SMS: Security Management System

Referenced below are the SMS Information:

- After the self-registration and setting up token is complete, Security Manager will receive email containing following information:
  - URL to SMS application.
  - User ID for SMS application.
- The Security Manager will use SMS application to assign roles in CFRS Web.

Please see the steps below for SMS:

Navigate to [https://sms.omh.ny.gov](https://sms.omh.ny.gov)

The Security Manager must enter User ID and RSA generated Passcode, then click **Continue** button.

SMS application will display Home page. The Security Manager can create new user by selecting **New User** button.

**Special instruction:** If the user being created needs access to multiple agencies, for example the user is a ‘CPA/Fiscal’ user, then ask the user if there is an existing user ID with a different Agency (Primary Agency). If there is an existing user ID, then send an email request to CFR@omh.ny.gov to add this user to your agency by providing the following information:

- Name of the user
- User ID for primary agency
- Your agency code
- CFR Role to be assigned
To add a new user, Security Manager must fill in the required information and select role (Group name) on the “New User” page click **Create User** button. A User id will be automatically assigned for the new user. User will receive emails containing User id and password.

**CFR Provider Agency Reviewer:** Read-only access to all the provider agency’s submitted documents and work in progress. Access to Provider reports function.

**CFR Provider Agency Preparer:** In addition to the same access as Reviewer, can enter data for all submission types, can perform full calculations, can validate submission, and assign Document Control Number.

**CFR Provider Agency Submitter:** In addition to the same access as Preparer, can submit CFRs and CBRs, can upload supporting documents.

To assign CFR role to an existing user (user already has access to another OMH application), from the ‘Users’ page, click on the pencil icon as highlighted in the screenshot.

**Note:** CFRS Web users with roles of Reviewer, Preparer, Submitter do not need a token. These users access the application with username and password.
Click on the **Reset Password** button, then select CFR Role, then click on the **Update** button.

Mandatory fields are indicated by asterisk (*).

**Note:** Password reset is required to ensure that passwords are same across all OMH applications.