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.

* 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)