New York State Cancer Registry
New York State Department of Health

Guide for Physician Medical Practices to Obtain Health Commerce System (HCS) Accounts

This document is intended to provide guidance to physicians and their staff in setting up accounts for the New York State Department of Health's Health Commerce System (HCS). These accounts are used to report cancer cases using the Cancer Registry's secure confidential on-line entry application called the *Physician Cancer Case Reporting System*.

Setting Up the Physician Account

1. Request a physician account application using the public link **https://hcsteamwork1.health.state.ny.us/pub/top.html**
   Note: "https" indicates it is a secure address and secure transmission.
   - This step can be performed by the physician or someone else; however, information about the physician, such as driver's license number, Social Security number, and medical license number are needed to complete the request.

2. Click **Request an HCS Medical Professions account application** to access the application form.
   - The person completing the application is asked to check a box that applies to the physician:
     - The first choice is **"I am the primary practitioner of a medical practice (incorporated/partnership/proprietorship)."** If selected, a valid Business Entity Number is needed. To look up the entity number, use the link to the State Education Department's Online Verification Search page (http://www.op.nysed.gov/opsearches.htm#eng).
       Note: The HCS classifies this choice as a "Medical Practice."
     - The second choice is **"I am not the primary practitioner of a medical practice."** While this might seem counterintuitive, select this link to set up an HCS account under the physician license number or when the providers practice under their own names (that is, the practice does not have a Business Entity Number).
       Note: The HCS classifies this choice as "MDs as Organization."
   - IMPORTANT: It is *essential* that the physician's professional email address be correct because the application form will be emailed to that address.

3. The New York State Department of Health (NYSDOH) will email a "Security and Use Policy" and application form to the physician within approximately three days after the request form is submitted. The physician must:
   - Read the "Security and Use Policy".
   - Review and sign the form and have it notarized.
   - Make a copy of the form for future reference.
     IMPORTANT: The "temporary access number" is essential for account activation after the form is approved.
   - Mail the *original* to the address on the form.

4. The Commerce Accounts Management Unit (CAMU) processes forms within a few days.
   - The physician will receive an activation letter via the U.S. Postal Service. This letter includes
     - instructions for on-line account activation and
     - a PIN (personal identification number), which is used for activation and for future communication with CAMU.
   - Using the PIN and the "temporary access number" (from the saved copy, see #3 above), the physician can begin the activation process. When the activation process is complete, the physician will have his/her own User Id and new password.

IMPORTANT: *Only the physician is authorized to activate and access his/her account.*
Continue to page 3 for instructions on obtaining accounts for staff linked to the physician account/license number.

Setting up Staff Accounts (HCS Coordinators)

Staff designated to report cancer cases must have their own HCS accounts, but they must be linked to physician accounts. It is recommended a designee be given an HCS Coordinator account because Coordinators have rights similar to the physician and can manage the account for the physician (such as adding additional Coordinators or users if necessary).

A physician account can be set up in different ways as described in the previous section: that is, under the Business Entity Number, which is given the HCS organization type classification of "Medical Practice," or under a physician's individual license number, which is given an HCS organization type classification of "MDs as Organization." Setting up staff accounts may differ depending on the type of physician account. Please call the Physician Reporting Field Representative at the Cancer Registry, 518-474-0971, for guidance should you need help.

A. Setting up the first HCS Coordinator Account(s):

Each physician with an HCS account is the Administrator, Security Coordinator, and HCS Coordinator of his/her account. As HCS Coordinator, at least one physician initiates the process of setting up staff to report for the practice using the following steps:

1. To access the Health Commerce System (HCS):
   - A. Go to an Internet browser (e.g., Internet Explorer, Mozilla Firefox).
   - B. In your browser's address bar, type **https://commerce.health.state.ny.us/**
     Note: "https" indicates it is a secure address and secure transmission.
   - C. Click **Go** (or press **Enter** on the keyboard).
     ➢The Health Commerce System welcome screen pops up.
   - D. Enter your User Id and password. Click **Sign In** or press **Enter**.
     ➢The HCS Home screen opens.

2. To request a Coordinator account:
   - A. Click **Coord Account Tools - HCS** in the **My Applications** box on the left side of the screen.
     Note: If you do not see My Applications, click the small yellow arrow at the top left.

     1. Click **REQUEST AN ACCOUNT** in the blue box on the upper right of the screen.
     2. To view and print instructions, click **Coordinator** under the "Instructions…" column.
     3. Under "Duties and Responsibilities," print both the **Organization Security and Use Policy** and **Individual Security and Use Policy.**
        - o Give to your Coordinator designee to read and retain.
     4. Under "Request an account for a…" column, click **Coordinator**.
     5. Have the "Information Needed for Completing Form" available, referring to the list presented, and click **Continue.**
     6. Enter data items to complete the form.
     7. Print the completed form.

   - B. Both the physician and Coordinator designee sign the form. The Coordinator designee *must* have his/her signature notarized. The physician's signature does not need to be notarized on this form.

   - C. Make a copy of the form for future reference. The "temporary access number" is *essential* for account activation after the form is approved.

    D. Send the *original* form to the address provided on the form.

3. The Commerce Accounts Management Unit (CAMU) processes forms within a few days.

    A. The Coordinator will receive an activation letter via the U.S. Postal Service that includes:
        - instructions for on-line account activation and
        - a PIN (personal identification number), which is used for activation and for future communication with CAMU.
    B. Using the PIN and the "temporary access number" (from the saved copy; see C above), the Coordinator begins the activation process.

When finished with the activation process, the Coordinator will have his/her own User Id and new password. *Only that Coordinator is authorized to activate and access his/her account.*

B. Granting the designated staff access to report for all physicians:

As stated above, depending on the type of account the physician has, granting staff access to report for him/her might differ slightly.

1. If physicians in the practice have HCS accounts set up under their Business Entity Number (that is, the HCS organization type classification "Medical Practice"):
    - At least one physician must grant the designated staff person an account using steps in Section A above.
    - The *Physician Cancer Case Reporting System* will be able to link this staff person with other physicians with accounts set up under the same business entity number.

      <u>Or</u>
    - The other physicians who have HCS accounts can grant the staff with an existing HCS User Id the role of <u>Physician Cancer Reporting</u> by using the instructions **Granting Staff the Ability to Report Cases for a Specific Physician** on the next page.

2. If physicians in the practice have HCS accounts set up under their medical license numbers (that is, the HCS organization type classification "MDs as Organization"):
    - At least one physician must grant the designated staff person an account using steps in Section A above.
    - The other physicians who have HCS accounts can grant the staff with an existing HCS User Id the role of <u>Physician Cancer Reporting</u> by using the instructions **Granting Staff the Ability to Report Cases for a Specific Physician** on the next page.

If there is a mixture of physician HCS account types in your practice or you need guidance on how best to set up physician and staff accounts, call the Physician Reporting Field Representative at the Cancer Registry at 518-474-0971 for guidance on how best to proceed.

Granting Staff the Ability (Role) to Report Cases for a Specific Physician

Once a staff person has his/her own HCS account and User Id under at least one physician in the practice, other physicians in the practice can grant the staff person the role of <u>Physician Cancer Reporting</u> under his/her HCS account using the following steps:

1. Log onto the Health Commerce System (HCS).

2. Click **Coordinator's Update Tool** in the **My Applications** box on the left side of the screen.

3. Choose the organization, and click **Select.**
   - The Coordinator's Update Tool opens.

4. Click **Manage Role Assignments**.
   - Find <u>Physician Cancer Reporting</u> under Role Description and click the **Modify** button in that row.
   - If there are users associated with your account/organization, go down to **3)** and check the box next to each individual you want to assign the role and click **Add Role Assignments**.
     Note: If you cannot find the user's name, go to **4)** and search for the user using last name. Simply enter the name and click **Submit.** When a list appears, highlight the user's name and click **Add Role Assignments.**
   - A message appears, indicating that you have successfully added the staff person to <u>Physician Cancer Reporting</u>.

If you have any questions or problems granting staff the role <u>Physician Cancer Reporting</u>, contact the Cancer Registry Physician Reporting Field Representative at 518-474-0971 for assistance.

Reporting Cancer Cases to the Registry

Physician and HCS Coordinators have access to the *Physician Cancer Case Reporting System* applications. Staff designated as "Users" rather than "Coordinators" must be granted the role of Physician Cancer Reporting by the physician or HCS Coordinator/designee.

1. To access the Health Commerce System (HCS)
   - Go to an Internet browser (e.g., Internet Explorer, Mozilla Firefox).
   - In your browser's address bar, type **https://commerce.health.state.ny.us/**
     Note: "https" indicates it is a secure address and secure transmission.
   - Click **Go** (or press **Enter** on the keyboard).
     ➢The Health Commerce System Welcome screen appears.
   - Enter your User Id and password. Click **Sign In** or press **Enter**.
     ➢The HCS Home screen opens.

2. To access the Cancer Registry Physician Reporting System:
   - Under **My Applications** on the left side of the screen, click **Physician Cancer Reporting**.
     - If you do not see this application in your list, click **HCS Applications** on the menu bar along the top to open a catalog of applications available. Find Cancer Reporting – Physicians on the alphabetized list. Click the green icon in the Add or Remove column.
     - If you are not successful, call the Cancer Registry at 518-474-0971 for assistance.

3. When the ***Physician Cancer Case Reporting System*** opens:
   - A physician-specific page opens.
     - If you report for multiple physicians, a physician list opens (PHY101 appears at the bottom right). Select the appropriate physician and click **Continue** to open the physician's page (PHY102).
     - If you are a physician or you report for only one physician, your page or the single physician's page opens (PHY102 appears at bottom right).
   - The physician page (PHY102) contains a box on the left side. This box may contain various "Case Report Types."
     - **NEW – Begin New Cancer Case Report** always appears. Click this to begin a new case report. Click **Continue**.
     - **LAB – [Patient Name]** appears when there is a laboratory followback case for which the Cancer Registry requires information. Click that item to complete it. Then, click **Continue**.
     - **DCO – [Patient Name]** appears when there is a death certificate followback case for which the Cancer Registry requires information. Click that item to complete it. Then, **c**lick **Continue**.
     - **NEW – [Patient Name]** appears when a new case report was started but not yet submitted. Click that item to complete it. Then, click **Continue**.
   - If case report type of **LAB** or **DCO** is selected, the "Followback Status" tab opens (PHY201), which requires the user to do one of the following:

- Select a reason the case will not be reported, provide physician referral or treating hospital information if available, and click **Continue**.
  - ➢ A thank you page message appears indicating completion of followback request.
- Leave the selection as the default “Case report will be completed” and click **Continue** at the bottom of the page.
  - ➢ The “Patient Information” tab opens (PHY301).

- For new cases, select **NEW – Begin New Cancer Case Report**, or for those started and saved, select **NEW – [Patient Name]**.
  ➢ The “Patient Information” tab opens.

- Complete all fields in the “Patient Information” tab (PHY301) by entering information as text or selecting from the drop-down lists.
  - For help with completing fields, click **Help-Physician Manual** located at the top right to open the *Physician Reporting Manual.* The manual provides detailed explanations of the fields.
  - The type of cancer (item #25) is a required field. When all fields have been completed, click **Continue.**
    ➢ The “Cancer Information” tab (PHY 401) opens, displaying fields specific to the type of cancer selected in item #25.

- After completing all fields in the “Cancer Information” tab, select **Continue.**
  ➢ The “Treatment” tab opens.

- After completing fields, click **Submit Case Report** to transmit the case securely to the Cancer Registry or click **Save Changes and Edit** to save the case for future editing.

If you have specific or general questions using the Cancer Registry Physician Reporting System, call the Cancer Registry at 518-474-0971 for assistance.

Frequently Asked Questions

1. **If I am having difficulty activating my HCS account or need a new password, whom do I contact for assistance?**

   Call Commerce Accounts Management Unit (CAMU) at 866-529-1890 for all questions related to account activation and passwords.

2. **Do I need to retain the original PIN that I received in the letter with the instructions to activate my HCS account?**

   Yes, the original PIN is used for identification purposes when you contact CAMU.

3. **Are HCS accounts active indefinitely?**

   If an account is not used for more than five months, it becomes inactive. To reactivate the account, the user must call CAMU at 866-529-1890.

4. **How does the HCS coordinator give a "User" the ability to report cases?**
   The User account must be set up under the physician account (name/license number) for the User to be able to report cases for that particular physician. To assign the role:
   - Log into the HCS.
   - Click **Coordinator's Update Tool** in the **My Applications** box on the left side of the screen.
   - Click **Manage Role Assignments**.
   - Find <u>Physician Cancer Reporting</u> under Role Description and click the **Modify** button in that row.
   - Go down to 3) and check the box next to each individual you want to assign the role and click **Add Role Assignments**.
     Note: If you cannot find the User's name, go to 4) and search for the User using the last name. Highlight the User's name and click **Add Role Assignments**.

5. **How can I learn more about using the HCS?**

   - HCS Portal Orientation Guide
     - i. Select **Topics** on main menu
       1. Using "Select Groups" drop-down menu, select "Getting Started."
       2. Click **Training** folder.
       3. Click "Read me first! HCS Portal Orientation" to open document.
     - ii. Note: Different groups have different HCS training documents available in the **Training** folder.
   - Self-paced Learning for HCS Coordinators
     - i. Under My Applications, click the information icon next to **Coord Account Tools – HCS**
       1. Scroll to the bottom of the page to **Tutorial** under **Application Assistance** and click on **<u>Self-paced Learning</u>.**
       2. Scroll down to the bottom of the page to find course names and descriptions.
   - Call the Cancer Registry Physician Reporting Field Representative at 518-474-0971 for assistance finding training tools.