

## 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

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Reports		<b>**</b>
Admin +	Provider Approval Bin	Provider Groups
[→ Logout		
Collapse <	User Admin	Worksheet Admin

2. In the User Search bar, type the name of your new user and click Add New User.

User Sea	rch	
Search for Us	ers by using keywords for either Provider name or User name	
Search		Include active users
	3	□ Include inactive users
Search	Reset 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



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 up
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.



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Sea	rch	Lifeworks								Sh	ow Ac	lvano	ed 0	ption	s											
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## 6. Click Save.

Provider *	BSS+ (RRH) - Lifeworks (9486)	Search My Provider Clear
Name *	Jim Halpert	
Title	Case Manager	
E-mail *	jhalpert@austinecho.org	
Telephone	512-798-6765	
User Name *	jhalpert	
Password *	Welcome!1	Generate Password
	Password must be 8-50 characters long	with a mix of numbers, special characters, and upper and lower case letters.
Role *	Case Manager III 🗸	
User Expiration	12 / 31 / 2020 🧖 🔿 🦓	
		Save
Information		Save
Information	BSS+ (RRH) - Lifeworks (9486)	Search My Provider Clear
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Information rovider * ame *	BSS+ (RRH) - Lifeworks (9486) Jim Halpert Case Manager	Search My Provider Clear
Information rovider * ame * tile mail *	BSS+ (RRH) - Lifeworks (9486) Jim Halpert Case Manager jhalpert@austinecho.org	Save Search My Provider Clear
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Information rovider * ame * tite elephone ser Name *	BSS+ (RRH) - Lifeworks (9486) Jim Halpert Case Manager jhalpert@austinecho.org 512-798-6765	Search My Provider Clear
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Information rovider * ame * Ittle mail * elephone ser Name * assword *	BSS+ (RRH) - Lifeworks (9486) Jim Halpert Case Manager jhalpert@austinecho.org 512-798-6765 jhalpert training2023 Password must be 8-50 characters long with a mod	Search My Provider Clear  Generate Password  of numbers, special characters, and upper and lower case letters.:
Information rovider * ame * ttle mail * elephone ser Name * assword *	BSS+ (RRH) - Lifeworks (9486) Jim Halpert Case Manager jhalpert@austinecho.org 512-798-6765 jhalpert training2023 Passeord must be 8-50 characters long with a mix Case Manager III	Search My Provider Clear Generate Password of numbers, special characters, and upper and lower case letters.
Information Invoider *	BSS+ (RRH) - Lifeworks (9486) Jim Halpert Case Manager jhalpert@austinecho.org 512-798-6765 jhalpert training2023 Passeord must be 8-50 characters long with a most Case Manager III ~ 12 / 31 / 2023 © ©	Search My Provider Clear  Generate Password of numbers, special characters, and upper and lower case letters.

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		1
New User Training		
Has this user completed New User Training?	Date New User Training Attended and Completed	

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

HMIS/HUD	Training history			
New U	ser Training			
Start Date	•			
Add				
Add R	Recordset		di.	
	New User Training			
Sta	art Date	11 / 19 / 2020 🕂 🯹 🧞		
End	d Date	//		
	Save	Save and Add Another	Cancel	
New User Training				
Has is user comple	eted New User Training?	Date New User Trainin	g Attended ar	nd Completed
Add				

				2
ld Recordset			ē	×
ew User Training				
Has this user completed New User Training?	Yes 🗸			
Date New User Training Attended and Completed	10 / 25 / 2023	🛗 C 🛅		
End Date	/ /	🛗 C 🛱		

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







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 G	roups	
	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 w	with a mix of numbers, special ch
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Role *	Password must be 8-50 characters long w Columber 21, 2020 Case Manager III ✓ 12 //31 //2020 20 20 20 20 20 20 20 20 20 20 20 20	vith a mix of numbers, special ch
Role * User Expiration Status	Password must be 8-50 characters long w Celouday, Nauember 31, 3030 Case Manager III ↓ 12]/[31]/[2020] 20 30 30 40 Active © Inactive	vith a mix of numbers, special ch Current
Roseweed Explosition Role * User Expiration Status Consecutive Bad Logins	Password must be 8-50 characters long w Catwoday, Neuenber 31, 3030 Case Manager III V 12/31/2020 20 30 30 40 Active © Inactive 0 Reset	rith a mix of numbers, special ch Current
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Name *	Jim Halpert
Title	Case Manager
E-mail *	jhalpert@austinecho.org
Telephone	512-798-6765
User Name *	ihaloert
Password *	Generate Password
Password Expiration	Password must be 8-50 characters long with a mix of numbers, special character Tuesday, October 24, 2023
Role *	Case Manager III 🛛 🗸
User Expiration	12 / 31 / 2023 📅 🖸 🛱 Current
Status	O Active  Inactive
Consecutive Bad Logins	o Reset
Last Login	User has never logged in
Has Accepted EULA	No