Coordinator's Audit of Organization

HCS Directors and HCS Coordinators are responsible for auditing their organization's users and 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 **Submit**
4. Select **Reports**
5. Select **Get Role Report**
6. **View** or **Download** report.
7. As needed, Remove User from Role(s) or Delete User
8. Click **Data Verified** when Manage People list and Role Report are up to date**.**

Remove User from Role

1. Click **Coordinator's Update Tool**
2. Select your organization > Click **Submit**
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 Assignment**.

Update User Contact Info

1. Click **Coordinator's Update Tool**
2. Select **Organization**
3. Click **Manage People**
4. Select **User's Name**
5. Modify both the Business and Emergency Contact Information tabs
6. Click **Submit.**

Delete Users

1. Click the **Coordinator's Update Tool**
2. Select your organization
3. Click **Select**
4. Click **Manage People** (blue tab)
5. Click the user's name link
6. Click **Delete Account**
7. If needed, Remove from Role and then Delete Account, or Remove User from Manage People List (for NA accounts—no user ID)

If you do not see a user in my Manage People list, then their user ID may exists with another organization. It does not mean that the user does not have any roles in your organization, so always check your **Role Report**.

Add User to Role

1. Click **Coordinator's Update Tool**
2. Select your organization > Click **Submit**
3. Click **Manage Role Assignments** (blue tab)
4. Click the Modify link located to right of the role name
5. Under section 2 (if no one is currently in role) or section 3 (if role has been assigned), check the box to the right of the person with an ID you wish to add to the role

TIP: Avoid assigning the role to an "na" after the user's name. This will not assign user any permissions.

   a. If you cannot locate the person in the list, then proceed to the last option, "Search for Person(s) by Name." Enter the person's last name in the Search for Person(s) by name.
   b. Click **Submit**
   c. Select the person in the list with a valid user ID

6. Click Add Role Assignments.

* If you need assistance with roles or accounts, please call the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 2 (M-F 8am-4:45pm) May 2022