How To Assign Roles

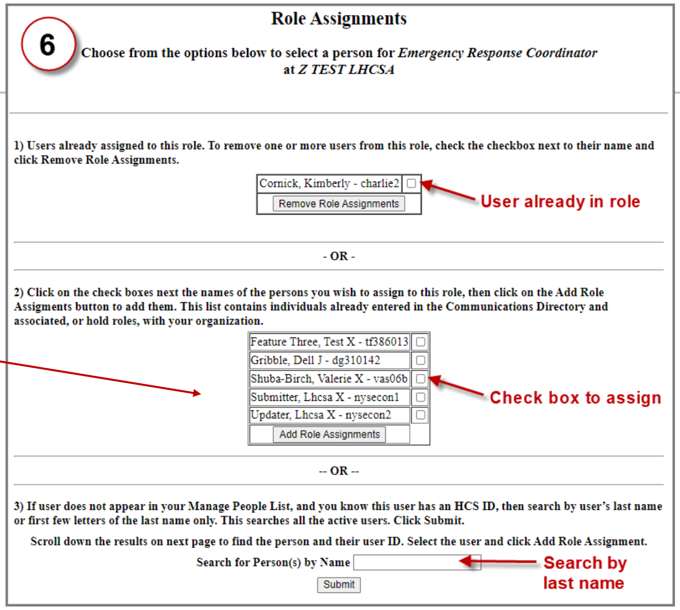
Roles are used to identify staff, send targeted notifications, and grant access to role-based applications.
Roles are managed by the organization’s HCS Coordinator.

Coordinator Steps to Assign a Role

1. Click **Coordinator's Update Tool**
2. Select the appropriate organization
3. Click **Select**
4. Click **Manage Role Assignments** (blue tab)
5. Click the **Modify** link located to right of a role name
6. Locate the option to Add Role Assignment
7. Select checkbox corresponding to user ID
8. Click **Add Role Assignment**

OR

7. Search for user by Last Name
8. Click **Submit**
9. Select the person from the list with a valid user ID
10. Click **Add Role Assignment**.



Remove User from Role

1. Click **Coordinator's Update Tool**
2. Select your organization > Click **Select**
3. Click **Manage Role Assignments**
4. Click Modify to the right of the role name
5. Check the box next to the name of the user you wish to remove from the role
6. Click **Remove Role Assignments**.

Review Role Report

1. Go to https://commerce.health.state.ny.us
2. Click **Coordinator’s Update Tool** from **My Applications** (left side panel)
3. Select your organization > Click **Select**
4. Select **Reports**
5. Select **Get Role Report**
6. **View** or **Download** report
7. As needed, proceed to **Remove User from Role** (instructions are below) or **Delete User** (right)
8. Click **Data Verified** when Manage People list and Role Report are up to date**.**