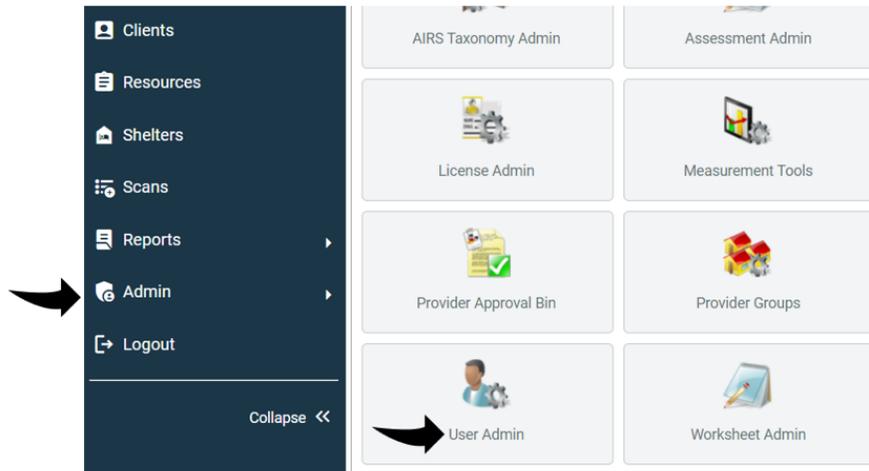


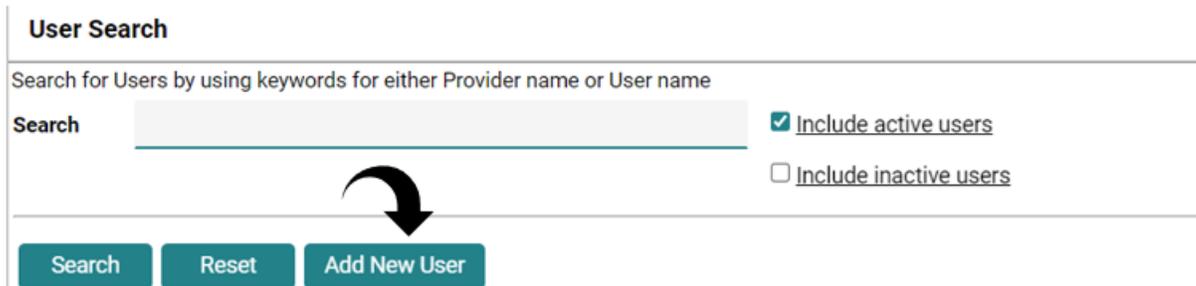
## Agency Admin Guide- How to Create a New User

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.



The screenshot shows the 'User Search' section. It includes a search bar with the placeholder text 'Search for Users by using keywords for either Provider name or User name'. Below the search bar are two checkboxes: 'Include active users' (checked) and 'Include inactive users' (unchecked). At the bottom of the section are three buttons: 'Search', 'Reset', and 'Add New User' (highlighted with a black arrow).

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**

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

- 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**

<b>Provider *</b>	Please choose a provider.	<b>Search</b>	<b>My Provider</b>	<b>Clear</b>
<b>Name *</b>	Jim Halpert			

- 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.

**Provider Search**

Search for providers by using keywords from the Provider Name or Description.

Search Lifeworks Show Advanced Options

Search Clear

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**Provider Number**

Enter or scan a Provider ID number to search for that Provider.

Provider ID #  Submit

---

**Provider Search Results**

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All	
Provider	Level	Phone	Location	Last Updated																								
BSS+ ESG-CV (RRH) - Lifeworks (9596)	Level 5	Unknown	Austin, TX 78701	09/08/2021																								
BSS+ ESG-CV SSO - Lifeworks (9604)	Level 5	Unknown	Unknown	01/11/2022																								
BSS+ (HP) - Lifeworks (9485)	Level 3	(512)735-2400	Austin, TX 78704	05/13/2022																								
BSS+ (RRH) - Lifeworks (9486)	Level 3	(512)735-2400	Austin, TX 78704	01/12/2022																								
LIFEWORKS (311)	Level 2	512-735-2400	Austin, TX 78704	09/14/2023																								

6. Click Save.

**User Information**

**Provider \*** BSS+ (RRH) - Lifeworks (9486) Search My Provider Clear

**Name \***

Title

**E-mail \***

Telephone

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**User Name \***

**Password \***  Generate Password

Password must be 8-50 characters long with a mix of numbers, special characters, and upper and lower case letters.

**Role \***

User Expiration

Save

**User Information**

**Provider \*** BSS+ (RRH) - Lifeworks (9486) Search My Provider Clear

**Name \***

Title

**E-mail \***

Telephone

---

**User Name \***

**Password \***  Generate Password

Password must be 8-50 characters long with a mix of numbers, special characters, and upper and lower case letters.

**Role \***

User Expiration

Save

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

HMIS/HUD Training history

**New User Training**

Start Date

---

HMIS/HUD Training history

**New User Training**

Has this user completed New User Training?	Date New User Training Attended and Completed

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

HMIS/HUD Training history

**New User Training**

Start Date

Add

**Add Recordset**

**New User Training**

Start Date: 11 / 19 / 2020

End Date: / /

Save Save and Add Another Cancel

**New User Training**

Has this user completed New User Training?	Date New User Training Attended and Completed
Add	

**Add Recordset**

**New User Training**

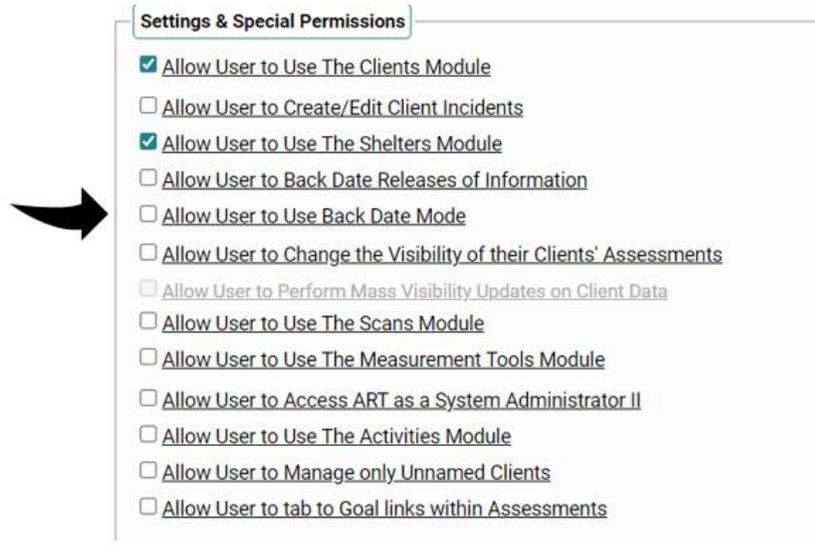
Has this user completed New User Training?	Yes	
Date New User Training Attended and Completed	10 / 25 / 2023	  
End Date		  

[Save](#) [Save and Add Another](#) [Cancel](#)

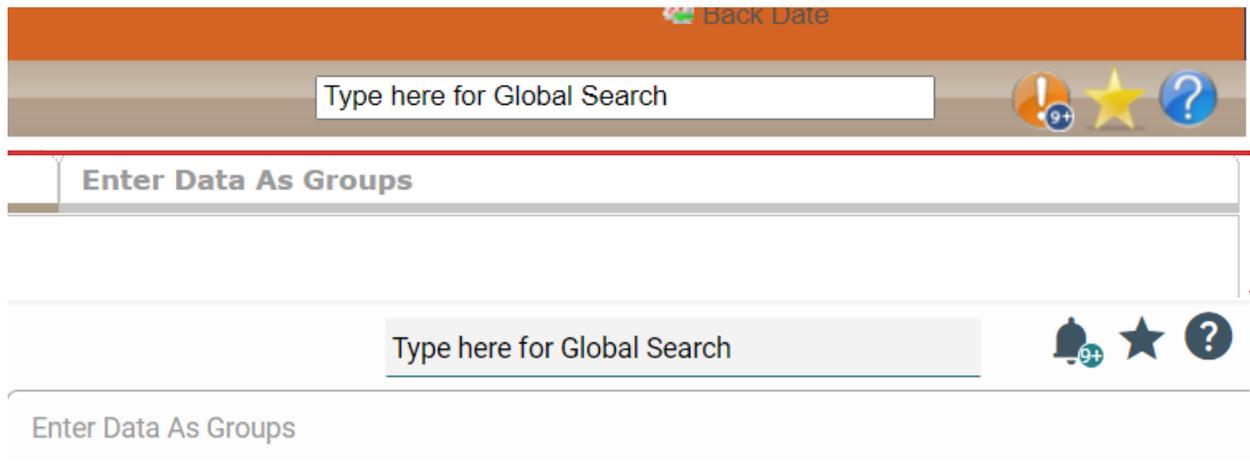
9. Uncheck “Allow User to Use Back Date Mode.

**Settings & Special Permissions**

- [Allow User to Use The ClientPoint Module](#)
- [Allow User to Create/Edit Client Incidents](#)
- [Allow User to Use The ShelterPoint 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 SkanPoint Module](#)
- [Allow User to Use The Measurement Tools Module](#)
- [Allow User to Use The ActivityPoint 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.



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 *	***** <a href="#">Generate Password</a>
Password Expiration	Saturday, November 24, 2020
Role *	Case Manager III
User Expiration	12 / 31 / 2020    Current
Status	<input type="radio"/> Active <input checked="" type="radio"/> Inactive
Consecutive Bad Logins	0 <a href="#">Reset</a>
Last Login	User has never logged in
Has Accepted EULA	No
<a href="#">HMS/HID Training history</a>	

Name *	Jim Halpert
Title	Case Manager
E-mail *	jhalpert@austinecho.org
Telephone	512-798-6765
User Name *	jhalpert
Password *	***** <a href="#">Generate Password</a>
Password Expiration	Tuesday, October 24, 2023
Role *	Case Manager III
User Expiration	12 / 31 / 2023    Current
Status	<input type="radio"/> Active <input checked="" type="radio"/> Inactive
Consecutive Bad Logins	0 <a href="#">Reset</a>
Last Login	User has never logged in
Has Accepted EULA	No