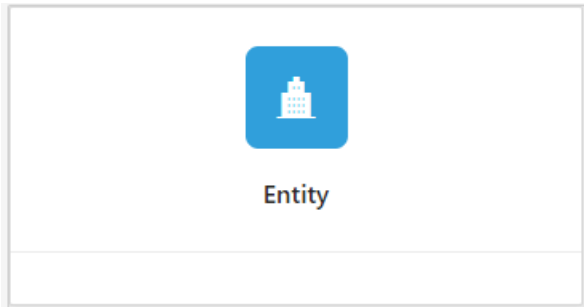


# Fiscal Health Monitoring System Entity Tile Functions Job Aid

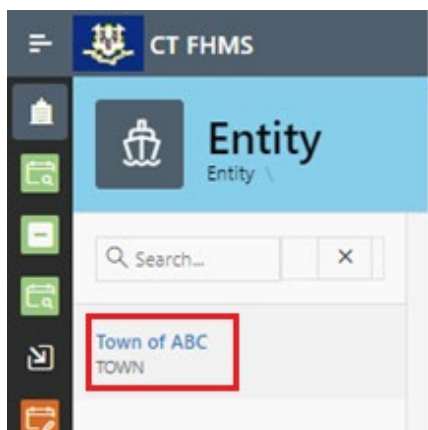


## 1. At the Main Menu – Select Entity Tile



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"), and "Primary Flag" (with radio buttons for "Yes" and "No"). 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), "FHMS Write" (Yes/No), and "STARS" (Yes/No). The "Save" button is highlighted in blue, and there is a "Cancel" button.

*\*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

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		
<b>Report Total:</b>												

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		<b>CREATE</b>	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



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

A screenshot of the "New User Registration" form. The form has a dark blue header with the text "New User Registration". Below the header, there are several fields with red asterisks indicating required fields. The fields are: "User Name" with the value "TESTEMAIL@TOWNOFABC.GOV", "First Name" with the value "Test", "Last Name" with the value "Person", "E-mail Address" with the value "TESTEMAIL@TOWNOFABC.GOV", "Role" with the value "Entity Role", and "Description" with the value "Second Person". At the bottom left is a "Cancel" button, and at the bottom right is a "Create New User" button.

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

## 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 has a title bar with "Entity Contact Edit" and a close button. The form contains several 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), "Contact Email" (TESTTEST@TOWNOFABC.GOV), and "Additional Info" (a large text area). At the bottom, there are three sets of radio buttons for "FHMS Read", "FHMS Write", and "STARS", each with "Yes" and "No" options. At the bottom left is a "Cancel" button, and at the bottom right is an "Apply Changes" button.

*\*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

## To get back to the main screen:

Click  at the top left corner of the page

The Main Menu will display