Instructions for Accessing and Completing the School Immunization Survey

Please log on to the Health Commerce System (HCS) at: https://commerce.health.state.ny.us, to verify that your account is active.

- If your account is **NOT** active, contact the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890.
- HCS Coordinators do not have to assign themselves to an additional role to access the survey.
- HCS Coordinators must assign staff with HCS user accounts to a role for them to access the survey.
  - HCS Coordinators for a **public school district** will need to assign the role of school district nurse or school district data reporter to staff with user accounts who will be entering and submitting data for schools in the district.
  - HCS Coordinators for a **non-public school** or BOCES will need to assign the role of non-public school nurse or school data reporter to staff with user accounts who will be responsible for entering and submitting the survey data.
- Instructions for assigning a role are listed below. For help assigning a role, please contact Informatics at 518-473-1809.

Assigning Roles by the HCS Coordinator:
1. Log onto the HCS.
2. Click on **Coordinator's Update Tool**.
3. **Choose the school organization** you wish to update with a school nurse role or school data reporter role, and click on **Select**.
4. Click on **Manage Role Assignments**.
5. Click on **Modify** next to the role that you want to assign an individual.
6. A pop-up list will be displayed of the individuals affiliated with your school district/school who have HCS accounts.
7. Check the box next to each individual you want to assign to the role and click on **Add Role Assignment**.
8. If the individual you want to assign to the role is not on the pop-up list, use the search box to find them in the directory. Another pop-up list of names will be displayed. Highlight the name of the person you would like to add to the role and click on Add Role Assignments.

9. If the individual you want to assign to the role does not appear in the new pop-up list, then he/she has not been issued an HCS account and needs to submit the paperwork to receive one.

10. If you have just been assigned to a role and are unable to see the survey, you need to log off the HCS for approximately 15 minutes. When you log on again, you should be able to access the survey.

Accessing the School Survey Link
(You only need to complete the steps for accessing the School Survey link the first time you logging into the survey.)

1) Go to: https://commerce.health.state.ny.us.

2) Select My Content on the menu bar at the top of the screen.

3) Select All Applications from the drop down box.

4) Select S to locate the School Survey application from the list of HCS applications.
5) Click on the **green and white plus icon** in the Add/Remove column and return to the HCS homepage.

6) The **School Survey** link should now appear under **My Applications** in the menu to the left of your screen on the HCS homepage and should be there every time you log onto the HCS.

If you are not the HCS Coordinator, you need to be assigned to a role to access the survey. Contact your HCS Coordinator for assistance.
Instructions for Completing the School Immunization Survey

1) Click on School Survey (the words “School Survey” not the blue circle with an i in the middle):

2) Select a User Access Level (only staff assigned to more than 1 user access level will see this screen). To access all the school surveys for the district, select School District. To access an individual public school survey within a district or a non-public school survey, select Facility:
3) Click on **Data Entry:**

4) Select **School Immunization Survey** from the activity drop down box. If you are only assigned to the **School Immunization Survey**, the activity will be automatically selected for you:
5) Select the appropriate school district or school from the **Organization drop down box.** Non-public School staff (includes BOCES & OCFS schools) will see the data entry screen for their school:

6) School Districts (non-public schools and BOCES data entry screen will automatically display): select one of the district schools from the **Data Entity** drop down box:
7) Click on **Show Organization Info** and **Show Facility Info** to see the address and phone number for the district and/or school:

![Image of Health Electronic Response Data System (HERDS) interface]

8) The district and/or school information will display:

![Image of Health Electronic Response Data System (HERDS) interface]
9) To enter data in the survey, click on **Grade Groups**:

10) Click on **Save & Add**:
11) Select a grade group from the **Select a Value** drop down box:

12) Enter data for the grade group (A) and click on **Save & Add** again (B). Repeat steps 11 and 12 until you have entered data for all the grade groups in the school:
13) Once you have completed entering data for **all** your grade groups, click on **Save All**:

14) Click on **Review & Submit**:
15) Click on **Submit Data to DOH**:

16) You will receive the **Data have been submitted to DOH successfully** message. The survey process is complete: