To Assign Roles in the Health Commerce System (HCS)
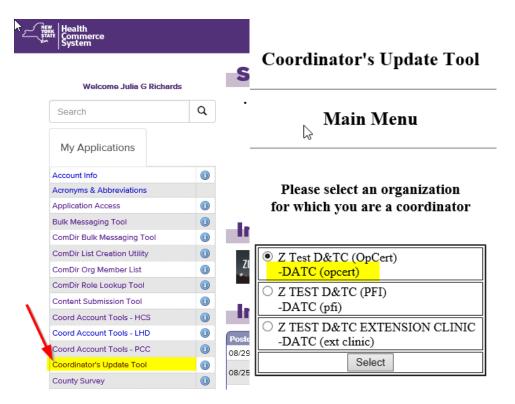
*** To assign roles, you must be in the role of <u>HPN/HCS Coordinator</u>. ***
DOH assigns this role to the Director upon initiation of new facility activation to HCS.
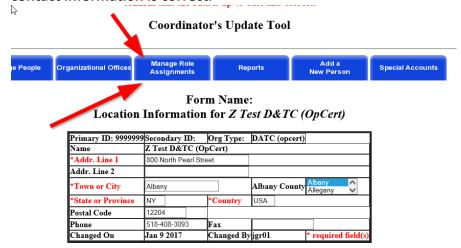
1. **Log into the HCS Portal at:** https://commerce.health.state.ny.us/public/hcs_login.html

2. **Click on Coordinator's Update Tool in the left column "My Applications" as seen below and choose your organization.**

3. Click on the tab "Manage Role Assignments" … and while you're on this screen, make sure your contact information is correct.

Coordinator's Update Tool

| People | Organizational Offices | Manage Role Assignments | Reports | Add a New Person | Special Accounts |

Form Name:
Location Information for *Z Test D&TC (OpCert)*

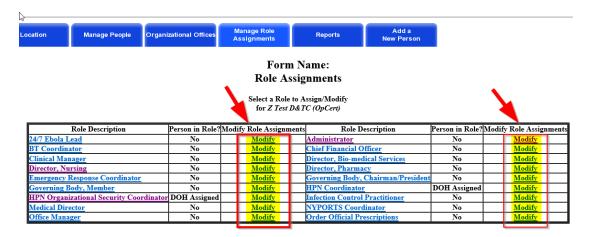| Primary ID: 9999999	Secondary ID:	Org Type:	DATC (opcert)	
Name	Z Test D&TC (OpCert)			
*Addr. Line 1	800 North Pearl Street			
Addr. Line 2				
*Town or City	Albany	Albany County	Albany / Allegany	
*State or Province	NY	*Country	USA	
Postal Code	12204			
Phone	518-408-3093	Fax		
Changed On	Jan 9 2017	Changed By	jgr01	* required field(s)

4. Click "Modify" next to the role you wish to assign as shown in screen shot below.

   For ePOC roles (Electronic Plan of Corrections) in Diagnostic and Treatment Clinics, please assign the following roles:
   - Administrator   Submit   - POC Editor   Edit
   - Clinical Manager   Submit   - Medical Director   View
   - Director, Nursing   Submit   - Governing Body/Member   view

   Important: Please review the name of the person who you expect to see assigned to a role. It should display the person's name followed by a dash and their HCS user account. (If it shows "no user account" or an "na", ePOC will not work for that person). If you see that the person's name is not displayed along with the user account, add the person to the role following step 5 below.

   If the person is already assigned to a role with only a name and an "na" or no userid after their name, then remove them from the role assignment by using the checkbox, and clicking "Remove Role Assignment". Again, the HPN/HCS Coordinator needs to add them using Step 5 below.

| Location | Manage People | Organizational Offices | Manage Role Assignments | Reports | Add a New Person |

Form Name:
Role Assignments

Select a Role to Assign/Modify
for *Z Test D&TC (OpCert)*

Role Description	Person in Role?	Modify Role Assignments	Role Description	Person in Role?	Modify Role Assignments
24/7 Ebola Lead	No	Modify	Administrator	No	Modify
BT Coordinator	No	Modify	Chief Financial Officer	No	Modify
Clinical Manager	No	Modify	Director, Bio-medical Services	No	Modify
Director, Nursing	No	Modify	Director, Pharmacy	No	Modify
Emergency Response Coordinator	No	Modify	Governing Body, Chairman/President	No	Modify
Governing Body, Member	No	Modify	HPN Coordinator	DOH Assigned	Modify
HPN Organizational Security Coordinator	DOH Assigned	Modify	Infection Control Practitioner	No	Modify
Medical Director	No	Modify	NYPORTS Coordinator	No	Modify
Office Manager	No	Modify	Order Official Prescriptions	No	Modify

5. Once you click "Modify", check the box next to each person you wish to assign to the role and click "Add Role Assignment. If you don't see the person's name, their primary organization is under another facility. You can search for them by Name. Look for a new <u>with a userID</u>, NOT one with an "na", which means the person does not have an account. After you select the person's name <u>with a userID</u>, click "Add Role Assignment".