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.

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.

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.

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
6. Click Add Role Assignments.

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.

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.

* 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)