

Assigning an EDRS Role to Individuals with an Existing Account in the Health Commerce System (HCS)

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

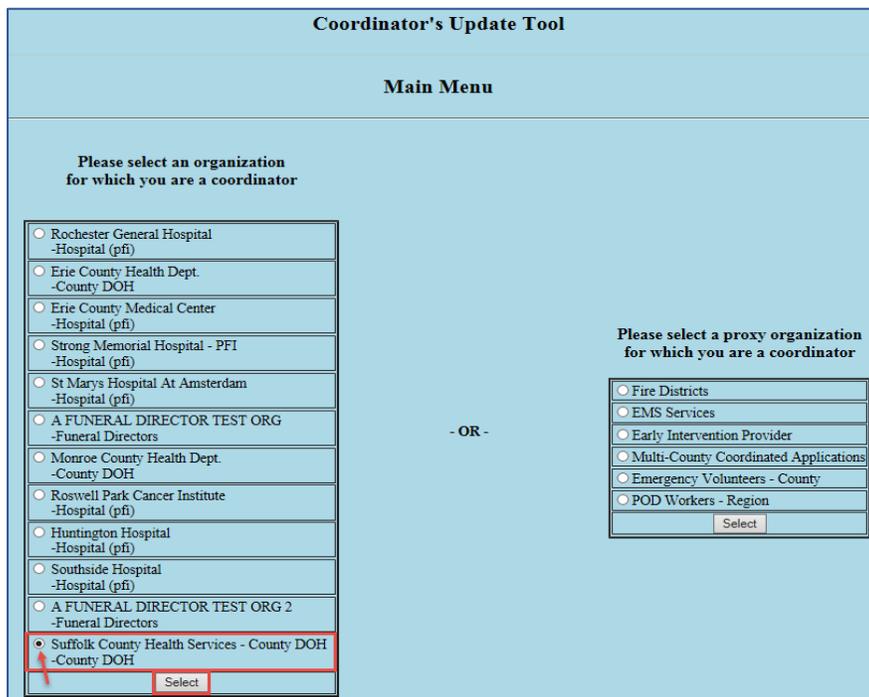
NOTE: Each EDRS user should be assigned only one (1) EDRS role at a facility in HCS. An individual may be assigned a different EDRS role at a different facility, but not two roles at one facility. (An HCS Coordinator may be assigned an EDRS role at the same facility where they have their HCS Coordinator role assignment, and that is still considered just one EDRS role assignment.)

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. On the HCS home page, click **Coordinator's Update Tool** link in the My Applications panel.



3. On the left side of the Coordinator's Update Tool Main Menu, select the appropriate office by **clicking the radio button** to the left of the office/organization at which you will be assigning the individual an EDRS role, and then click **Select**.





4. Click the **Manage Role Assignments** tab (blue tab on the banner).



5. In the list of Role Assignments, locate the desired EDRS role that you need to assign an individual to. Note that the Role Assignments list is in a two-sided table, divided with a centerline down the middle. Click the **Modify** link to right of the desired role name.

Death ME/Coroner Staff	No	Modify	Death Medical Examiner/Coroner	Yes	Modify
Death Unlicensed Coroner	No	Modify	Director, Disease Control	Yes	Modify

The table below defines which role to select for which type of user and which type of facility/office.

For This Type of User:	Select This EDRS Role:
County Health Department	
Medical Examiner or medically licensed Coroner (MD or DO)	Death Medical Examiner/Coroner
Coroner who is not medically licensed	Death Unlicensed Coroner
Staff personnel in the Medical Examiner/Coroner's, such as investigator or clerk	Death ME/Coroner Staff
Medical Facilities and Medical Practice Groups	
Physician (MD or DO), Nurse Practitioner (NP), or Physician Assistant (PA)	EDRS Medical Certifier
Medical facility staff person who is not a medical certifier	EDRS Facility Staff
Local Registrar's Office	
Local Registrar	EDRS Local Registrar
Deputy Registrar	EDRS Sub-registrar
Sub-registrar	EDRS Sub-registrar
Funeral Firm	
Funeral Director	EDRS Funeral Director
Funeral firm staff personnel	EDRS Funeral Firm Facility Staff



NOTE: An individual should be assigned to only one EDRS role within one facility/office.
Review the following guidance:

Medical Facilities

- A Medical Certifier should only be assigned the role of *EDRS Medical Certifier* at a given facility. A Medical Certifier should not be assigned the role of *EDRS Facility Staff*, unless they will not need to medically certify EDRS cases at that facility. They should never be assigned both roles at the same facility.
- Physicians in private practice who need to share work on EDRS cases with other staff or colleagues in their medical practice should have their office set up in HCS and their HCS Coordinator should assign each user an EDRS roles at that office/facility.

Individual Practitioners

- If a private practice physician does not need to share EDRS cases with other staff or colleagues in their office, then they may set up their private office directly in EDRS as an *Independent Medical Certifier Office*. An *Independent Medical Certifier Office* created directly in EDRS does not have an HCS Coordinator and cannot have other staff added to the office.

Medical Examiner/Coroner's Office

- A Medical Examiner or medically licensed Coroner should be assigned the role of *Death Medical Examiner/Coroner* at their County DOH Medical Examiner/Coroner Office.

Funeral Firm

- A Funeral Director should only be assigned the role of *EDRS Funeral Director* in a given facility. That same Funeral Director could be assigned a role of *Funeral Firm Facility Staff* at a different facility, but they should never be assigned the roles of both *Funeral Firm Facility Staff* and *Funeral Director* at the same facility.

HCS Coordinators

- HCS Coordinators who also need to access EDRS cases are the one exception to the one-role rule. If the HCS Coordinator needs to access EDRS cases, then they need to also assign themselves an EDRS user role at that facility/office.
6. Two important parts of the next screen are described below – **Select** and **Search**. Depending on if you already have other users assigned to the designated role at the facility, these two sections might be numbered as sections 3 and 4 on the page, or as sections 2 and 3.

Role Assignments

Choose from the options below to select a person for *EDRS Medical Certifier* at *Huntington Hospital*

1) Make the *EDRS Medical Certifier* role non-applicable (N/A) [Make N/A](#)

-- OR --

2) Persons already assigned to this role. To remove one or more persons from this role, check the checkbox next to their name and click on the Submit button.

Nathan EDRS Eval XLV - tedrs45	<input type="checkbox"/>
Nathan EDRS Eval XXXV - tedrs35	<input type="checkbox"/>
Smithgall Studentseven - tedrs107	<input type="checkbox"/>
Smithgall Studentten - tedrs110	<input type="checkbox"/>

- OR -

3) Select names from the drop down list 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. (Use Ctrl/left click for multiple selections or to unselect)

Users already associated with the selected facility will be listed here for you to select.

Andrews, James X - jy397813
Beason, Samina X - na
Burgess, Anderson X - ab390139
Caswell, Maude X - na
Cheng, Lou X - ln410468
Celli, Robert X - hpn7552
Croth, Marybeth X - mc390440
Crusky, Luna X - lc303732
Domar, Nancy X - na
Domar, Nancy X - nc327748

Do not select a user account that is 'na' - not active.

-- OR --

4) Finally, if the person does not appear in the list above, this will be their first role assignment in this organization and you will need to search for them in the directory. If the search returns no matches, you will have the opportunity to add a new person on the next screen. Enter the last name, or the first few letters of the last name, and click Submit.

For users not listed in the block above, search for and select them here.

Search for Person(s) by Name

-- OR --

5) Return to the list of roles. [Back to Role Assignments](#)

- a. For some roles, the **Select** list is a scrollable list; while for other roles the Select list contains a **check box** next to the individuals' names. The **Select** (or **Click the check boxes**) section contains a list of users already associated with the facility/organization you chose on the first screen of the *Coordinator's Update Tool*.

If you see the desired individual's name listed here, **click on their name** to select it, **or click in the checkbox** next to their name, and then click **Add Role Assignments**.

IMPORTANT: Do not select a name that has '- na' after the name. The *na* indicates that specific user account is **not active**. If you do not see an active account for the desired individual, then use the **Search** section instead to locate the individual's active user account.

- b. The **Search** section is below the *Select/Click the check boxes* section. **Search** should be used to locate and select individuals not already listed in the *Select* section above. Enter the person's last name, or a portion of their last name, in the **Search for Person(s) by Name** field, and click **Submit**. A list of closely matching names will pop up. Click on the desired name, and then click **Add Role Assignment**.

NOTE: Be sure to only select a name that does not have ' - na ' after their name, because that is not an active account. Inactive user accounts will have the ' - na ' designation appearing in the middle of the item, after the individual's name. You should only select an individual that has a valid user ID in that position instead of ' - na '.

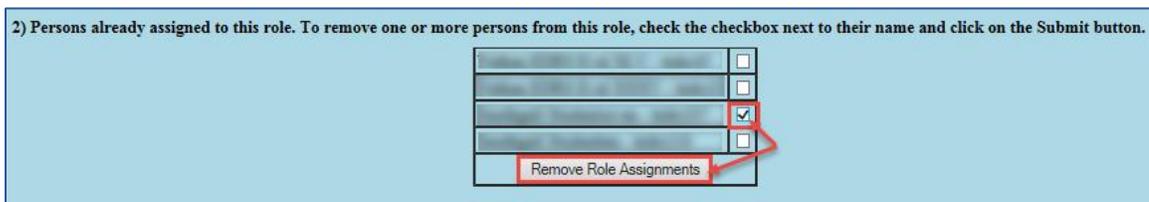
7. When finished, scroll down the page and click the link to return **Back to Role Assignments**.
8. To confirm that the individual was assigned the EDRS role in your organization go back to **Manage Role Assignments** (blue tab on the banner within the *Coordinator's Update Tool*), and click the **Modify** link to the right of the EDRS role you just assigned. The individual's name should now appear in section 2) **Persons already assigned to this role**.
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 sign into EDRS and select the organization from the *Select your Office* page.

Removing an EDRS Role When an Individual's Role Changes or They Leave Your Organization

An individual should be assigned to only one EDRS role within one facility/office. When a user changes position/role within a facility, such as a former Sub-registrar becoming the Local Registrar in the Local Registration Office, then the HCS Coordinator must remove the individual from their original role and add them to their new role. In addition, when an individual leaves the organization or changes to a new position that no longer requires access to EDRS, the HCS Coordinator must remove the individual's EDRS role assignment.

Follow these steps to remove EDRS access from an individual.

1. Complete Steps 1-5 above.
2. On the Role Assignments page, in section 2) **Persons already assign to this role**, locate the name of the user(s) you wish to remove from the role. Click in the **checkbox** to the right of the user's 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 in HCS.



4. After removing the user's role assignment in the Coordinator's Update Tool, please also contact the EDRS team by email (edrs@health.ny.gov) or telephone (1-844-866-3377) to confirm that the user's profile within EDRS is revised to reflect your change, if necessary.

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