

## Assign an EDRS Role to Individuals with Existing Accounts in the Health Commerce System (HCS)

This process is completed by the facility's HCS Coordinator.

Follow these steps to grant EDRS access to an individual in a given role.

1. Log into HCS with your HCS **User ID** and **Password**.
2. Click **Coordinator's Update Tool** link from your *HCS Home Page*.
3. Click the radio button to select the appropriate organization(s) to which the individual will be assigned.
4. Click the **Select** button.
5. Click **Manage Role Assignments** (blue tab on the banner).
6. Click the **Modify** link to right of the EDRS role name associated with your organization.

**NOTE: An individual should be assigned to only one EDRS role within your organization.** For example, a Funeral Director should be assigned the role of EDRS Funeral Director only.

**PLEASE NOTE:** HCS Coordinators for funeral firms will still need to assign themselves a user role if they need to access cases.

For a:	Select:
Funeral Director	EDRS Funeral Director
Funeral Firm staff person	EDRS Funeral Firm Facility Staff
Physician or other authorized and licensed medical certifier	EDRS Medical Certifier
Medical Examiner/Coroner	Medical Examiner/Coroner
Medical Facility staff person	EDRS Facility Staff
Local Registrar	EDRS Local Registrar
Deputy Registrar	EDRS Sub-registrar
Sub-registrar	EDRS Sub-registrar

7. Perform one of the following:
  - a. If you see the person's name under section 3, click the box next to the name and click **Add Role Assignments**.  
**NOTE:** Do not assign the role if there is 'na' after their name, especially if you know the user has an existing HCS account.
  - b. If you cannot locate the person in the list, scroll down to section 4. Enter the person's last name in the *Search for Person(s)* by name, and click **Submit**. Highlight the person in the list with a valid user ID and click **Add Role Assignments**.
8. To confirm that the individual was assigned to the EDRS role in your organization go back to **Manage Role Assignments** (blue tab on the banner within the *Coordinator's Update Tool*), and click the **Modify link** located to the right of the EDRS role you just assigned. The individual's name should now appear under section 2.



9. Notify the user that he or she has been assigned the role and should now see EDRS in the *My Applications* list the next time they log into HCS. If the EDRS link is not there, click on the “**Refresh My Application List**” button. He or she should be able to log into EDRS and select the organization from the *EDRS Office Selection* screen.

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## Remove an EDRS role when an individual leaves your organization or his/her role changes

Follow these steps when you need to remove EDRS access from an individual.

1. Complete Steps 1-6 above.
2. In section 2 of the *Role Assignments* page, locate the user you wish to remove in the table and click on the checkbox to the right of his or her name.
3. Click **Remove Role Assignments**. You will be returned to the Coordinator’s Update Tool, Role Assignments page. A confirmation message should display at the top of the main window, confirming the person is successfully removed from the EDRS role.

**For additional assistance, please call the EDRS Call Center at 1-844-866-EDRS (3377)**