This process, completed by a facility's HCS Coordinator, demonstrates assigning to or removing from an EDRS role from a user with an existing Health Commerce System (HCS) account. An individual should be assigned to only one EDRS role within one facility/office. An individual may be assigned a different EDRS role at a different facility, but not two roles at one facility.
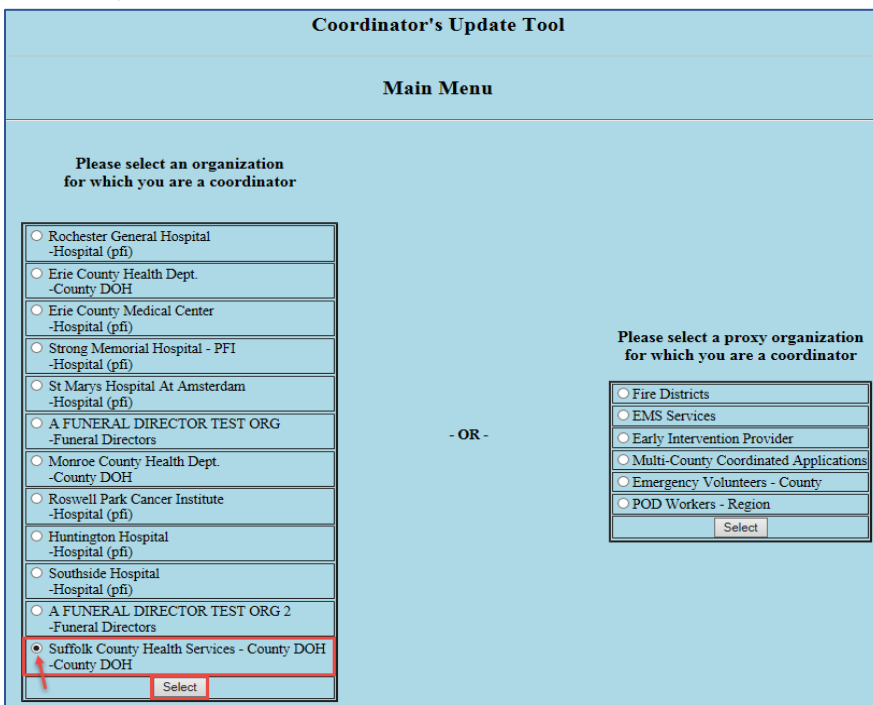
When a user changes position/role within a facility, such as a former Sub-registrar becoming the Local Registrar in the Local Registration Office, then the HCS Coordinator must remove the individual from their original role and add them to their new role. In addition, when an individual leaves the organization or changes to a new position that no longer requires access to EDRS, the HCS Coordinator must remove the individual's EDRS role assignment.
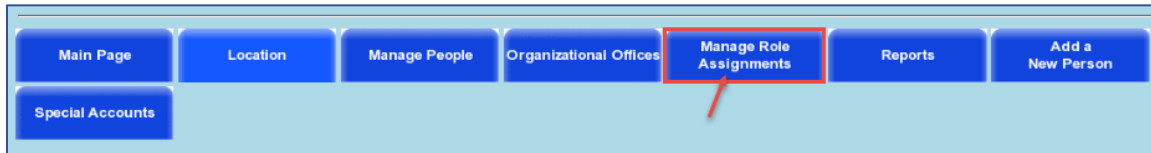
Assign an EDRS Role

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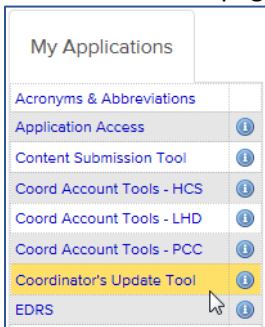
3. On the left side of the *Coordinator's Update Tool Main Menu*, select the appropriate office by **clicking the radio button** to the left of the office/organization at which you will be assigning the individual an EDRS role, and then click **Select**.

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

Main Page	Location	Manage People	Organizational Offices	Manage Role Assignments	Reports	Add a New Person
Special Accounts						

5. In the two-column list of *Role Assignments*, locate the desired EDRS role for assignment to an individual.

Role Description	Person in Role?	Modify Role Assignments	Yes Role Description	Person in Role?	Modify Role Assignments
EDRS Facility Staff	No	Modify	EDRS Medical Certifier	No	Modify
Death ME/Coroner Staff	Yes	Modify	Death Medical Examiner/Coroner	Yes	Modify
Death Unlicensed Coroner	Yes	Modify		No	Modify
EDRS Funeral Director	No	Modify	EDRS Funeral Firm Facility Staff	No	Modify
EDRS County DOH User	No	Modify		No	Modify

The table below defines the EDRS role to select for each type of user at each type of facility/office.

For This Type of User:	Select This ONE (1) EDRS Role:
County Health Department	
New York State Medically Licensed Medical Examiner or 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	
New York State Medically Licensed 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**

The following exceptions apply:

Physicians in Private Practice

If a private practice physician does *not* need to share EDRS cases with colleagues/staff in that office, or operates independently as a Coroner's Physician, he or she can set up an *Independent Medical Certifier Office* profile in EDRS, not requiring an HCS Coordinator. No other staff can be added to this office.

HCS Coordinators

- The HCS Coordinator role is external from EDRS. HCS Coordinators who also need to access EDRS cases must assign themselves an EDRS user role at that facility/office, aligning with job duties as identified in the previous table.

6. Click the **Modify** link to the right of the desired role name.

7. On the *Role Assignment* page, perform the following, as necessary to add an EDRS role:

NOTE: *Only assign ONE (1) EDRS role per individual within a facility/office.*

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   a. If the user is listed in the "*Search names from the drop-down list…,*" scroll down to locate the individual's active user account. Click on the name to highlight it, then click **Add Role Assignments.**

   b. If the user is NOT listed in the "*Search names from the drop-down list…,*" go to the section beginning, "*Finally, if the person does not appear…*". Type the 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:
>
> • Section numbering on the HCS *Role Assignments* page changes based on if users are already assigned the selected role at the facility; sections **3** and **4** or sections **2** and **3**.
>
> • **DO NOT** select a name with **' – na'** after their name, because that is not an active account.

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 ☐
Nathan EDRS Eval XXXV - tedrs35 ☐
Smithgall Studentseven - tedrs107 ☐
Smithgall Studentten - tedrs110 ☐
Remove Role Assignments

- 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 Assigments 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.

Add Role Assignments

-- 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 [   ]
Submit

-- OR --

5) Return to the list of roles. Back to Role Assignments

8. When finished, scroll down the page and click the **Back to Role Assignments** link.

9. 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*...".

10. If the individual had a different EDRS role assigned to this facility which was not removed prior to adding a new role above, follow the steps below to remove the original role. Again, an EDRS user should only have one role assigned per facility.

11. When adding a role, 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, the user should 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

The HCS Coordinator should remove an EDRS role if:

*   A new EDRS role is being assigned at the same facility/office to an existing EDRS user, such as a former medical facility staff person who became a NYS medically licensed professional. The HCS Coordinator must remove the individual from his or her original role and add the new role, if not already done so.

*   The existing EDRS user changes responsibilities in the facility/office and no longer needs access to EDRS.

*   The existing EDRS user leaves their affiliation with the facility/office.

1. Complete Steps 1-5 above.

2. On the *Role Assignments* page, click on the checkbox to the right of the desired individual's name in the section beginning, "*Persons already assigned to this role*…".

3. Click **Remove Role Assignments**.
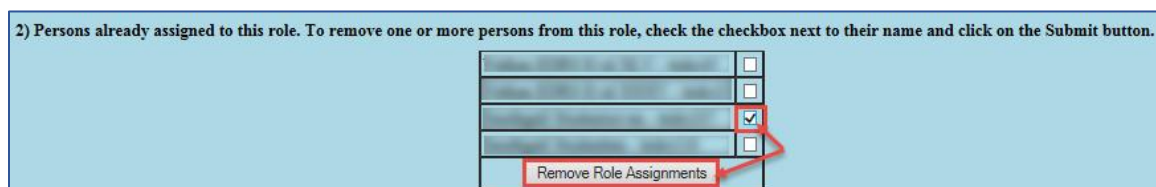
You will be returned to the *Coordinator's Update Tool, Role Assignments* page. A confirmation message should display at the top of the main window, confirming the person is successfully removed from the EDRS role in HCS.

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.