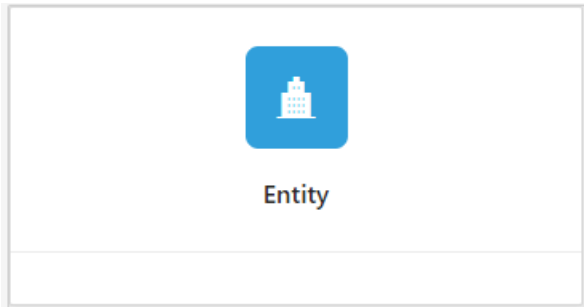


# Fiscal Health Monitoring System Entity Tile Functions Job Aid

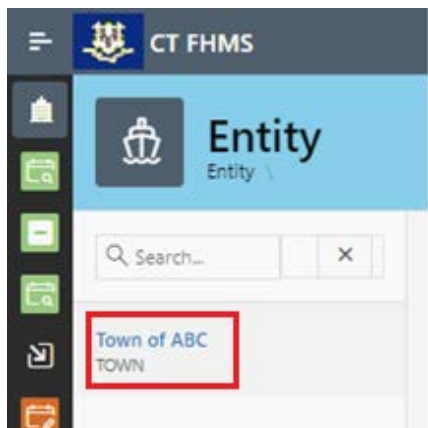


## 1. At the Main Menu – Select Entity Tile



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 triangle icon in the top left corner 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" (with a phone icon), "Extension", and "Contact Cell" (with a mobile phone icon). A "Contact Email" field has an envelope icon and a red asterisk. Below these is a large "Additional Info" text area. At the bottom, there are three sets of radio buttons: "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 

The Entity Contact page displays

Entity Contact is added

## Editing Active User:

1. Click the  to the left of the contact name to edit

The Entity Contact Edit page will display

A screenshot of the "Entity Contact Edit" form. The form is titled "Entity Contact Edit" and has a close button in the top right corner. It contains several input fields: "First Name" (John), "Middle Name", "Last Name" (Smith), "Contact Title" (Finance Director), "Status" (Active/In-Active), "Primary Flag" (Yes/No), "Contact Phone" (860-999-9999), "Extension", "Contact Cell" (000-000-0000), and "Contact Email" (TESTTEST@TOWNOFABC.GOV). There is also a large text area for "Additional Info". At the bottom, there are three radio button options: "FHMS Read" (Yes/No), "FHMS Write" (Yes/No), and "STARS" (Yes/No). The "Apply Changes" button is highlighted in dark blue, and there is a "Cancel" button.

\*Note: Red markers indicate required fields

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

# Fiscal Health Monitoring System Entity Tile Functions Job Aid




3. Click  **Apply Changes**

The Entity Contact page displays

Entity Contact is added

## To get back to the main screen:

Click  **CT FHMS** at the top left corner of the page

The Main Menu will display