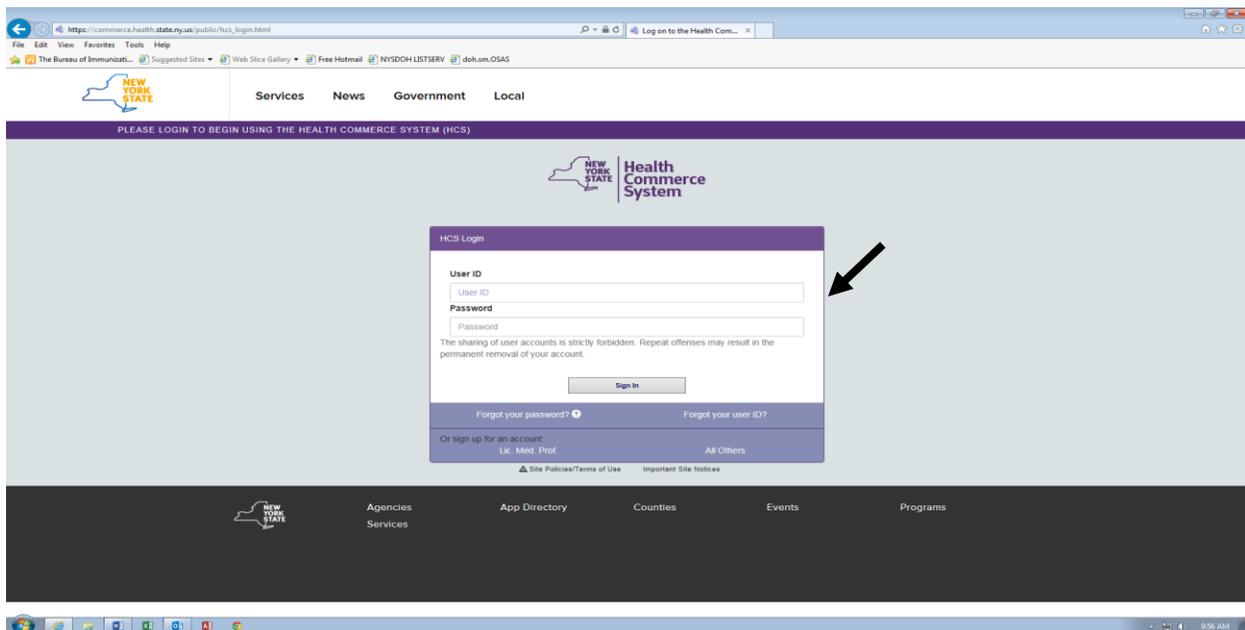


Instructions for Accessing and Completing the School Immunization Survey

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.)

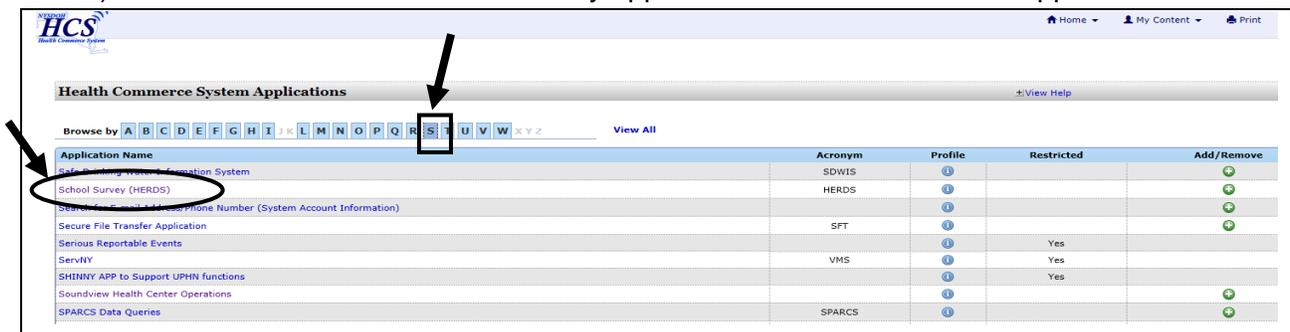
- 1) Go to: <https://commerce.health.state.ny.us>.
- 2) Select **My Content** on the menu bar at the top of the screen.



- 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.

Application Name	Acronym	Profile	Restricted	Add/Remove
School Survey (HERDS)	HERDS			
Secure File Transfer Application	SFT			
Serious Reportable Events			Yes	
ServNY	VMS		Yes	
SHINNY APP to Support UPHN functions			Yes	
Soundview Health Center Operations				
SPARCS Data Queries	SPARCS			

- 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.

Welcome Nancy Murtha

My Applications

- Acronyms & Abbreviations
- CART
- ComDir Bulk Messaging Tool
- ComDir Org Member List
- ComDir Reverse Search
- ComDir Role Lookup Tool
- ComDir User Agreement Search
- Coord Account Tools - LHD
- Coord Account Tools - PCC
- County Survey
- Emergency Contacts
- HCBC
- HERDS
- HIN Account Maintenance
- Medicaid Pharmacy COD Survey
- NH Surveillance
- NORA
- NYSIIS - Production
- NYSPQC Scheduled Delivery Sys
- PH Notices
- Role Lookup Tool
- School Survey**

System Notices

- Please note: next week we plan on switching over all HCS users to live, production system, available here: <https://hcsv4.health.state.ny.gov>

DOH is very pleased to announce the release of version 4.0 of the HCS. Continually improve, the HCS will be enhanced even more. Please visit and use HCSv4.0, which is now available here:

Important Health Events...

NYSPMP
PRESCRIPTION MONITORING PROGRAM REGISTRY

Important Health Notifications

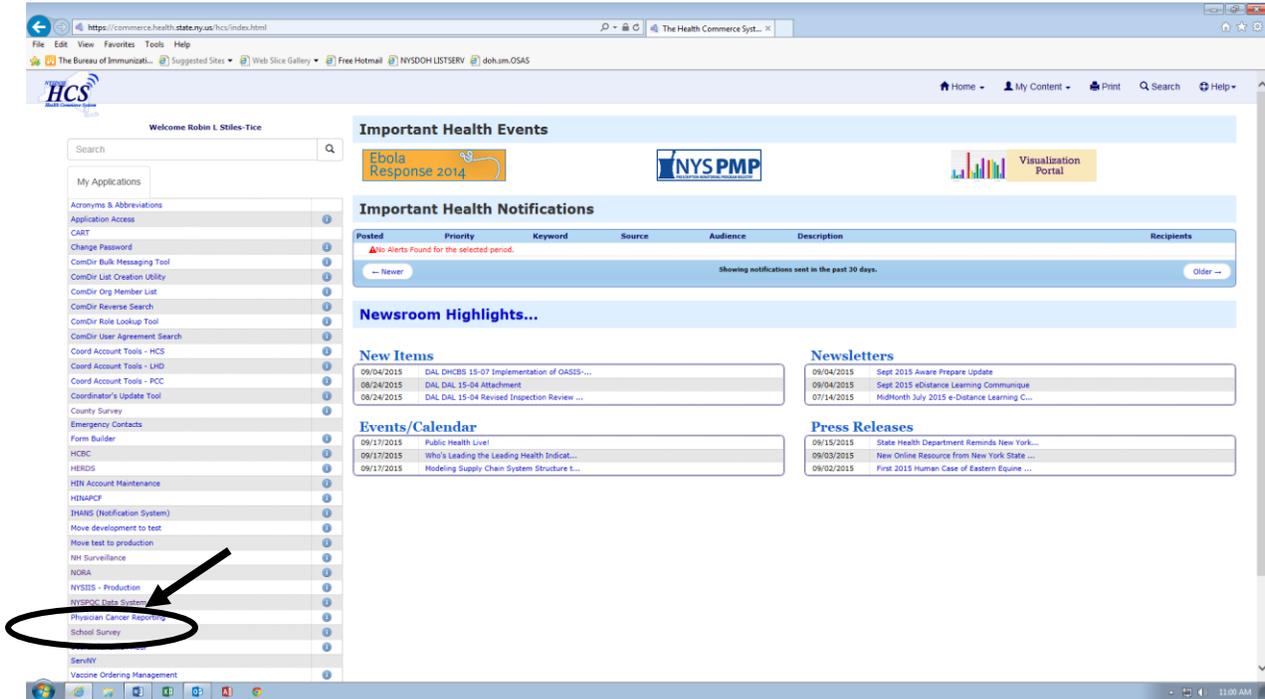
Posted	Priority	Keyword	Source
08/08/2014	Advisory	Ebola	NYSDOH
08/04/2014	Advisory	Infectious Disease	NYSDOH
08/02/2014	Advisory	Infectious Disease	CDC and NYSC
07/29/2014	Advisory	Infectious Disease	CDC
07/25/2014	Advisory	Chikungunya and Dengue	NYSDOH
07/24/2014	Advisory	Listeria	NYSDOH

Newsroom Highlights...

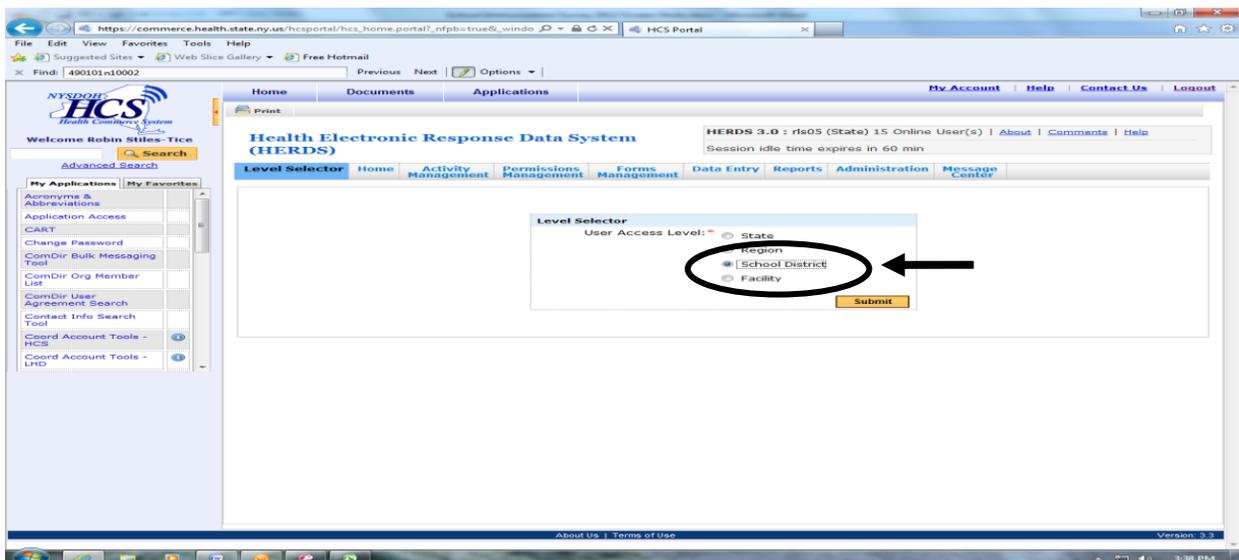
If you are not the HCS Coordinator, you need to be assigned to a role to access the survey. Contact your HCS Coordinator for assistance.

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**:

The screenshot shows the HERDS 3.0 interface. The navigation menu includes Home, Activity Management, Permissions Management, Forms Management, **Data Entry**, Reports, Administration, and Message Center. Below the menu, there are sections for 'To Do' and 'System/Activity Messages'. The 'To Do' section contains a table of activities:

Activity	Reporting Organization	Data Entry Organization	Form	Permission	Completion Status
NORA Outbreaks	Andrus on Hudson	Form Id:123233 Report Date:01/07/2015	NORA Closeout	Save/Submit	Saved
NORA Outbreaks	Aurelia Osborn Fox Memorial Hospital	Form Id:132613 Report Date:07/22/2015	NORA Closeout	Save/Submit	Saved
NORA Outbreaks	Bellevue Hospital Center	Form Id:120665 Report Date:12/01/2014	NORA Closeout	Save/Submit	Saved
NORA Outbreaks	Boro Park Center for Rehabilitation and Healthcare	Form Id:126197 Report Date:02/25/2015	NORA Closeout	Save/Submit	Saved
NORA Outbreaks	Boro Park Center for Rehabilitation and Healthcare	Form Id:127523 Report Date:03/27/2015	NORA Closeout	Save/Submit	Saved

The 'System/Activity Messages' section shows a table of messages:

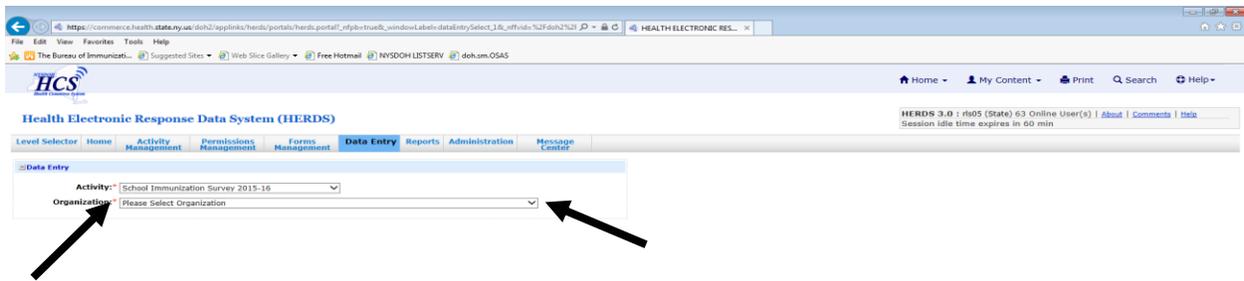
Message Type	Activity	Message Posted	Message
Survey	LHD L7-Drills	07/29/2015 12:23 PM	LHD L7-Drills
Survey	Review Tool for Designated Stroke Centers	01/30/2015 01:29 PM	Stroke Survey

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:

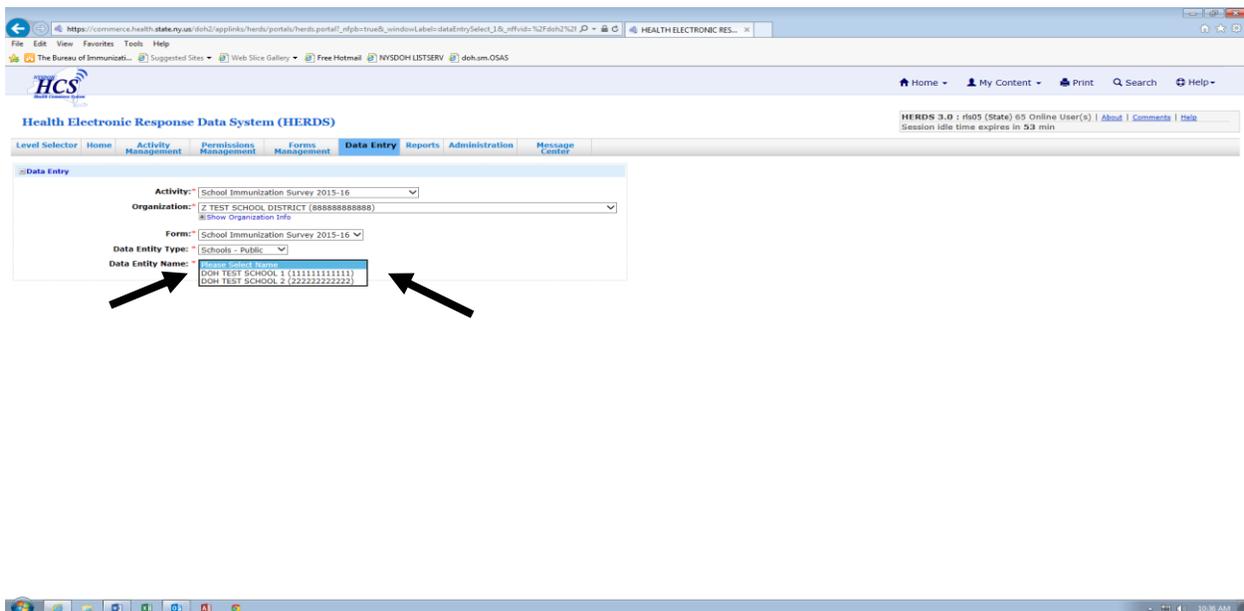
The screenshot shows the 'Data Entry' dropdown menu open. The list of activities includes:

- Day Care and Pre-K Immunization Survey 2015
- LHD L5-Medical Countermeasure Exercise Proposal
- LHD L7-Drills
- LHD Points of Distribution & Dispensing survey
- NORA Outbreaks
- NYC CSP Send-Receive Profile Sharing consent form
- NYC HES - Evacuating NHC
- NYC HES - Receiving NHC
- Review Tool for Coverdell Stroke Centers
- Review Tool for Designated Stroke Centers
- School Immunization Survey 2015-16**

- 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:



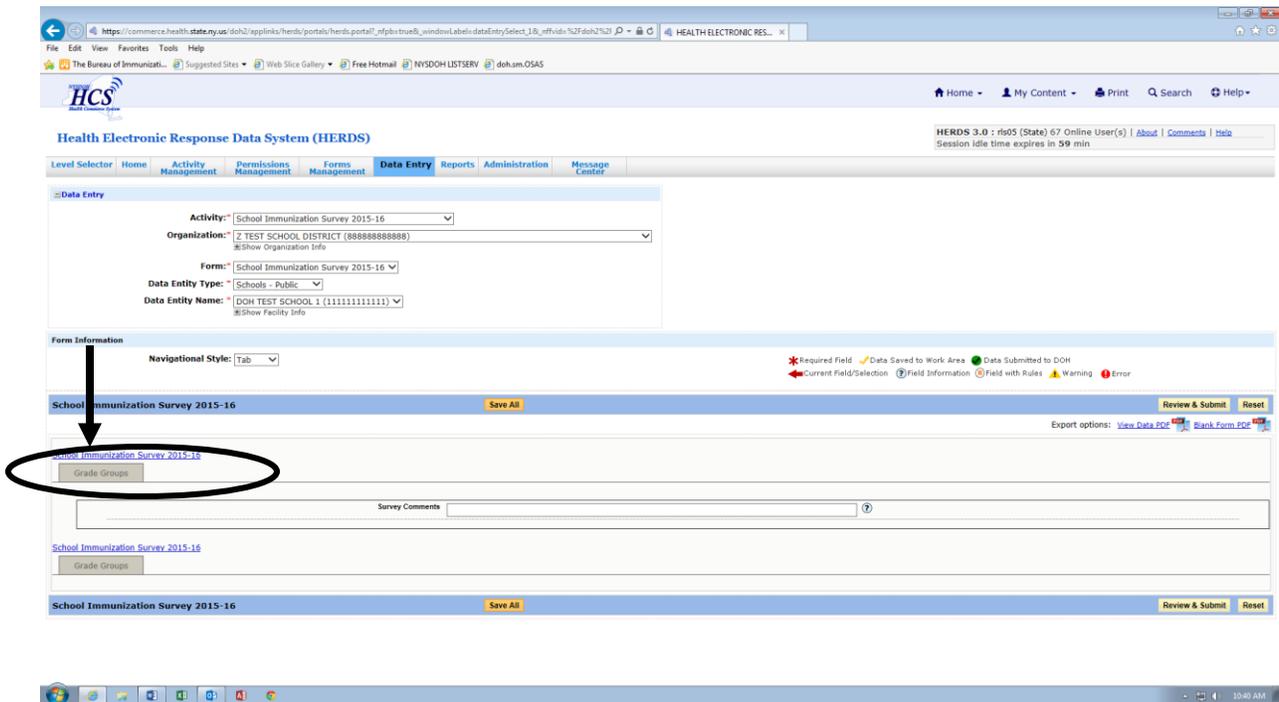
- 7) Click on **Show Organization Info** and **Show Facility Info** to see the address and phone number for the district and/or school:

The screenshot shows the HERDS Data Entry form for a School Immunization Survey 2015-16. The form is titled "School Immunization Survey 2015-16" and includes a "Save All" button and "Review & Submit" and "Reset" buttons. The form contains several dropdown menus: "Activity" (School Immunization Survey 2015-16), "Organization" (Z TEST SCHOOL DISTRICT (888888888888)), "Form" (School Immunization Survey 2015-16), "Data Entity Type" (Schools - Public), and "Data Entity Name" (DOH TEST SCHOOL 1 (11111111111111)). Below these dropdowns are two links: "Show Organization Info" and "Show Facility Info". The form also includes a "Form Information" section with a "Navigational Style" dropdown set to "Tab". The status bar at the bottom of the form includes icons for "Required Field", "Data Saved to Work Area", "Data Submitted to DOH", "Current Field/Selection", "Field Information", "Field with Rules", "Warning", and "Error".

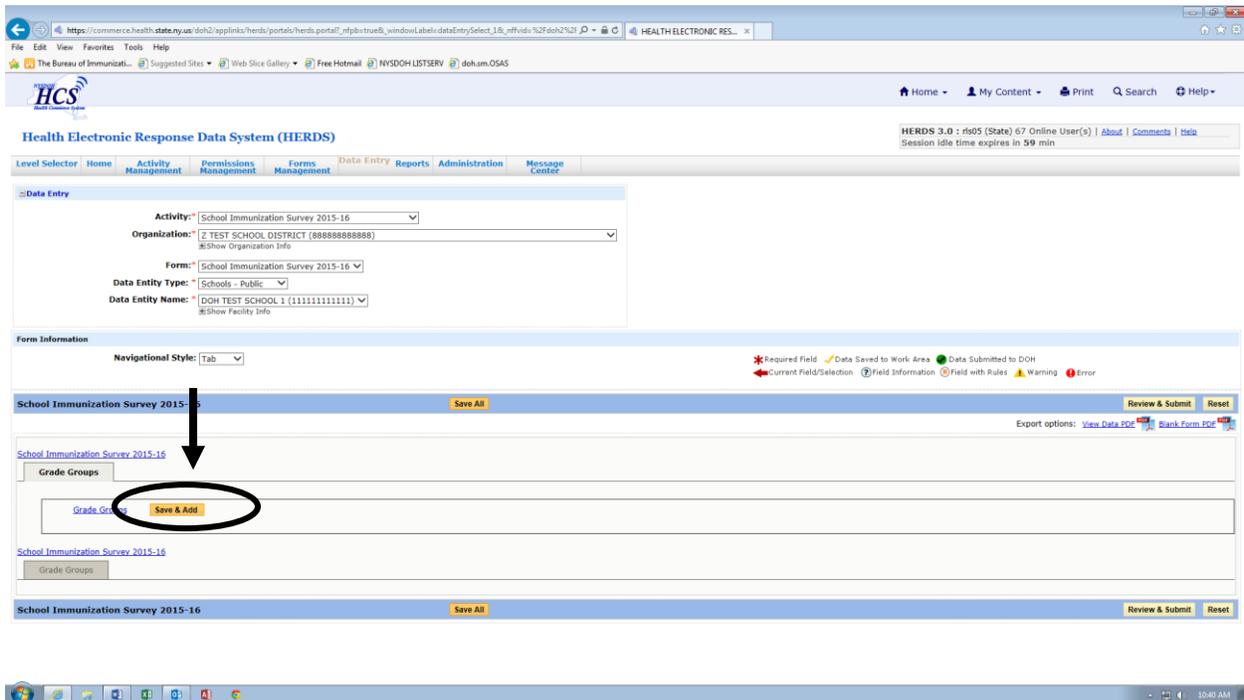
- 8) The district and/or school information will display:

The screenshot shows the HERDS Data Entry form with the "Organization" and "Data Entity Name" dropdowns expanded. The "Organization" dropdown shows the following information: Z TEST SCHOOL DISTRICT (888888888888), 800 North Pearl Street, Room 226, Albany, NY 12204, Country: Albany (001), Region: Capital District Regional Office, Ph: 518-473-9199, Fax: 518-473-1615. The "Data Entity Name" dropdown shows the following information: DOH TEST SCHOOL 1 (11111111111111), 800 North Pearl, Albany, NY 12204, Country: Albany (001), Region: Capital District Regional Office. The form also includes a "Form Information" section with a "Navigational Style" dropdown set to "Tab". The status bar at the bottom of the form includes icons for "Required Field", "Data Saved to Work Area", "Data Submitted to DOH", "Current Field/Selection", "Field Information", "Field with Rules", "Warning", and "Error".

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:

The screenshot shows the 'School Immunization Survey 2015-16' form. At the top, there are dropdown menus for 'Activity' (School Immunization Survey 2015-16), 'Organization' (Z TEST SCHOOL DISTRICT), 'Form' (School Immunization Survey 2015-16), 'Data Entity Type' (Schools - Public), and 'Data Entity Name' (DOH TEST SCHOOL 1). Below this is the 'Form Information' section with 'Navigational Style' set to 'Tab'. A status bar indicates 'Form Saved' and provides instructions: 'Once finalized, please remember to submit your data by clicking the Review & Submit button and then the Submit Data to DOH button.' The main section is 'Grade Groups', which contains a table with columns for 'Grade Groups', 'Save & Add', and 'Delete'. The first row is labeled '1. Grade Groups'. A dropdown menu is open over the 'Grade Groups' column, showing a list of options: 'Pre-K < 1 Year of Age', 'Pre-K > or = 1 Year of Age', 'Kindergarten', 'Grade 1', 'Grade 2', 'Grade 3', 'Grade 4', 'Grade 5', 'Grade 6', 'Grade 7', 'Grade 8', 'Grade 9', 'Grade 10', 'Grade 11', and 'Grade 12'. An arrow points to the dropdown menu.

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:

The screenshot shows the 'School Immunization Survey 2015-16' form with data entered for 'Grade 6'. The 'Grade Groups' section now shows a table with the following data:

Grade Groups	Save & Add	Delete
1. Grade Groups		
Grade Groups School Survey		
Grade 6		
Number of Children/Students Enrolled	100	
Number Children/Students Without Record	0	
Number with Medical Exemptions	0	
Number with Religious Exemptions	0	
Number with DTaP Vaccine (see instructions for vaccine type and # of doses required)	100	
Number with Polio-containing Vaccine (see instructions for # of doses)	100	
Number with Measles Vaccine (see instructions for # of doses)	100	
Number with Mumps Vaccine (see instructions for # of doses)	100	

The 'Save & Add' button is circled in black and labeled 'B'. A bracket on the right side of the data row is labeled 'A', with an arrow pointing to the 'Number of Children/Students Enrolled' field. The status bar at the top indicates 'Form Saved' and provides instructions: 'Once finalized, please remember to submit your data by clicking the Review & Submit button and then the Submit Data to DOH button.'

13) Once you have completed entering data for **all** your grade groups, click on **Save All**:

The screenshot shows the HERDS Data Entry page for a School Immunization Survey 2015-16. The 'Data Entry' section includes dropdown menus for Activity, Organization, Form, Data Entity Type, and Data Entity Name. Below this is the 'Form Information' section with a 'Navigational Style' dropdown. A red circle highlights the 'Save All' button in the top right corner of the form area. A black arrow points down to this button. Below the form, there is a table for 'Grade Groups' with columns for 'Grade Groups', 'Number of Children/Students Enrolled', 'Number of Children/Students Without Record', 'Number with Medical Exemptions', and 'Number with Religious Exemptions'. The table shows data for 'Grade 6'.

14) Click on **Review & Submit**:

This screenshot shows the same HERDS Data Entry page as above, but with the 'Review & Submit' button circled in red. A black arrow points down to this button. The 'Form Information' section now shows a green checkmark and the text 'Form Saved.' Below the form, there is a 'Survey Comments' text area. The 'Grade Groups' table is still visible at the bottom of the page.

15) Click on **Submit Data to DOH**:

The screenshot shows the HERDS interface for the 'School Immunization Survey 2015-16'. The 'Data Entry' section is active, and the 'Submit Data to DOH' button is circled in red with a black arrow pointing to it. The table below shows the survey data.

Section	Field	Value	Data Status	User	Updated
Grade Groups	Grade Groups School Survey (1)	Grade 6	saved	rs05	09/17/2015 10:48 AM
	Number of Children/Students Enrolled (1)	100	saved	rs05	09/17/2015 10:48 AM
	Number Children/Students Without Record (1)	0	saved	rs05	09/17/2015 10:48 AM
	Number with Medical Exemptions (1)	0	saved	rs05	09/17/2015 10:48 AM
	Number with Religious Exemptions (1)	0	saved	rs05	09/17/2015 10:48 AM
	Number with DTaP Vaccine (see instructions for vaccine type and # of doses required) (1)	100	saved	rs05	09/17/2015 10:48 AM
	Number with Polio-containing Vaccine (see instructions for # of doses) (1)	100	saved	rs05	09/17/2015 10:48 AM
	Number with Measles Vaccine (see instructions for # of doses) (1)	100	saved	rs05	09/17/2015 10:48 AM
	Number with Mumps Vaccine (see instructions for # of doses) (1)	100	saved	rs05	09/17/2015 10:48 AM
	Number with Rubella Vaccine (see instructions for # of doses) (1)	100	saved	rs05	09/17/2015 10:48 AM
	Number with Haemophilus influenzae type B (Hib) vaccine (see instructions for # of doses) (1)	100	saved	rs05	09/17/2015 10:48 AM
	Number with Hepatitis B Vaccine (see instructions for # of doses) (1)	100	saved	rs05	09/17/2015 10:48 AM

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

The screenshot shows the HERDS interface after the data submission. A green checkmark and the message 'Data have been submitted to DOH successfully' are circled in red with a black arrow pointing to it. The table below shows the survey data with the status updated to 'Submitted'.

Section	Field	Value	Data Status	User	Updated
Grade Groups	Grade Groups School Survey (1)	Grade 6	Submitted	rs05	09/17/2015 10:51 AM
	Number of Children/Students Enrolled (1)	100	Submitted	rs05	09/17/2015 10:51 AM
	Number Children/Students Without Record (1)	0	Submitted	rs05	09/17/2015 10:51 AM
	Number with Medical Exemptions (1)	0	Submitted	rs05	09/17/2015 10:51 AM
	Number with Religious Exemptions (1)	0	Submitted	rs05	09/17/2015 10:51 AM
	Number with DTaP Vaccine (see instructions for vaccine type and # of doses required) (1)	100	Submitted	rs05	09/17/2015 10:51 AM
	Number with Polio-containing Vaccine (see instructions for # of doses) (1)	100	Submitted	rs05	09/17/2015 10:51 AM
	Number with Measles Vaccine (see instructions for # of doses) (1)	100	Submitted	rs05	09/17/2015 10:51 AM
	Number with Mumps Vaccine (see instructions for # of doses) (1)	100	Submitted	rs05	09/17/2015 10:51 AM
	Number with Rubella Vaccine (see instructions for # of doses) (1)	100	Submitted	rs05	09/17/2015 10:51 AM