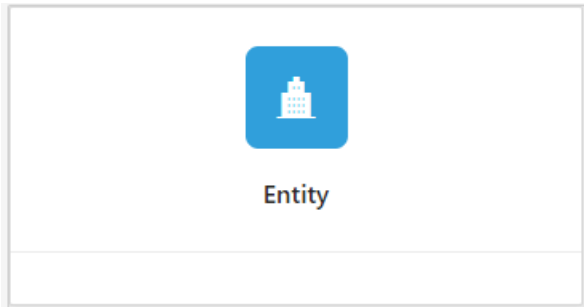


Fiscal Health Monitoring System Entity Tile Functions Job Aid

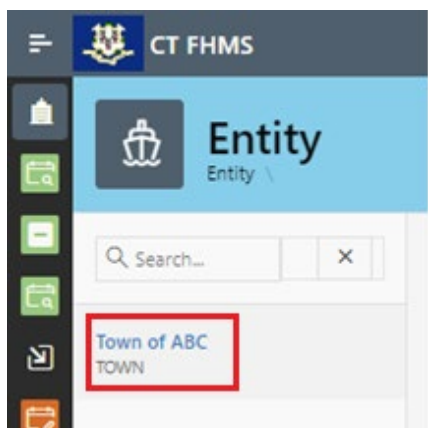


1. At the Main Menu – Select Entity Tile



The Entity page displays

2. Select the Entity (Town or City) on the left side



The Entity Contact page displays

3. Go to the list of Entity Contacts

Entity Contact												
	First Name	Middle Name	Last Name	Title	Status	Primary	Phone	Extension	Mobile	Email	Additional Info	
	John		Smith	Finance Director	Active	Yes	860-999-9999			TESTTEST@TOWNOFABC.GOV		
Report Total:												

**Note: Only a primary user has access to add entity contacts*

Fiscal Health Monitoring System Entity Tile Functions Job Aid



Creating a New User:

1. Click  in the top right-hand corner of the Entity Contact table

The Entity Contact Edit page displays

A screenshot of the "Entity Contact Edit" form. The form is titled "Entity Contact Edit" and has a close button (X) in the top right corner. It contains several input fields: "First Name", "Middle Name", and "Last Name", each with a red asterisk indicating it is a required field. Below these are "Contact Title", "Status" (with radio buttons for "Active" and "In-Active", where "Active" is selected), and "Primary Flag" (with radio buttons for "Yes" and "No", where "No" is selected). There are also fields for "Contact Phone", "Extension", and "Contact Cell", each with a red asterisk. Below these is a "Contact Email" field with a red asterisk and an email icon. A large text area labeled "Additional Info" is also present. At the bottom, there are three sets of radio buttons for permissions: "FHMS Read" (Yes/No, with "Yes" selected), "FHMS Write" (Yes/No, with "No" selected), and "STARS" (Yes/No, with "No" selected). "Cancel" and "Save" buttons are at the bottom.

**Note:* Red markers indicate required fields

2. Enter Information on the form

**Notes:*

- **FHMS Read** – “Yes” gives the contact access to read all data entered in FHMS (The system will default user credentials to FHMS Read only)
- **FHMS Write** – “Yes” gives the contact access to enter data in FHMS (but only the primary user has access to certify the data)
- **STARS** – “Yes” gives the contact access to the STARS database

Fiscal Health Monitoring System Entity Tile Functions Job Aid



3. Click Save

The Entity Contact page displays

Entity Contact is added

4. Find the new contact in the Entity Contact section of the page and scroll to the right

Entity Contact												+
	First Name	Middle Name	Last Name	Title	Status	Primary	Phone	Extension	Mobile	Email	Ad	
	Test		Town	Finance Director	Active	Yes	860-999-9999			TESTTEST@TOWNOFABC.GOV		
	Test		Person	Second Person	Active	No	888-888-8888			TESTEMAIL@TOWNOFABC.GOV		
Report Total:												

1 - 2

5. Click on CREATE in the "Create User" column

Entity Contact											+
none	Extension	Mobile	Email	Additional Info	Create User	FHMS Read	FHMS Write	Stars	Last Update	Last Updated By	
	90-999-9999		TESTTEST@TOWNOFABC.GOV			Y	Y	Y	02-AUG-2021 10:03:50	TESTTEST@TOWNOFABC.GOV	
	88-888-8888		TESTEMAIL@TOWNOFABC.GOV		CREATE	Y	Y	N	21-OCT-2021 14:24:11	TESTTEST@TOWNOFABC.GOV	

1 - 2

The New User Registration page will be displayed

Fiscal Health Monitoring System Entity Tile Functions Job Aid



- Click the **Create New User** button on the bottom left of the page

The "New User Registration" form contains the following fields and values:

- User Name: TESTEMAIL@TOWNOFABC.GOV
- First Name: Test
- Last Name: Person
- E-mail Address: TESTEMAIL@TOWNOFABC.GOV
- Role: Entity Role
- Description: Second Person

Buttons: Cancel, Create New User

The user will be sent their temporary password to the email address you provided for them.

Editing Active User:

- Click the  to the left of the contact name to edit

The Entity Contact Edit page will display

The "Entity Contact Edit" form contains the following fields and values:

- First Name: John
- Middle Name: (empty)
- Last Name: Smith
- Contact Title: Finance Director
- Status: Active (selected), In-Active
- Primary Flag: Yes (selected), No
- Contact Phone: 860-999-9999
- Extension: (empty)
- Contact Cell: 000-000-0000
- Contact Email: TESTTEST@TOWNOFABC.GOV
- Additional Info: (empty text area)
- FHMS Read: Yes (selected), No
- FHMS Write: Yes (selected), No
- STARS: Yes (selected), No

Buttons: Cancel, Apply Changes

**Note:* Red markers indicate required fields

Fiscal Health Monitoring System Entity Tile Functions Job Aid



2. Enter the Entity Contact changes

*Notes: - Email addresses cannot be changed

- **FHMS Read** – “Yes” gives the contact access to read all data entered in FHMS
- **FHMS Write** – “Yes” gives the contact access to enter data in FHMS (but only the primary user (Town Administrator) has access to certify the data)
- **STARS** – “Yes” gives the contact access to the STARS database

3. Click


The Entity Contact page displays

Entity Contact is added

Changing the Primary User:

To change the primary user, complete the “FHMS New Primary Contact Form” and email it to OPM-FHMS@ct.gov. This form can be found in the Help/Support Tile or at <https://portal.ct.gov/OPM/IGP-MUNFINSR/Municipal-Financial-Services/Annual-Report---Fiscal-Health-Monitoring-System---FHMS>.

To get back to the main screen:

Click  at the top left corner of the page

The Main Menu will display