

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**.

Role Assignments

6 Choose from the options below to select a person for *Emergency Response Coordinator* at *Z TEST LHCSA*

1) Users already assigned to this role. To remove one or more users from this role, check the checkbox next to their name and click Remove Role Assignments.

Cornick, Kimberly - charlie2	<input type="checkbox"/>
Remove Role Assignments	

- OR -

2) Click on the check boxes next to the names of the persons you wish to assign to this role, then click on the Add Role Assignments button to add them. This list contains individuals already entered in the Communications Directory and associated, or hold roles, with your organization.

Feature Three, Test X - tf386013	<input type="checkbox"/>
Gribble, Dell J - dg310142	<input type="checkbox"/>
Shuba-Birch, Valerie X - vas06b	<input type="checkbox"/>
Submitter, Lhcsa X - nysecon1	<input type="checkbox"/>
Updater, Lhcsa X - nysecon2	<input type="checkbox"/>
Add Role Assignments	

- OR -

3) If user does not appear in your Manage People List, and you know this user has an HCS ID, then search by user's last name or first few letters of the last name only. This searches all the active users. Click Submit.

Scroll down the results on next page to find the person and their user ID. Select the user and click Add Role Assignment.

Search for Person(s) by Name [Submit](#)

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.