Mental Health Provider Data Exchange (MHPD) Module

In SMS the facility’s Security Manager can add, deactivate or edit Users, and assign 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.

Assigning MHPD Roles

After a security manager adds or edits a User 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**: 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 EZ PARs to add, update or close programs.

- **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.

- **County User**: a 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**: a 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 in to SMS, the Security Manager next 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.
The Security Manager will fill out the information and scroll down to the MHPD module to assign MHPD access to a user. Once the User Information is filled out and access is assigned, the Security Manager clicks the Create User button.

**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 Create User.
Once the Security Manager clicks the Create User tab, the screen becomes the Edit User screen instead of the New User screen. There will also be a note stating the user has been created.

**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.
Edit User

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

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.
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)](image)

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

**NOTE:** Information will not be saved if the “Update” button is not selected.
Once Updated, the following screen will appear. On this screen, you may click the “Users” button to return to the User List, “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

It is important to keep this information current so that MHPD Users receive email notifications of Change Requests, Administrative Actions and EZ PARs that they submit and so that they may be contacted by phone or email by OMH or county staff who are reviewing the requests.
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.

**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 have any questions of concerns, please feel free to contact mhpd@omh.ny.gov or (800) 430-3586.