

# Getting Access to the Mental Health Provider Data Exchange (MHPD) Via the Security Management System (SMS)

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## Mental Health Provider Data Exchange (MHPD) Module

In the Security Management System (SMS), the facility’s Security Manager can add, deactivate, or edit a user’s account information. The Security Manager also assigns a user’s level of access to MHPD. Only a Security Manager will be able to update a user’s name, email address, title, and phone number.

### Assigning MHPD Roles

After a Security Manager adds or edits user account information on the Users Page in SMS, the Security Manager will then grant the user access to MHPD.

For providers or counties, there are four roles in MHPD, each with their own specific levels of access and responsibility:

**Provider User:** User at an individual facility who can access all the information currently available for that facility in MHPD. A user with Provider User access can submit Change Requests, Administrative Actions, and EZ PARs to add, update, or close programs.

**Provider Admin:** 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.

**County User:** County or New York City Mental Health Department User can search, view, and request updates to programs and sites located in the county. They can view change requests and can request the opening or closing of existing unlicensed programs. They can view but cannot submit Administrative Actions and EZ PARs.

**County Admin:** User at a local government unit who has the same access as a County User and has all the functionality of the Provider Admin for the County Department of Mental Health and each facility located in the county.

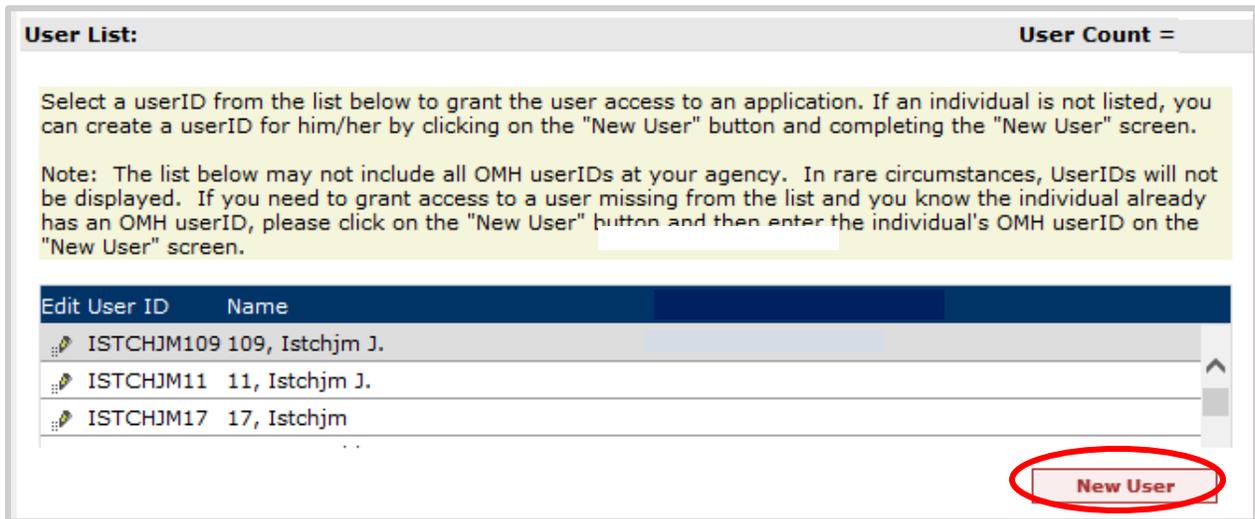
The Security Manager can grant a user only one role, for instance, a user with Provider access cannot also have County access. The Security Manager can grant a user in a Provider role access only to the Security Manager’s facility. If the user needs access to a second facility, the Security Manager for the second facility should go into SMS and add the person as a new user to associate the user with the second facility.

## User List

To assign a user a chosen role in MHPD after logging into SMS, the Security Manager selects the User from the “User List” or creates a New User if the person does not already have a User ID.

## Create New User

To create a New User, the Security Manager clicks the “New User” button and follows the steps indicated.



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

Select a userID from the list below to grant the user access to an application. 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
ISTCHJM109 109	Istchjm J.
ISTCHJM11 11	Istchjm J.
ISTCHJM17 17	Istchjm

**New User**

The Security Manager fills out the information, then scrolls down to the MHPD module to assign MHPD access to a user. Once the User Information is completed and access is assigned, the Security Manager clicks the “Create User” button.

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

### New User

**User Information:**

If the user has an existing OMH User ID, please enter it in the User ID box. If the user does not have an OMH User ID, please leave the User ID box blank. SMS will auto generate a new User ID.

User ID:

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

Date of Birth:  Gender:

Title:

\* Email:

\* Work Phone #:  Ext.:

\* Agency: Test Facility (for user manual)

SecurID® Token: Not assigned

Token Type Needed:  Software Token  Hardware Token

Assurance Level 2: No

**NOTE:** If any of the required fields (marked with asterisks\*) are blank, the Security Manager will be directed to enter information before being allowed to click "Create User."

Clicking the “Create User” tab, brings up the “Edit User” screen instead of the “New User” screen. A note will appear stating the user has been created.

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### Edit User

**The user has been created.** Close

**User Information:**

User ID: L2222TM1

Name: \* First Name: Test M.I.: \* Last Name: Mhpd

Date of Birth: 01/01/1990 Gender: Female

Title:

\* Email: test.mhpd@omh.ny.gov

\* Work Phone #: (518) 555-1212 Ext.:

\* Agency: Test Facility (for user manual)

SecurID® Token: Not assigned

Token Type Needed:  Software Token  Hardware Token

Assurance Level 2: No

Last Updated By:

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

**NOTE:** Once you have been granted 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.

## Edit User

To edit a user, the Security Manager clicks the Edit icon  (the small pencil to the left of the User ID).

### Users

**User List:** **User Count = 171**

Select a userID from the list below to grant the user access to an application. 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
 MHPD_P22222222, Provider P.	
 L2222B2	2name, Bas
 L2222RA	Admin, Rems

This will bring you to the "Edit User" screen. Once in the "Edit User" screen, the Security Manager should first verify the user's information. If any of the required fields (marked with asterisks\*) are blank, the Security Manager will be directed to enter information before being allowed to make any updates. Once edits are completed, clicking on the "Users" button returns you to the list of Users. Information will not be saved if the "Update" button is not selected.


**Security Management System [SMS]**

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Help
About
Logout

### Edit User

**User Information:**

User ID:

Name:  M.I.:  \* Last Name:

Date of Birth:  Gender:

Title:

\* Email:

\* Work Phone #:  Ext.:

\* Agency:

SecurID® Token:

Token Type Needed:  Software Token  Hardware Token

Assurance Level 2:

Last Updated By:

## Assigning MHPD Access

To assign MHPD access, the Security Manager scrolls down to the MHPD module section within the “Edit User” screen and puts a check in the appropriate user role.

**Mental Health Provider Directory [MHPD]**

Authentication: Password or Token

Groups:

Group Name	
<input checked="" 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.

When finished with all edits, click the “Update” button under the “Edit User” Information.

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

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**NOTE:** Information will not be saved if the “Update” button is not selected.

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Once updated, the following screen will appear:

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Go To Help About **Logout**

**Edit User**

**The user's information has been updated.** **Close**

**User Information:**

User ID: L2222SYM

Name: \* First Name: Sms \* Last Name: Mhpd  
M.I.: S

Date of Birth: 01/10/1980 Gender: Male

Title: Title

\* Email: test.mhpd@omh.ny.gov

\* Work Phone #: (518) 555-1212 Ext.:

\* Agency: Test Facility (for user manual)

SecurID® Token: Not assigned

Token Type Needed:  Software Token  Hardware Token

NY Gov ID:

Assurance Level 2: No

Last Updated By:

**New User Update Deactivate Reset Password Users**

On this screen, you may click the “Users” button to return to the User List, click “Close” to return to this Edit User screen, if necessary, or “Logout” at the top right-hand corner of the screen to log out of SMS and close out of the application.

## Keep User Information Updated

Up-to-date phone and email contact information are needed for OMH or county staff reviewing the requests. It is important to keep this information current so that MHPD users receive email notifications of submitted Change Requests, Administrative Actions, and EZ PARs.

## Email Notification

Duplicate notification email is sent to the Security Manager's and user's email addresses whenever a new user is entered in the system and/or a new password is generated and when a user is granted access to an application, such as when an MHPD Group Name is assigned. No email is sent when user information is updated.

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**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.

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If you have any questions or concerns, please feel free to email MHPD Help Desk at [mhpd@omh.ny.gov](mailto:mhpd@omh.ny.gov) or call them at (800) 430-3586.