Agency Admin Guide- How to Create a New User

Purpose: This guide indicates how to create a new HMIS user's profile once they have completed New User Training. Every new user will need a user profile created before a license can be assigned to their profile and they can have access to HMIS.

1. Click the Admin tab, then click User Admin
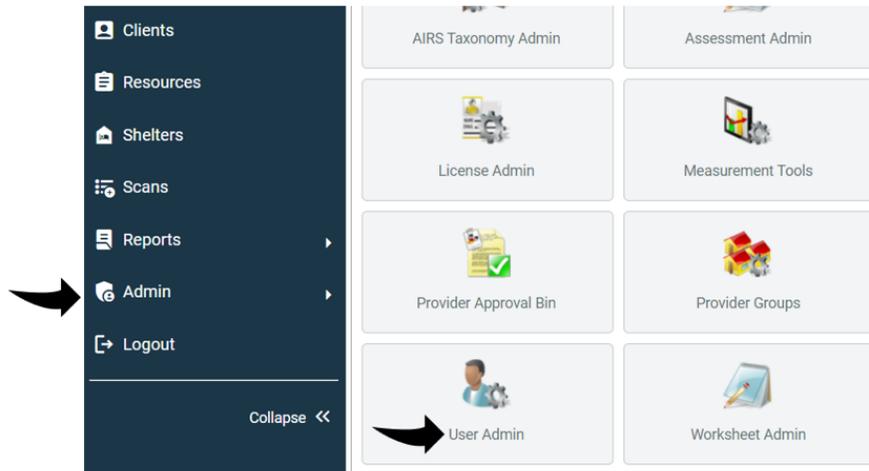
2. In the User Search bar, type the name of your new user and click Add New User.
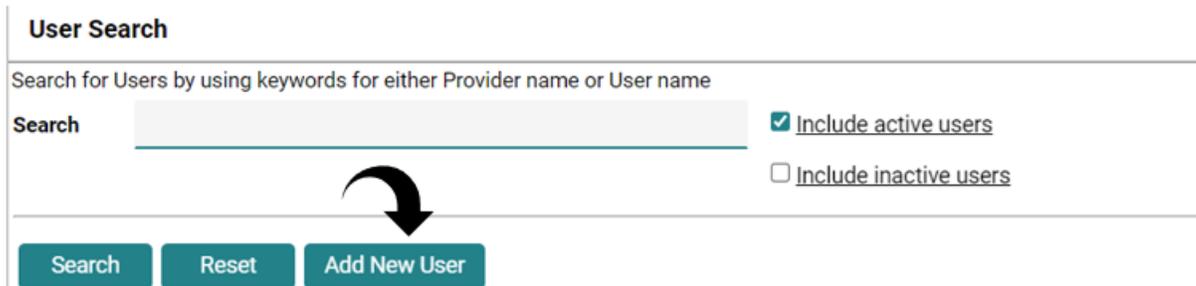
3. Complete all prompts under User Information. Enter the user's Name, Title, Email, Telephone, User Name, Password, Role, and User Expiration. The username should be the first letter of the users first name and their last name unless that username is already in the system. The temporary password can be your choice, or you can click Generate Password and the system will create one for you. This is a temporary password, and the user will create their own password when they log in. The User Expiration date should always be the last date of the year so this year it should be 12/31/20. (This is how the HMIS team tracks Ethics Refresher Training completion

User Information

Provider *	Please choose a provider. [Search]
Name *	Jim Halpert
Title	Case Manager
E-mail *	jhalpert@austinecho.org
Telephone	512-798-6765
User Name *	jhalpert
Password *	training2023 [Generate Password]
	Password must be 8-50 characters long with a mix of numbers, special characters, and uppe...
Role *	Case Manager III ▾
User Expiration	12 / 31 / 2023 📅 ↺ 📅

4. Choose the user's default EDA. EDA is Enter Data As and means the program the user will be entering data under. If user's will be entering data under multiple programs, they can have access to multiple EDA's. The default EDA should be the one the user will use most frequently. Click search next to Provider.

User Information

Provider *	Please choose a provider. [Search] [My Provider] [Clear]
Name *	Jim Halpert

5. Beneath Provider Search, type in the appropriate program and click search. Find the provider you want to set as the user's EDA, click the green plus sign next to that provider.

6. Click Save.

7. Click the pencil on the right under HMIS/HUD Training History.

8. Click Add and enter the user's New User Training date and click save then Save and Exit.

9. Uncheck "Allow User to Use Back Date Mode.

Settings & Special Permissions

☑ Allow User to Use The Clients Module
☐ Allow User to Create/Edit Client Incidents
☑ Allow User to Use The Shelters Module
☐ Allow User to Back Date Releases of Information
☐ Allow User to Use Back Date Mode
☐ Allow User to Change the Visibility of their Clients' Assessments
☐ Allow User to Perform Mass Visibility Updates on Client Data
☐ Allow User to Use The Scans Module
☐ Allow User to Use The Measurement Tools Module
☐ Allow User to Access ART as a System Administrator II
☐ Allow User to Use The Activities Module
☐ Allow User to Manage only Unnamed Clients
☐ Allow User to tab to Goal links within Assessments
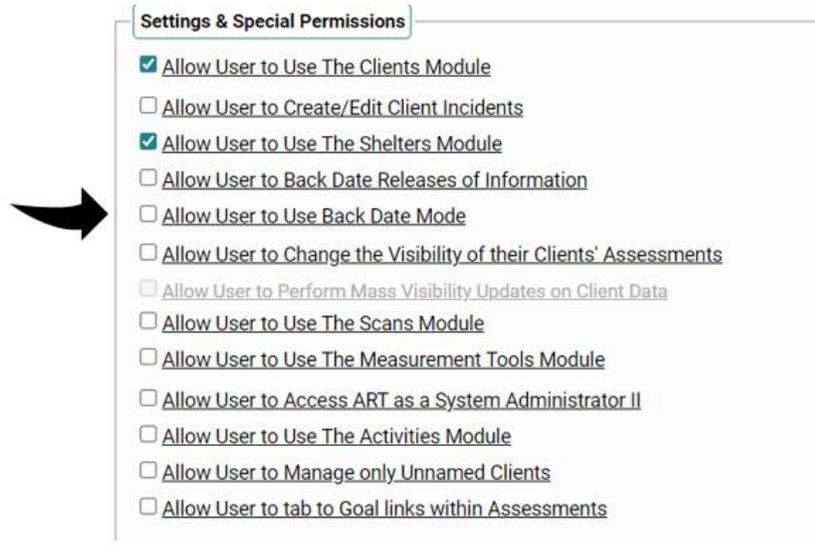
10. We will assign a license to the HMIS once they submit a Help Desk ticket letting us know they need a license assigned to their user profile. If your user needs additional EDA's assigned to their profile, you can click the "Enter Data As Groups" tab and add the EDA.

Back Date

Type here for Global Search

Enter Data As Groups

Type here for Global Search

Enter Data As Groups
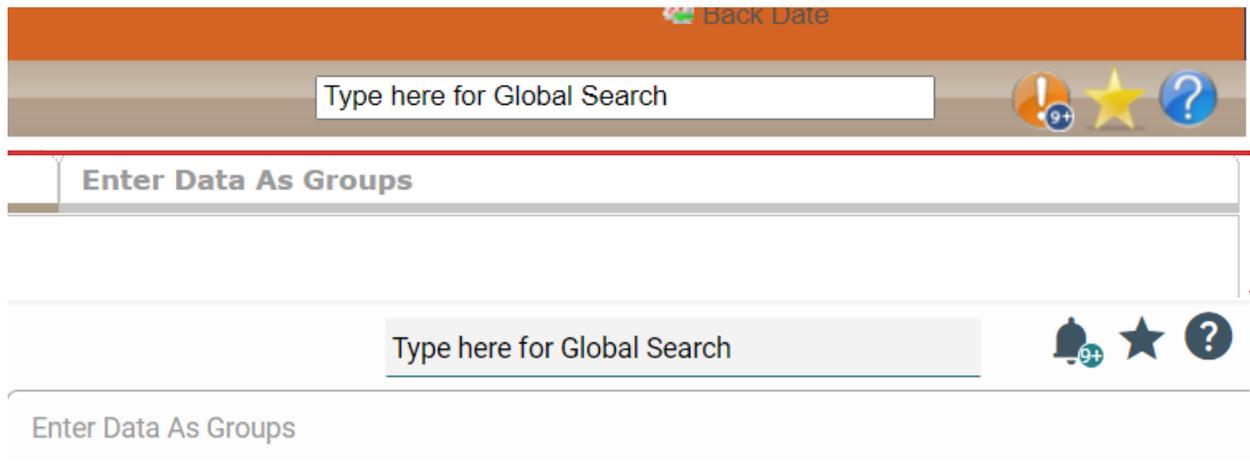
11. If an HMIS user from your staff leaves the agency, please inactivate the user but don't delete them. Then send a Help Desk ticket letting us know they've left your agency. That way we know to delete the user from HMIS and that frees up a license for your agency. Inactivate them by searching for the user in the User Admin tab, clicking on that user's profile and change their status to "inactivate."

Name *	Jim Halpert
Title	Case Manager
E-mail *	jhalpert@austinecho.org
Telephone	512-798-6765

User Name *	jhalpert	
Password *	********	Generate Password
	Password must be 8-50 characters long with a mix of numbers, special charact	
~~Password Expiration~~	~~Saturday, November 31, 2020~~	
Role *	Case Manager III ▾	
User Expiration	12 / 31 / 2020 🔁 Current	
Status	○ Active ● Inactive	
Consecutive Bad Logins	0 Reset	
Last Login	User has never logged in	
Has Accepted EULA	No	

HMTS/HUD Training history

Name *	Jim Halpert
Title	Case Manager
E-mail *	jhalpert@austinecho.org
Telephone	512-798-6765

User Name *	jhalpert	
Password *	********	Generate Password
	Password must be 8-50 characters long with a mix of numbers, special character	
Password Expiration	Tuesday, October 24, 2023	
Role *	Case Manager III ▾	
User Expiration	12 / 31 / 2023 🔁 Current	
Status	○ Active ● Inactive	
Consecutive Bad Logins	0 Reset	
Last Login	User has never logged in	
Has Accepted EULA	No	