

# Security Management System



MHPD Module

# Security Management System:

- Why do we need to use SMS?
- Security Management System
  - Accessing SMS
  - MHPD Module
    - Security Groups
- Mental Health Provider Data Exchange
  - Changes to MHPD

# Why SMS?

- The Security Management System puts user access under the control of the Security Manager at your facility, making things more secure.
- The Security Manager can keep OMH updated on user info easily, so we can contact users when needed.
- The Security Manager can reset users passwords.
- OMH is looking to migrate more of its applications into SMS, and allow facilities to more easily and safely assign user access themselves.

# **How to get access to the Security Management System**

Your Facility Director must first sign the CNDA, or Confidentiality and Non-Disclosure Agreement on line .

Email is sent to the Facility Director from the OMH Security Group with the information a Security Manager needs to register for SMS. Contact the Help Desk at 1-800-HELP NYS for further assistance.

# OMH Website

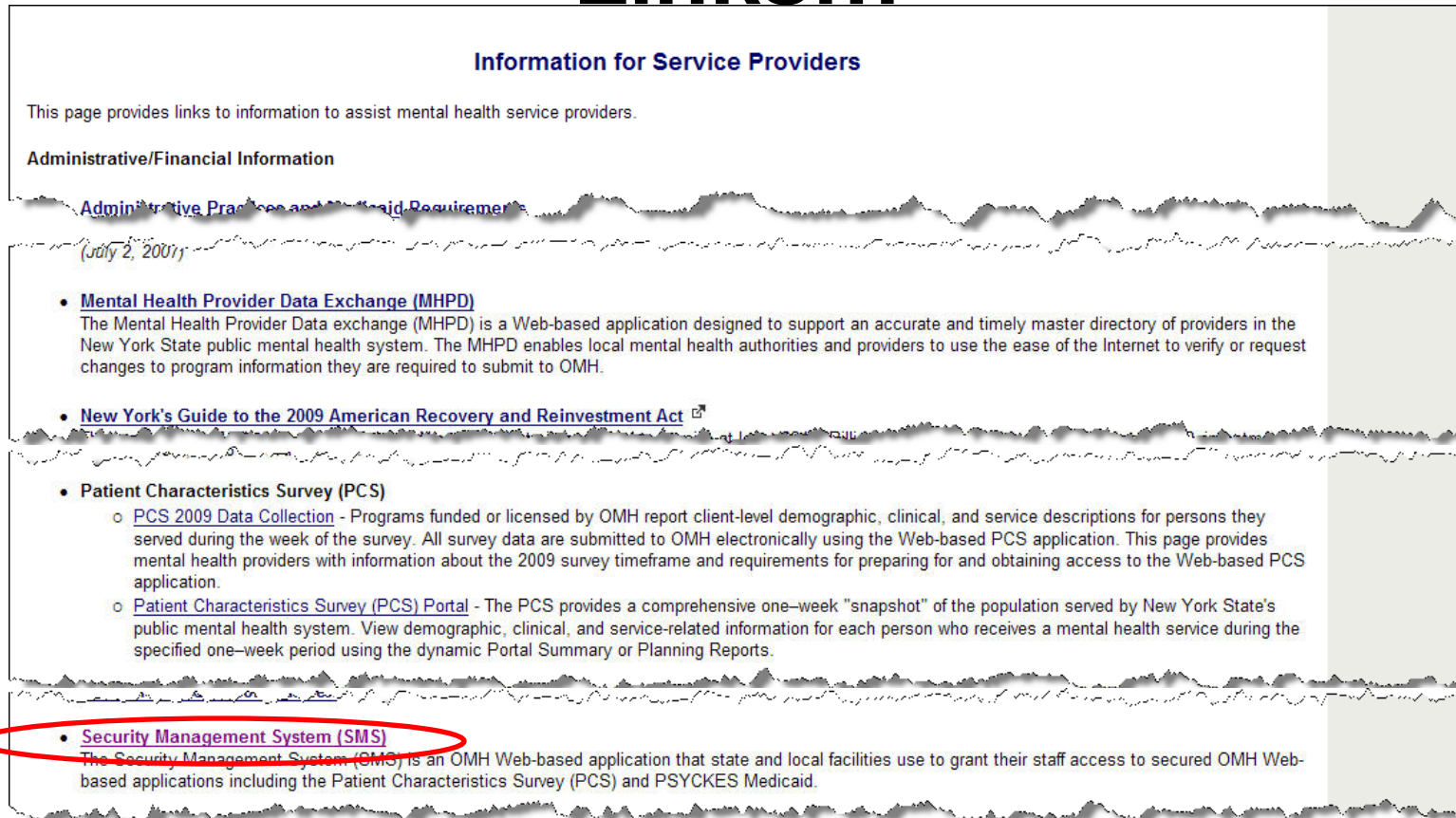
## <http://www.omh.ny.gov>



The screenshot shows the homepage of the New York State Office of Mental Health (OMH). The header includes the New York State logo, the text "State Agencies", and a search bar for "Search all of NY.gov". Below this is the "Office of Mental Health" logo, with the names of Commissioner Michael F. Hogan, PhD and Governor Andrew M. Cuomo. A navigation bar contains links for Home, News, Publications, Resources, Employment, and A-Z Site Map. To the right of the navigation bar are links for "Other Languages" in Arabic, Chinese, Russian, and Spanish. Below the navigation bar is a "Message From Commissioner Hogan" section and a "Highlights" section with a list of links including "About OMH", "Clinic and Ambulatory Restructuring", "Doing Business With OMH", "FAQ", "FMAP Reductions", "Forensics", "Forms", "Guidance Documents", "Mental Health Acronyms", "Mental Health Links", "Office of Consumer Affairs", "OMH Facilities", "PAR Application", "Planning Resources", "PSYCKES", "Regulations", "Statistics & Reports", and "Suicide Prevention". The main content area is titled "Mental Health Resources" and includes a sub-navigation bar with "Resources", "Find a Program", and "Contact OMH". Under "Resources", there is a list of links: "Children, Teens & Families", "Adults", "Geriatrics", "Military Personnel & Families", "Providers" (which is circled in red), and "Government Partners". To the right of this list is a photograph of a smiling couple and a quote: "Promoting the mental health of all New Yorkers with a particular focus on facilitating hope and recovery for adults with serious mental illness and children with serious emotional disturbances." Below the "Mental Health Resources" section is a "What's New?" section with a sub-navigation bar for "News", "OMH Newsletter", "Advisories", "Webcasts", and "Job Openings". Under "News", there is a list of recent news items: "NYSORI Webinars Now Available on OMH Website (January 10, 2011)", "Electronic EZ PAR Application Process to Begin Dec. 15 (December 8, 2010)", "The Joint Commission Finds OMH Performance Exceeds National Norms (December 7, 2010)", and "OMH PAR Webpage Enhanced (November 4, 2010)". A "More News..." link is also present.

The OMH Website has a link to Resources for Providers...

# that includes Many Very Useful Links...




**Information for Service Providers**

This page provides links to information to assist mental health service providers.

**Administrative/Financial Information**

[Administrative Practices and Medicaid Requirements](#)  
(July 2, 2007)

- **Mental Health Provider Data Exchange (MHPD)**  
The Mental Health Provider Data exchange (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.
- **New York's Guide to the 2009 American Recovery and Reinvestment Act** 
- **Patient Characteristics Survey (PCS)**
  - [PCS 2009 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 2009 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 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.

including one to the Security Management System Home Page, where you will find information about SMS, a user manual, and links to the application itself.

# **How to use the Security Management System**

Log on using your User ID and Token

A token is a thumb sized electronic device with a 6 digit number that changes once a minute that functions as a secure password. It will be mailed to you from OMH.

# Once you log in, you will see the SMS User List

The screenshot shows the 'Security Management System [SMS]' interface for the 'Office of Mental Health'. The header includes the 'om' logo, the date 'Tuesday, December 07, 2010', and the user 'Helen Tester'. A navigation bar contains 'Go To', 'Help', 'About', and 'Logout' links. The main section is titled 'Users' and shows a 'User List' with a 'User Count = 3'. Below the list is a 'New User' button. The 'Search Criteria' section includes fields for Agency, Application, User ID, Name (Last and First), and checkboxes for 'Show Deactivated User' and 'Show Security Manager'. 'Clear Search Criteria' and 'Search' buttons are at the bottom.

New York State  
**om** Security Management System [SMS]  
Office of Mental Health Test Facility (for user manual) Helen Tester  
Go To Help About Logout

### Users

**User List:** User Count = 3

Select a userID from the list below to grant the user access to an application. (Currently, PSYCKES, MHPD and PCS are the only applications available.) If an individual is not listed, you can create a userID for him/her by clicking on the "New User" button and completing the "New User" screen.

Note: The list below may not include all OMH userIDs at your agency. In rare circumstances, UserIDs will not be displayed. If you need to grant access to a user missing from the list and you know the individual already has an OMH userID, please click on the "New User" button and then enter the individual's OMH userID on the "New User" screen.

Edit User ID	Name	Token Assigned
2222AM	Adams, Mary	yes
0304JD	Doe, James	no
70520FPB	Jones, Frank	no

[New User](#)

### Search Criteria:

Agency: Test Facility (for user manual)

Application: ---- Any Application ----

User ID:

Name: Last Name:  First Name:

Show Deactivated User ☐

Show Security Manager ☐

[Clear Search Criteria](#) [Search](#)

- Shows all the users at your facility who have OMH User IDs
- Search Criteria allows you to narrow down your user list, making it easier to locate a particular user
- The Help Manual which you can access through the "Help" menu above, has more information







# Assigning MHPD User Access in SMS

**Users**

**User List:** **User Count = 3**

Select a userID from the list below to grant the user access to an application. (Currently, PSYCKES, MHPD and PCS are the only applications available.) If an individual is not listed, you can create a userID for him/her by clicking on the "New User" button and completing the "New User" screen.

Note: The list below may not include all OMH userIDs at your agency. In rare circumstances, UserIDs will not be displayed. If you need to grant access to a user missing from the list and you know the individual already has an OMH userID, please click on the "New User" button and then enter the individual's OMH userID on the "New User" screen.

Edit User ID	Name	Token Assigned
 2222AM	Adams, Mary	yes
 0304JD	Doe, James	no
 70520FPB	Jones, Frank	no
		

Click the pencil icon to edit a User

# Edit User Screen

- Check the box for the correct Group Name, then click “Update”
- Any field with an asterisk is required and must be filled before clicking “Update”

**Edit User**

**User Information:**

User ID: 70520FPB

Name: \* First Name: Frank M.I.: P \* Last Name: Jones

\* Date of Birth: 01/01/1903 \* Gender: Male

\* Title: Director Of I.T.

\* Email: burns@email.com

\* Work Phone #: (518) 555-1000 Ext.:

\* Agency: County Department of Mental Health

SecurID® Token: Not assigned

Last Updated By: Jane Doe on 01/05/2011 04:55:19 PM

[New User](#) [Update](#) [Deactivate](#) [Reset Password](#) [Users](#)

**Mental Health Provider Directory [MHPD]**

Authentication: Password or Token

Groups:

Group Name	Description
<input type="checkbox"/> Provider - User	Can view Facility information and can add or update programs and sites.
<input type="checkbox"/> Provider - Admin	Has all the Provider User functionality and can edit the facility maintenance page and update the facility record.
<input type="checkbox"/> County - User	Has the same functionality as a Provider User for each facility in the county.
<input type="checkbox"/> County - Admin	Has all the County User functionality and can edit the county DMH's Facility maintenance page and update the facility record.

# Selecting the Correct User Access

- **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 add, update or close programs using Change Requests, Administrative Actions and EZ PARs.
- **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, as well as designate Users to complete the Facility and Case Management Surveys. The Provider Admin can also assign persons to receive facility notifications sent out by OMH via email.
- **County User**– A County or New York City Mental Health Department User can search, view and request updates to Facilities in their county, and Programs, and Sites for any Facility (regardless of location) which operate in the county. They can view change requests and can request the opening or closing of existing unlicensed programs in their county. They can view but not submit Administrative Actions and EZ PARs.
- **County Admin** – a User at a county Facility who has the same access as a County User, and has all the functionality of the Provider Admin for the County DMH's facility.

# When Finished with Editing

New York State  
**om**  
Office of Mental Health

Friday, January 14, 2011

**Security Management System [SMS]**

Albany County Department of Mental Health

Jane Doe

Go To Help About Logout

**Edit User**

The user's information has been updated. [Close](#)

**User Information:**

User ID: 70520FPB

Name: \* First Name: Frank M.I.: P \* Last Name: Jones

\* Date of Birth: 01/01/1903 \* Gender: Male

\* Title: Director Of I.T.

\* Email: burns@email.com

\* Work Phone #: (518) 555-1000 Ext.:

\* Agency: Albany County Department of Mental Health

SecurID® Token: Not assigned

Last Updated By: Jane Doe on 01/14/2011 02:26:52 PM

[New User](#) [Update](#) [Deactivate](#) [Reset Password](#) [Users](#)

**Mental Health Provider Directory [MHPD]**

Authentication: Password or Token

Groups:

<input type="checkbox"/>	Group Name	
<input type="checkbox"/>	Provider - User	Can view Facility information and can add or update programs and sites.
<input type="checkbox"/>	Provider - Admin	Has all the Provider User functionality and can edit the facility maintenance page and update the facility record.
<input checked="" type="checkbox"/>	County - User	Has the same functionality as a Provider User for each facility in the county.
<input type="checkbox"/>	County - Admin	Has all the County User functionality and can edit the county DMH's Facility maintenance page and update the facility record.

- Click “Logout” to logout of SMS then close the program

- Click “Close” to return to Edit User screen for this user

- Or

- Click “Users” to return to User List and choose another user

# Changes in Features in MHPD

On logging in, the ***Verify Contact Information Page*** will require ***all*** users to confirm their information.

Security Managers will make necessary corrections to user information in **SMS** by selecting the user from the user list, editing their information, and clicking “Update”.

# When you log in to MHPD...

**Verify Contact Information**

Contact Information for Jane Doe

**NOTE:**

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

The following are Security Managers at your facility.

Security Manager's Name	Email Address	Phone #
Sms Security Manager	chjm@omh.state.ny....	(518)555-1000

**Contact Information:**

User Id: L2222HXS  
User Name: Jane Doe  
Title:  
Email Address: chxs@omh.state.ny.us  
Phone #: (518)555-1000 x \_\_\_\_

[Yes](#)  
[No](#)

- Check your information at the bottom of the screen
- If there are errors, contact your Security Manager, listed here

If no email address is listed, you will not be allowed to proceed into MHPD, you MUST contact your Security Manager first to make corrections

If everything is correct, click "Yes" to continue on into MHPD

**These two features will only be available to County Admins and Provider Admins.**

The ***Edit Agency/Facility Change Request*** allows an Admin to update info for the Facility, CEO and Facility Director.

The ***Maintenance Page*** will allow an Admin to select an MHPD User as the Primary Facility Contact.

# Updating Facility Information

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

[Submit Change Request](#)  
[Close Without Submitting](#)  
Fields prefixed with \* are required.

Agency Information:

Web Site: www.mhpd.testing.com  
Web Site:

Chairperson of the Board:

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

Name:  First Name:  Last Name:  Degree:

Position:

Address:

City, State Zip:

Phone:  x

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

Facility Information:

Facility Name: Test Facility (for user manual)  
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: 8/3/2010 1:40:47 PM

**Name changes for a facility require a request in writing with the submission of the amended Certificate of Incorporation to OMH. This is followed with a copy of the proof of filing with the Secretary of State.**

\*Facility Name:

\*Address:

P. O. Box:

\*City, State Zip:

\*County:

\*Phone:  x

Fax:

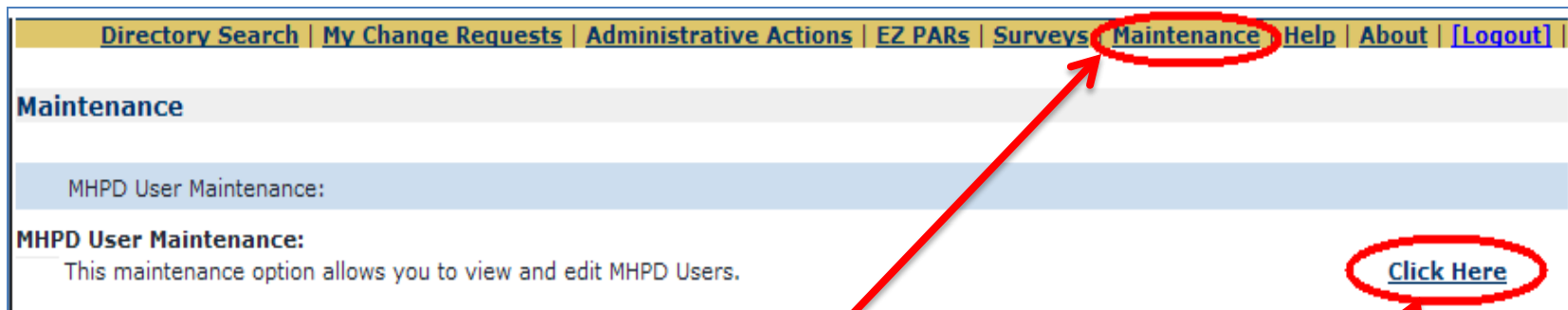
Director:

- The Edit Agency/Facility Change Request can only be submitted by a user with County Admin or Provider Admin status
- This Change Request allows the Admin to update Facility information, address, email, Executive Director name and contact information and so on.
- The Admin should be someone who will keep this information up to date



# Updating the Primary Facility Contact

The Primary Facility Contact is the person at your facility who the County Admin or Provider Admin designates to receive copies of all email notifications sent out by OMH.



Click here to go to the Maintenance page... then click here to go to the MHPD User Maintenance List of Users.

New York State **om** Office of Mental Health

Mental Health Provider Data Exchange (MHPD)

Wednesday, January 12, 2011

User: Jane Doe

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




### MHPD User Maintenance

**Filter Criteria**

User Id:  Facility Code or Name:  Include Inactive Users: ☐ **Filter**

User Name:  Email Address:

[Return to Maintenance](#)

User Id	User Name ▲	Email Address	Phone #	Group Name	Facility	
L2222HXT	Helene Testytester	tchxs@omh.st... (518) 555-1000		Provider - Admin	[2222] Test Facility (for user manual)	
L2222LV	Lulu Von User	tchxs@omh.st... (518) 555-1000		Provider - Admin	[2222] Test Facility (for user manual)	
L2222MYT	Mhpd Test3	tchjm@omh.s... (518) 555-1000		Provider - User	[2222] Test Facility (for user manual)	

- All Users with MHPD access are listed.
- Pick the User you wish to designate as Primary Facility Contact
- Select the Edit Icon to edit a user.

**Edit MHPD User**

MHPD User: [L2222LV] - Lulu Von User

**User Information:**

User Id:	L2222LV
User Name:	Lulu Von User
Title:	Administrative Guru
Email Address:	tchxs@omh.state.ny.us
Phone #:	(518) 555-1000 x ____
Group Name:	Provider - Admin
Facility:	[2222] - Test Facility (for user manual)

**Change Requests:**

Primary Facility Contact: ☐

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

**Click the check box and this User will receive all MHPD notifications. You may only have one Primary Contact. To change your Primary Contact, select a different user and check the box. Selecting a new user will remove the old one from the position of Primary Facility Contact.**

**Click Update to save your selection.**

# Security Management System



MHPD Module

If you have questions, [e-mail us](#).