To Assign Roles in the Health Commerce System (HCS)

*** To assign roles, you must be in the role of HPN/HCS Coordinator. ***
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

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

   Primary ID: 9999999
   Org Type: DATC (OpCert)
   Name: Z Test D&TC (OpCert)
   Add. Line 1: 400 North Pearl Street
   Add. Line 2: Albany, Albany County, USA
   Phone: 518-408-5093
   Fax: 
   Changed On: Jan 9 2017

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 - POC Editor
   - Clinical Manager - Medical Director
   - Director, Nursing - Governing Body/Member

   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.

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 with a userID, NOT one with an “na”, which means the person does not have an account. After you select the person’s name with a userID, click “Add Role Assignment”.

   Location
   Manage People
   Organizational Office
   Manage Role Assignments
   Reports
   Add a New Person