applications:ProviderDirectorySystem. The page header includes "New York State" and "State Agencies". The main navigation bar contains several tabs: "Home", "Applications", "Client Data System", "Gambling", "Provider Directory System", "Monthly Service Delivery", "IPMES/Workscope", "Impaired Driver System", and "Help". A yellow box labeled "1" points to the "Applications" tab. Below the navigation bar, a yellow box labeled "2" points to the "Provider Directory System" tab. The main content area is divided into three sections: "Provider Directory System Maintenance", "Provider Directory System Maintenance Inquiry", and "Provider Directory System Reports". In the "Provider Directory System Maintenance" section, a yellow box labeled "3" points to the "Provider Maintenance" link. Other links in this section include "Program Maintenance", "Site Maintenance", and "PPSI Online Form (PAS 7)". The "Provider Directory System Maintenance Inquiry" section contains links for "Provider Maintenance Inquiry", "Program Maintenance Inquiry", "Site Maintenance Inquiry", and "PPSI Online Form (PAS 7) Inquiry". The "Provider Directory System Reports" section contains links for "PPSI (PAS7) Report", "Provider Directory", and "Generate Labels". A footer note states: "Changes made here do not constitute notification to OASAS as required in regulation. If regulations require notification, you must submit that notification using the proscribed process."

Provider Maintenance

1. Enter Provider No. ONLY.
2. Click “Find” button.

OASAS
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Close Application

Provider | Site | Program | PPSI (PAS-7) | Additional Locations

Search Provider

Provider No : **1** | Provider Name :

County : | City :

Find

2

Provider | Site | Program | PPSI (PAS-7) | Additional Locations | Close Application

Do not fill in Provider Name, County or City. Doing so will create an error message that says “Inquiry caused no rows to be retrieved.”

Performing a Search

It is strongly advised that you have your provider number available rather than performing a search. If the number is not available, you may search following the instructions below.



Provider Site Program PPSI (PAS-7) Additional Locations

Search Provider

Provider No :
County :

Provider Name : 



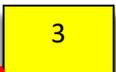
Find

Search

You can use % as wildcard in the search items below, for example "%search text%"

Provider No Provider Name

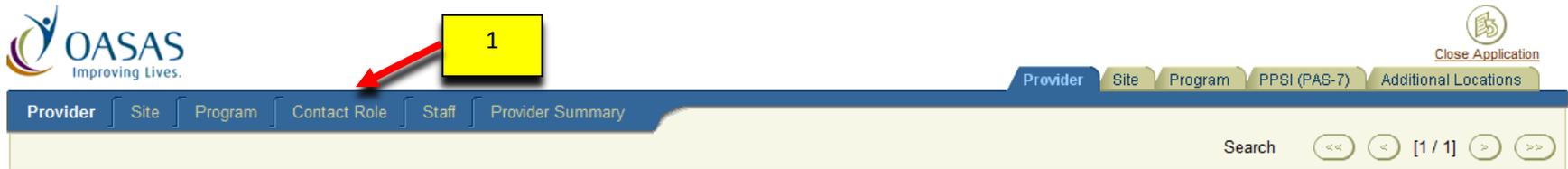
Search



1. Click flashlight icon.
2. Type in one or more words of the provider's legal name. It is recommended that you use the % sign before and after as a wildcard. In this example, the word Center is used, however, depending on how the name was entered into the OASAS database, Center could also be Ctr or some other abbreviation.
3. Click "Search"

Making Changes

Once you open the Edit Provider window, you may begin making changes to provider and contact information. Items you can change are provider web site, contacts, and mailing address (only). Individual program/site addresses are maintained by OASAS and based upon the most recent Operating Certificate. If you find your site address is incorrect, please notify your OASAS Program Manager and ask that they contact Albany to make any necessary corrections. (Note: the “Site” tab is used primarily by OASAS and contains current as well as historical data. It is not a tab that providers need to be concerned with)



Edit Provider

To begin editing your contacts, click the “Contact Role” tab on the blue tab line (#1). The Contact Role screen allows for users to sort by any of the headings. If you want to see the contacts for just your program/site, then you would click the “Program” heading (#2). They will be sorted numerically in ascending order. Click twice and they will sort in descending order. The Contact may be changed to another person by clicking the dropdown menu (small arrow to right of each name). If you do not see the name you want listed, you must add a New Staff.

Contact Role

Provider No : 99998

Provider Name : Brighter Tomorrows, Inc.

Show All

Hide All

A 10-digit phone number must be entered for the Chief Executive Officer and any Pgm Director/P
Click on 'Show' to view or change the Fax or other details for a Contact Role.

Details	Contact Type	Contact	Program	Phone	Extension	Active?	Email
Show	* Pgm Director/Pgm Contact	* Black, Brady	139 - Brighter Tomorrows-CD Inpatient Rehab	5188675309		* Y	
Show	* Pgm Director/Pgm Contact	* Brown, Leroy	126 - Brighter Tomorrows-CD OP Clinic	5188675309	456	* Y	Lbrown@brightertomorrows.com
Show	* Pgm Director/Pgm Contact	* Collins, Angelique	61901 - Brighter Tomorrow's /Sr Boys Res - OP	5188675309		* Y	Acollins@brightertomorrows.com

(Brighter Tomorrows, Inc. is not a real program and contacts shown are fictitious.)

Contact Role Changes

You can make changes directly in the Contact Role tab as long as the dropdown menu includes the name(s) of the people you need to work with. Changes, such as switching two Program Directors between programs can be done at once by simply selecting the correct name from the dropdown menus.

It is important to review and correct phone numbers and e-mail addresses, especially as staff changes are made to the Contacts. There are many instances of John Smith with Jane Doe's e-mail and vice versa. This makes it difficult for prospective clients, callers, OASAS and HOPEline staff to reach the appropriate contact at your agency.

It is not necessary to click "Save" upon each individual correction. You can make all your changes at once and then click "Save" to complete the transaction. In some instances, a specific order must be followed for saving. If making simple name changes to both CEO and Program Director from existing names, it is best to save the CEO first and then continue on making the rest of the changes you need separately from the CEO.

Occasionally, you may receive an error message that says someone is already active in a role. If you need assistance with any error messages, please contact the Treatment Data Management Unit (DataMgmt@OASAS.ny.gov).

Adding New Staff

In this example, we want to replace Angelique Collins at Program #61901 with Theresa Rosa. Theresa does not appear on the dropdown menu of current contacts from the Contact Role screen, so we will need to add her as staff first. Since Theresa is also a new Program Director, adding her can be a little tricky. Please follow these directions exactly. Next, click the “Staff” tab on the blue tab line (#1).

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Close Application

Additional Locations

Provider Site Program PPSI (PAS-7)

Provider Summary

Search << < [1 / 1] > >>

Contact Role

Provider No : 99998 Show All

Provider Name : Brighter Tomorrows, Inc. Hide All

A 10-digit phone number must be entered for the Chief Executive Officer and any Pgm Director/Pgm Contact. Click on 'Show' to view or change the Fax or other details for a Contact Role.

Details	Contact Type	Contact	Program	Phone	Extension	Active?	Email
Show	* Pgm Director/Pgm Contact	* Black, Brady	139 - Brighter Tomorrows-CD Inpatient Rehab	5188675309		* Y	
Show	* Pgm Director/Pgm Contact	* Brown, Leroy	126 - Brighter Tomorrows-CD OP Clinic	5188675309	150	* Y	Lbrown@brightertomorrows.com
Show	* Pgm Director/Pgm Contact	* Collins, Angelique	61901 - Brighter Tomorrow's /Sr Boys Res - OP	5188675309		* Y	Acollins@brightertomorrows.com

Note: As you can see from the example above, Brady Black’s Email is missing. Email has become a very efficient, cost effective means of communication . It is important email addresses are kept up-to-date at all times.

Adding New Staff (continued)

Scroll down, at the bottom left click “New Contact Person.” This will open a new screen where you will enter the information for staff who is not already listed. We will be adding Theresa Rosa as a new Program Director.



Save New Contact Person Details

All information should be complete. The tricky part is that you must indicate that Theresa is not active. Choose “N” for the Active? Column for now (see # 2). Click Save to save the record (#3). (see page 15 for Alternative Method for adding CEO/Program Contact)

Provider No : 99998 Provider Name : Brighter Tomorrows, Inc.

Prefix : Ms. * First Name : Theresa Middle Initial : * Last Name : Rosa

Suffix 1 : CASAC Suffix 2 : MSW Title : Program Director

Show All Hide All

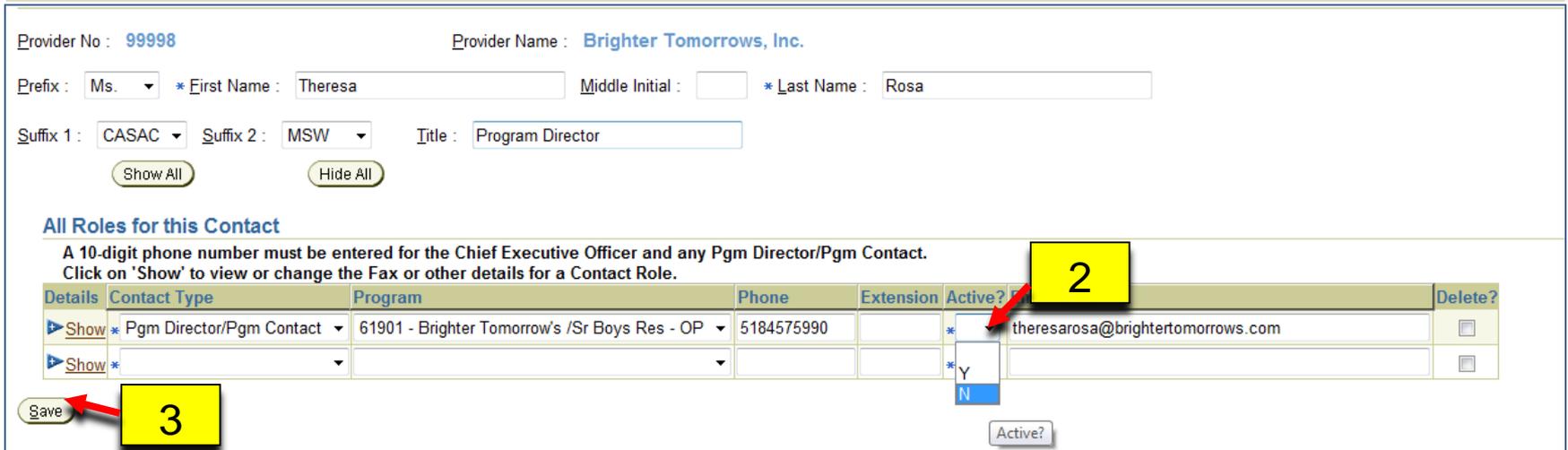
All Roles for this Contact

A 10-digit phone number must be entered for the Chief Executive Officer and any Pgm Director/Pgm Contact.
Click on 'Show' to view or change the Fax or other details for a Contact Role.

Details	Contact Type	Program	Phone	Extension	Active?	Delete?
Show	* Pgm Director/Pgm Contact	61901 - Brighter Tomorrow's /Sr Boys Res - OP	5184575990		* N	<input type="checkbox"/>
Show	*				* Y	<input type="checkbox"/>

Save

Active?



SUCCESS!

Contact Role

Information

: JHS-00100: Transaction completed successfully!

Adding New Staff (continued)

If the staff being added is in any role other than CEO or Program Director/Program Contact, the Contact Type(s) can be added and saved as Active directly from the New Staff Contact screen. In the example below, we added Robinson Burke in two different contact roles. Note that Mr. Burke is the Medical Director for all of Brighter Tomorrows, therefore, no Program was indicated. He is the Healthcare Coordinator for 61901 only so the program was indicated. Email addresses are needed in both rows even though it is the same e-mail. These Contact Types may be saved as Active and no further action is necessary. If you click back on Contact Role, you will see

Provider | Site | Program | Contact Role | **Staff** | Provider Summary

[Summary](#) > [Details](#)

Provider No : **99998** Provider Name : **Brighter Tomorrows, Inc.**

Prefix : * First Name : Middle Initial : * Last Name :

Suffix 1 : Suffix 2 : Title :

All Roles for this Contact

A 10-digit phone number must be entered for the Chief Executive Officer and any Pgm Director/Pgm Contact.
Click on 'Show' to view or change the Fax or other details for a Contact Role.

Details	Contact Type	Program	Phone	Extension	Active?	Email	Delete?
▶ Show	* Healthcare Coordinator	61901 - Brighter Tomorrow's /Sr Boys Res - OP	5184579555	25	* Y	RBurke@brightertomorrows.com	<input type="checkbox"/>
▶ Show	* Medical Director		5184579555	25	* Y	RBurke@brightertomorrows.com	<input type="checkbox"/>

Changing a CEO or Program Director Role

Because of the need to always maintain an active CEO and Program Director at all times, the contact update for these roles is more complicated than the others. We added Theresa Rosa as Program Director but indicated she was not active. The next step will be to go back to the Contact Role tab to finalize the change. Click the “Contact Role” tab on the blue tab line (#1) . Sort column “Program” (#2) and find 61901. Make Angelique Collins’ “Active?” status N and check the Delete box to the right. Make Theresa Rosa’s “Active?” status Y (#3), scroll to the bottom and click “Save.” If you refresh the page after saving, you will see that Angelique Collins is gone.

1

2

3

Provider Site Program **Contact Role** Staff Provider Summary

Contact Role

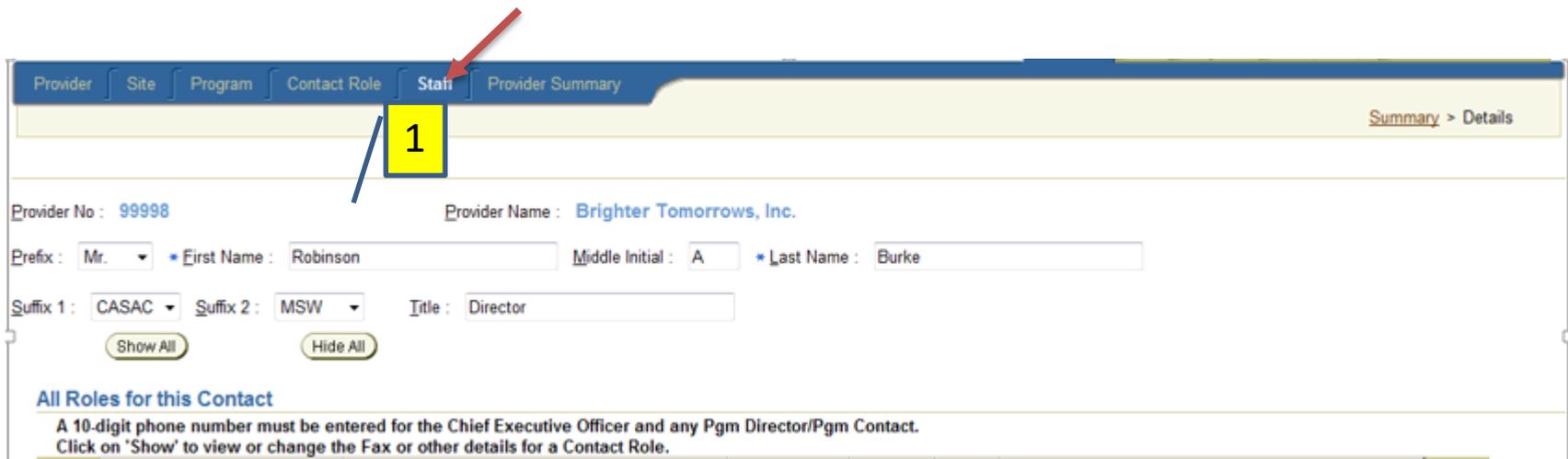
Provider No : 99998 [Show All](#) Provider Name : Brighter Tomorrows, Inc. [Hide All](#)

A 10-digit phone number must be entered for the Chief Executive Officer and any Pgm Director/Pgm Contact. Click on 'Show' to view or change the Fax or other details for a Contact Role.

Details	Contact Type	Contact	Program	Phone	Extension	Active?	Email	Delete?
Show	* Pgm Director/Pgm Contact	* Collins, Angelique	61901 - Brighter Tomorrow's /Sr Boys Res - OP	5188675309		* N	Acollins@brightertomorrows.com	<input checked="" type="checkbox"/>
Show	* Pgm Director/Pgm Contact	* Rosa, Theresa	61901 - Brighter Tomorrow's /Sr Boys Res - OP	5184575990		* Y	theresarosa@brightertomorrows.com	<input type="checkbox"/>

Changing a CEO or Program Director Role (continued)

An alternate way to update the CEO or Program Director Role: Enter the name for the new CEO and/or Program Director/Contact on the Enter New Staff Member page without any roles, clicking Save (1 below). The change of name for these roles can then be made on the Contact Role page by using the dropdown menu for staff name (2-next page) for the appropriate contact, CEO and/or Program Director/Contact. This would change the name from the former CEO and/or Program Director/Contact to current CEO and/or Program Director/Contact. Be sure to update phone number and email address (3-next page) as appropriate and then click Save.



The screenshot shows a web application interface with a navigation menu at the top. The menu items are: Provider, Site, Program, Contact Role, **Staff**, and Provider Summary. The 'Staff' item is highlighted in blue, and a red arrow points to it. A yellow box with the number '1' is placed over the 'Staff' item, with a blue line pointing to it. Below the navigation menu, there is a header area with 'Summary > Details' on the right. The main content area contains the following fields:

- Provider No : 99998
- Provider Name : Brighter Tomorrows, Inc.
- Prefix : Mr. (dropdown)
- * First Name : Robinson
- Middle Initial : A
- * Last Name : Burke
- Suffix 1 : CASAC (dropdown)
- Suffix 2 : MSW (dropdown)
- Title : Director

Below the fields are two buttons: 'Show All' and 'Hide All'. At the bottom, there is a section titled 'All Roles for this Contact' with a note: 'A 10-digit phone number must be entered for the Chief Executive Officer and any Pgm Director/Pgm Contact. Click on 'Show' to view or change the Fax or other details for a Contact Role.'

Changing a CEO or Program Director Role (continued)

Provider Site Program **Contact Role** Staff Provider Summary

Contact Role

Provider No : 99998

Provider Name: Brighter Tomorrows, Inc.

Show All

Hide All

2

3

A 10-digit phone number must be entered for the Chief Executive Officer and any Pgm Director/Pgm Contact. Click on 'Show' to view or change the Fax or other details for a Contact Role.

Details	Contact Type	Contact	Program	Phone	Extension	Active?	Email	Delete?
Show	* Pgm Director/Pgm Contact	* Collins, Angelique	61901 - Brighter Tomorrow's /Sr Boys Res - OP	5188675309		* N	Acollins@brightertomorrows.com	<input checked="" type="checkbox"/>
Show	* Pgm Director/Pgm Contact	* Rosa, Theresa	61901 - Brighter Tomorrow's /Sr Boys Res - OP	5184575990		* Y	theresarosa@brightertomorrows.com	<input type="checkbox"/>

Reviewing Staff

As you review the staff listed for the provider, you may notice that some staff have “0” roles assigned to them. They may have been removed from the Contact Role but never deleted. If the staff that are listed with no roles are no longer there or should not be listed, they can be cleaned up by checking the “Delete?” box to the right and then click Save.

Contact Staff

Provider No : 99998

Provider Name : Brighter Tomorrows, Inc.

Show All

Hide All

Click on 'Show' to view or change the Suffix or Title for a person.
Click in the 'Select' column next to a name then click on the 'Details' button to view or change the details (including the Contact Roles) for that person.

Select	Details	Prefix	First Name	Middle Initial	Last Name	# of Roles	Delete?
<input type="radio"/>	Show	Mr.	* Giacomo		* Aprile	0	<input type="checkbox"/>
<input type="radio"/>	Show	Mr.	* Brady		* Black	1	<input type="checkbox"/>
<input type="radio"/>	Show	Ms.	* Samantha	J	* Brady	0	<input type="checkbox"/>
<input type="radio"/>	Show	Mr.	* Leroy		* Brown	1	<input type="checkbox"/>

You may also wish to review other data by clicking the blue + flag in the “Details” column. This will display their credentials and title.

Select	Details	Prefix	First Name	Middle Initial	Last Name	# of Roles	Delete?
<input type="radio"/>	Hide	Mr.	* Giacomo		* Aprile	0	<input type="checkbox"/>

Suffix 1 : Suffix 2 : Title :

Troubleshooting

- 1. Inquiry caused no rows to be retrieved** -- You entered too much information in a search box. For example, in addition to the provider number, you also entered a County, City or typed in the Provider Name box. When performing a search, enter the provider and/or program/PRU number ONLY.
- 2. Pgm Director/Pgm Contact (name) must have a 10-digit phone number** -- Phone number is missing or is not 10 digits.
- 3. Error in Contact Role (Role Label): For (name). This Contact Type cannot be assigned to a program** – Contact role is at the provider level and cannot have a program in the Program column.
- 4. When I run my PPSI report, the Admission Contacts I entered do not come out in the order I put them in** -- Unfortunately, this is something OASAS cannot control. The computer system randomly chooses the Admission Contacts.
- 5. Do I have to put in all our counselors and other staff?** -- No. OASAS only wants contact information for the contact roles listed. There would be no reason for OASAS to contact your counselors directly. Most of the correspondence is sent to the CEO, Program Director, Medical Director, or Data Coordinator.
- 6. I'm getting strange error messages with lots of numbers and text that doesn't mean anything** -- If you get an error message that is not clear, you may be trying to do your update during a peak time. When the OASAS server gets extremely busy, it cannot handle the updates. If you get a strange message with lots of numbers or a JBL exception or it starts with the word "Attribute", try to do your update again later. Unfortunately, you may also have lost whatever you put in the system and tried to save.
- 7. My program address is not correct. Where do I change that?** -- In addition to contact information, programs are allowed to edit the administrative, mailing address, and enter a web site address for the provider. Program addresses can only be edited by OASAS staff. If your program has moved and you have a new Operating Certificate, but the address is incorrect, please contact your OASAS Program Manager.

OASAS Contact Information

For password and log-in issues:

OASAS Help Desk (518) 485-2379

For server error messages:

OASAS Help Desk (518) 485-2379

For data entry error messages:

DataMgmt@OASAS.NY.GOV

For clarification on contact roles:

DataMgmt@OASAS.NY.GOV