

Health Commerce System (HCS) Access and Roles Tips and Resources

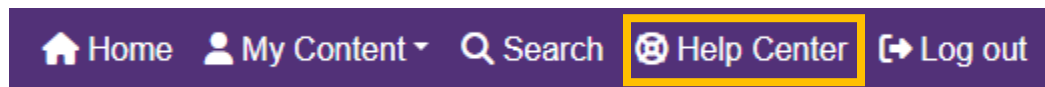
The following tips and resources help with access to the Health Commerce System (HCS) and how staff can update points of contact information and roles to ensure they get key information.

For the staff member who is to be assigned the Community Health Assessment (CHA) Contact or Community Service Plan (CSP) Hospital Coordinator roles or other HCS roles.

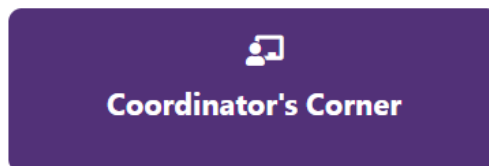
- The “**Quick Card**” details information on your account, roles and profile information, and is provided on the following page.
 - This resource can also be found at [Quick Card My Profile](#) which is available with an active HCS account to access.
- On the card, **Step 4** helps the users for **finding their HCS Coordinators**
 - The HCS Coordinator for the organization has access to assign the staff member to the appropriate roles.
- Also note, the **general help for users** email is listed at the bottom of the Quick Card: CAMU@health.ny.gov

If the staff member’s identified **HCS Coordinator needs information about assigning Roles**, they are able to find out more through the:

1. **Help Center** (Top Right Tool Bar)



2. **Coordinators Corner**



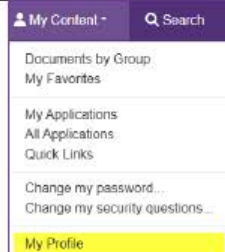
3. Go to the “**How To:**” Menu → [Assign Roles](#)

My Profile

The My Profile page in your Health Commerce System (HCS) account houses information related to your HCS account, such as business/emergency contact info and professional license info, as well as information related to your roles, coordinators, organizations, HCS Personal Identification Number (PIN), and security email.

How to Access My Profile

To access My Profile, select the **My Content** tab in the top menu bar and select **My Profile** in the dropdown menu.



Business and Emergency Contact Info

Business Contact Info may be viewed by another HCS user via the Communications Directory Search and Export Tool. It is also used by the HCS notification system for informational or advisory messages.

Emergency Contact Info is strictly confidential. Only you and your coordinator (with your permission), can view or update this information. The notification system retrieves this info for alerts, high advisories, and drills. Include at least one phone number that you are most likely to answer at any time of day.

If the notification system contacts you, you will be directed to acknowledge receipt of the message by clicking a link or by pressing 9 on your phone keypad.

No sensitive information should ever be disclosed.

My Profile Features

- 1. My Contact Information** – view or submit changes to your business and emergency contact information
- 2. My Profession Information** – view or submit changes to your professional license information received from the New York State Education Department.
- 3. My Roles** – view the list of Communications Directory roles that are linked to your User ID. These roles may grant you save, submit, and/or report-viewing privileges for specified HCS applications.
- 4. My Coordinators** – view contact information for the HCS Coordinators for all organizations with which you are affiliated. They can help you with your HCS account and role assignments.
- 5. My Organizations** – view information for organizations with which your account is affiliated.
- 6. My Account** – view or update your HCS Personal Identification Number (PIN), date of birth, and security email. Multi-factor Authentication (MFA) is required to access this page.
 - If you do not have an NYS driver or non-driver license, your **HCS PIN** can be used by the Commerce Accounts Management Unit (CAMU) to verify your identity.
 - Once verified, your **security email** can be used for retrieving your User ID, resetting your password, and receiving a one-time passcode for MFA.

A series of six screenshots showing the 'My Profile' page features, numbered 1 through 6. The screenshots are arranged in a vertical stack, showing different sections of the user interface. Each screenshot has a red circle with a number indicating the feature being highlighted.

- 1. My Contact Information:** Shows the 'Business Contact Information' and 'Emergency Contact Information' sections. The 'Business Contact Information' section includes fields for Country, United States, Address 1, Address 2, City, State, and Zip. The 'Emergency Contact Information' section includes fields for Business Hours, Non-Business Hours, and Phone.
- 2. My Profession Information:** Shows the 'Add a new Profession' form. It includes a 'Please Select' dropdown for Profession, a 'License Number' field, and 'Add' and 'Cancel' buttons.
- 3. My Roles:** Shows a table of roles. The table has columns for 'Role Description' and 'Organization Name'. The first row shows 'HCS Coordinator' for 'A County DOH Test (777)'.
- 4. My Coordinators:** Shows a table of coordinators. The table has columns for 'Organization', 'Name', 'Email', and 'Phone'. The first row shows 'A County DOH Test (777)' for 'First Aidkit' with email '123-456-7891' and phone '123-123-1234'.
- 5. My Organizations:** Shows a table of organizations. The table has columns for 'Organization', 'Name', and 'Address'. The first row shows 'A County DOH Test (777)' for 'Z Test Hospital (PFI) (8888)'.
- 6. My Account:** Shows the 'PIN # (only numbers)' field, 'Date of Birth (Month and Day only)' field, and 'HCS Security Email Address' field. It also includes a 'Confirm HCS Security Email Address' field and 'Save' and 'Cancel' buttons.

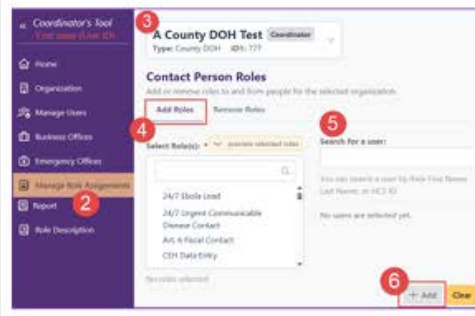
How to Assign Roles

Roles are managed by the organization's Health Commerce System Coordinator. Roles are used by organizations to identify staff assigned to specific roles. Roles also allow State and County Health Departments to send targeted notifications to users assigned to specific roles, and they grant users access to role-based applications.

Assign User to a Role

1. Click **Coordinator's Update Tool** in My Applications.
2. Click **Manage Role Assignments** in the left menu bar.
3. Select the appropriate organization.
4. In the **Add Roles** tab, select one or more roles.
5. In the **Search for a user** search bar, enter a user's first name, last name, or HCS ID. In the dropdown list, select the user(s) to whom you'd like to assign the selected role(s).
6. Select **Add**.
7. Select **Yes** to confirm.
8. A confirmation message will appear.

Contact person roles are added successfully.



Remove User from a Role

1. Click **Coordinator's Update Tool** in My Applications.
2. Click **Manage Role Assignments** in the left menu bar.
3. Select the appropriate organization.
4. In the **Remove Roles** tab, select a role.
5. Select the user you'd like removed from the role.
6. Select **Remove**.
7. Select **Yes** to confirm.
8. A confirmation message will appear.

Contact person roles are removed from the selected user(s).



Review Role Report

1. Click **Coordinator's Update Tool** in My Applications.
2. Select **Report**.
3. Select the appropriate organization.
4. In the **Assigned Roles** tab and the **Unassigned Roles** tab, you can view a list of users who have been assigned to contact roles, and you can view the contact roles that currently do not have assigned users.

