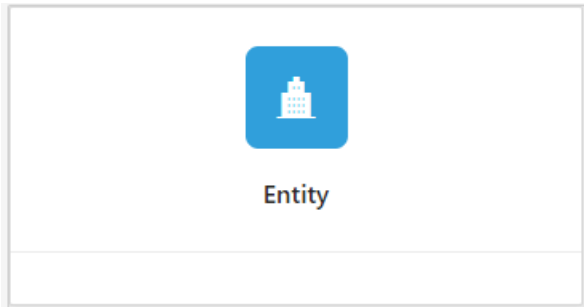**Fiscal Health Monitoring System**
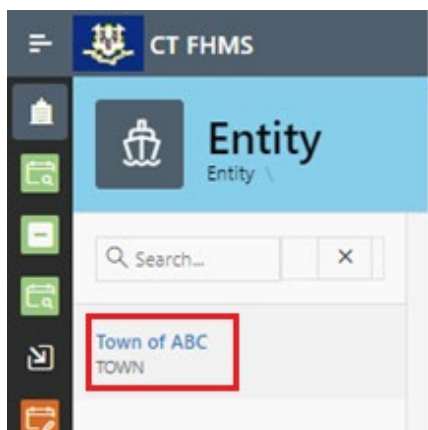**Entity Tile Functions**
Job Aid

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**

	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

Creating a New User:

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

     The Entity Contact Edit page displays

     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

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**

	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**

hone	Extension	Mobile	Email	Additional Info	Create User	FHMS Read	FHMS Write	Stars	Last Update	Last Updated By
50-999-9999			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

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

New User Registration

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

Cancel   Create New User

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

Entity Contact Edit   ☒

First Name	Middle Name	Last Name
John		Smith

Contact Title	Status *	Primary Flag
Finance Director	[Active] In-Active	● Yes ○ No

☎ Contact Phone	Extension	📱 Contact Cell
860-999-9999		000-000-0000

Contact Email *
✉ TESTTEST@TOWNOFABC.GOV

Additional Info

FHMS Read	FHMS Write	STARS
● Yes ○ No	● Yes ○ No	● Yes ○ No

Cancel   Apply Changes

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

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