

# Instructions for Accessing and Completing the School Immunization Survey

Please log on to the Health Commerce System (HCS) at: <https://commerce.health.ny.gov>, to verify that your account is active. If you do not have an account, visit: [https://health.ny.gov/prevention/immunization/schools/docs/hcs\\_account\\_k12\\_form.pdf](https://health.ny.gov/prevention/immunization/schools/docs/hcs_account_k12_form.pdf)

NEW YORK STATE

Services News Government COVID-19

PLEASE LOGIN TO BEGIN USING THE HEALTH COMMERCE SYSTEM (HCS)

NEW YORK STATE Health Commerce System

User ID  
User ID  
This field is required.

Password  
Password

Forgot Your User ID or Password  Remember User ID

LOGIN

Don't Have An Account? [Sign Up Here](#)

- 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 the role of School Data Reporter for them to access the survey.
- Instructions for assigning a role are listed below. For help assigning a role, please contact Informatics at 518-473-1809.

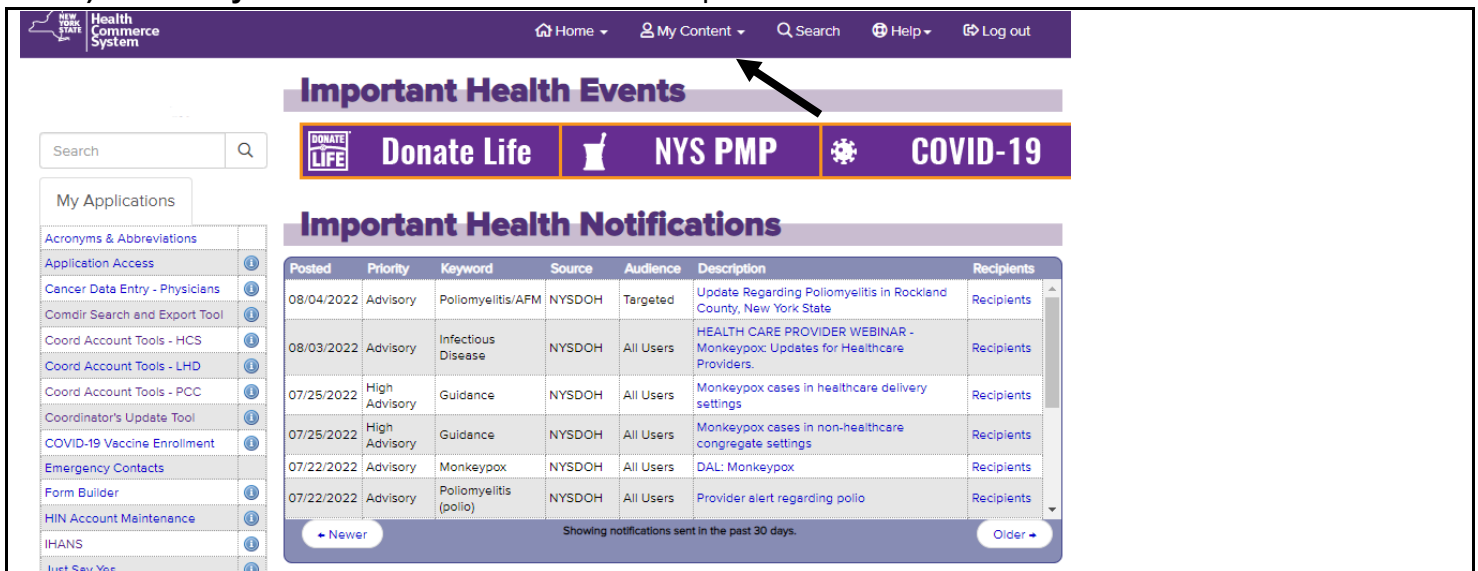
## Assigning Roles by the HCS Coordinator:

1. Log onto the HCS.
2. Click on **Coordinator's Update Tool** to the left of the screen.
3. **Choose Your Institution** and click on **Select**.
4. Click on **Manage Role Assignments**.
5. Click on **Modify** next to the role which you want to assign an individual.
6. A pop up list will be displayed of the individuals affiliated with your institution who have HCS accounts.
7. Check the box next to everyone you want to assign to the role of **School Data Reporter** 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 him or her 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 a HCS account and needs to submit the paperwork to receive one. [Add a User Account and Assign Role](#)
10. If you have just been assigned to a role and are unable to see the survey, you need to log off of 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 once.)

1) Go to: <https://commerce.health.ny.gov>.

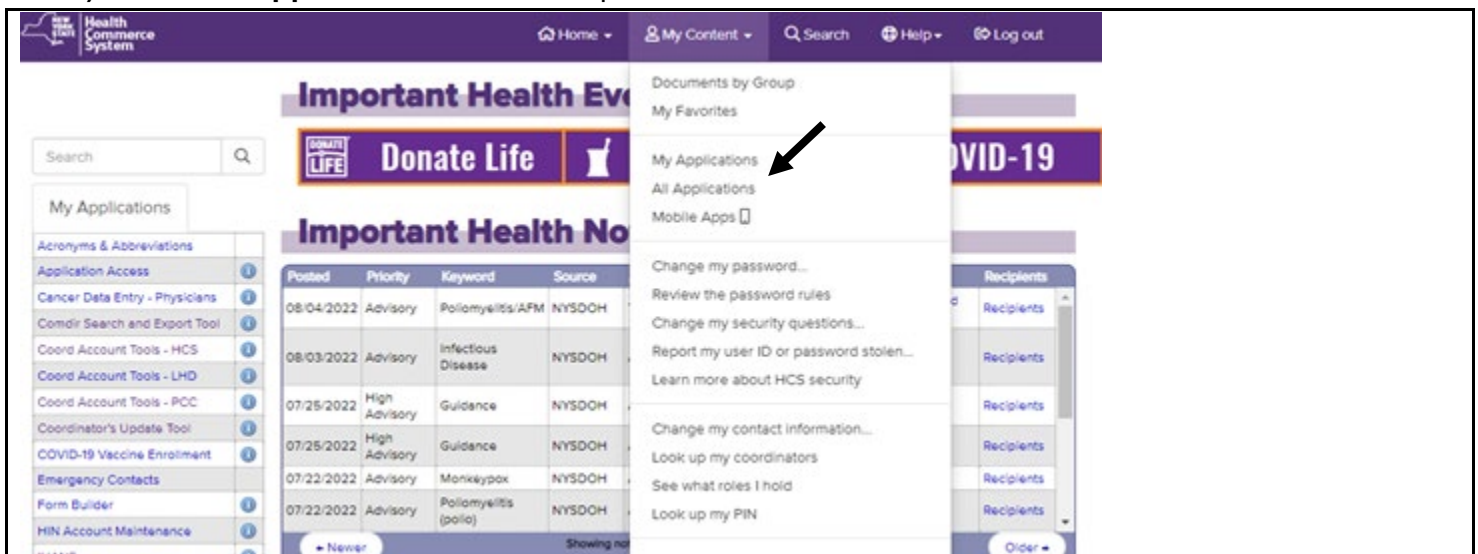
2) Select **My Content** on the menu bar at the top of the screen.



The screenshot shows the Health Commerce System homepage. At the top, there is a navigation bar with 'Home', 'My Content', 'Search', 'Help', and 'Log out'. Below the navigation bar, there are three main sections: 'Important Health Events', 'Donate Life', 'NYS PMP', and 'COVID-19'. The 'Important Health Notifications' section is highlighted with a black arrow pointing to the 'My Content' menu item. Below this, there is a table of notifications.

Posted	Priority	Keyword	Source	Audience	Description	Recipients
08/04/2022	Advisory	Polioyeitis/AFM	NYSDOH	Targeted	Update Regarding Poliomyelitis in Rockland County, New York State	Recipients
08/03/2022	Advisory	Infectious Disease	NYSDOH	All Users	HEALTH CARE PROVIDER WEBINAR - Monkeypox: Updates for Healthcare Providers.	Recipients
07/25/2022	High Advisory	Guidance	NYSDOH	All Users	Monkeypox cases in healthcare delivery settings	Recipients
07/25/2022	High Advisory	Guidance	NYSDOH	All Users	Monkeypox cases in non-healthcare congregate settings	Recipients
07/22/2022	Advisory	Monkeypox	NYSDOH	All Users	DAL: Monkeypox	Recipients
07/22/2022	Advisory	Poliomyelitis (polio)	NYSDOH	All Users	Provider alert regarding polio	Recipients

3) Select **All Applications** from the drop-down box.



The screenshot shows the Health Commerce System homepage with the 'My Applications' dropdown menu open. The dropdown menu is positioned over the 'Important Health Notifications' table. The menu items are: 'Documents by Group', 'My Favorites', 'My Applications', 'All Applications', and 'Mobile Apps'. A black arrow points to the 'All Applications' option.

4) Select **S** to locate the School Survey application from the list of HCS applications.

Health Commerce System Applications View Help

Browse by **A B C D E F G H I J K L M N O P Q R S T U V W X Y Z** View All

Application Name	Acronym	Profile	Restricted	Add/Remove
Safe Drinking Water Information System	SDWIS			
<b>School Survey (HERDS)</b>	HERDS			
Secure Collaboration				
Secure File Transfer 2.0	SFT 2.0			
ServNY	SERVNY		Yes	

5) Click on the **green and white plus icon** in the Add/Remove column.

Health Commerce System Applications View Help

Browse by **A B C D E F G H I J K L M N O P Q R S T U V W X Y Z** View All

Application Name	Acronym	Profile	Restricted	Add/Remove
Safe Drinking Water Information System	SDWIS			
<b>School Survey (HERDS)</b>	HERDS			
Secure Collaboration				
Secure File Transfer 2.0	SFT 2.0			
ServNY	SERVNY		Yes	

6) The **School Survey** link should now appear under **My Applications** in the menu to the left of your screen.

The screenshot shows a web application interface. On the left is a navigation menu with a search bar at the top. The menu items include: My Applications (circled), Acronyms & Abbreviations, Application Access, Cancer Data Entry - Physicians, Comdir Search and Export Tool, Coord Account Tools - HCS, Coord Account Tools - LHD, Coord Account Tools - PCC, Coordinator's Update Tool, COVID-19 Vaccine Enrollment, Emergency Contacts, Form Builder, HIN Account Maintenance, IHANS, Just Say Yes, NYSIS - Production, NYSIS - Training, and School Survey. The main content area has a purple header with 'DONATE LIFE', 'NYS PMP', and 'COVID-19' logos. Below the header is a section titled 'Important Health Notifications' with a table of notifications. At the bottom of the main content area is a section titled 'Newsroom Highlights...'.

Posted	Priority	Keyword	Source	Audience	Description	Recipients
08/04/2022	Advisory	Poliomyelitis/AFM	NYSDOH	Targeted	Update Regarding Poliomyelitis in Rockland County, New York State	Recipients
08/03/2022	Advisory	Infectious Disease	NYSDOH	All Users	HEALTH CARE PROVIDER WEBINAR - Monkeypox: Updates for Healthcare Providers.	Recipients
07/25/2022	High Advisory	Guidance	NYSDOH	All Users	Monkeypox cases in healthcare delivery settings	Recipients
07/25/2022	High Advisory	Guidance	NYSDOH	All Users	Monkeypox cases in non-healthcare congregate settings	Recipients
07/22/2022	Advisory	Monkeypox	NYSDOH	All Users	DAL: Monkeypox	Recipients
07/22/2022	Advisory	Poliomyelitis (polio)	NYSDOH	All Users	Provider alert regarding polio	Recipients

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):

Cancer Data Entry - Physicians	i
Comdir Search and Export Tool	i
Coord Account Tools - HCS	i
Coord Account Tools - LHD	i
Coord Account Tools - PCC	i
Coordinator's Update Tool	i
COVID-19 Vaccine Enrollment	i
Emergency Contacts	
Form Builder	i
HIN Account Maintenance	i
IHANS	i
Just Say Yes	i
NYSIS - Production	i
NYSIS - Training	i
<b>School Survey</b>	i

08/04/2022	Advisory	Poliomyelitis/AFM	NYSDOH	Targeted	Update Regarding Poliomyelitis in Rockland County, New York State	Recipients
08/03/2022	Advisory	Infectious Disease	NYSDOH	All Users	HEALTH CARE PROVIDER WEBINAR - Monkeypox: Updates for Healthcare Providers.	Recipients
07/25/2022	High Advisory	Guidance	NYSDOH	All Users	Monkeypox cases in healthcare delivery settings	Recipients
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07/22/2022	Advisory	Monkeypox	NYSDOH	All Users	DAL: Monkeypox	Recipients
07/22/2022	Advisory	Poliomyelitis (polio)	NYSDOH	All Users	Provider alert regarding polio	Recipients

Showing notifications sent in the past 30 days.

## Newsroom Highlights...

2) Click on **Data Entry**.

NEW YORK STATE Health Commerce System

Health Electronic Response Data System (HERDS) Home My Content Search Help Log out

Level Selector

- Home
- Activity Management
- Permission Profiles
- Forms Management
- Data Entry**
- Reports
- Admin
- Message Center

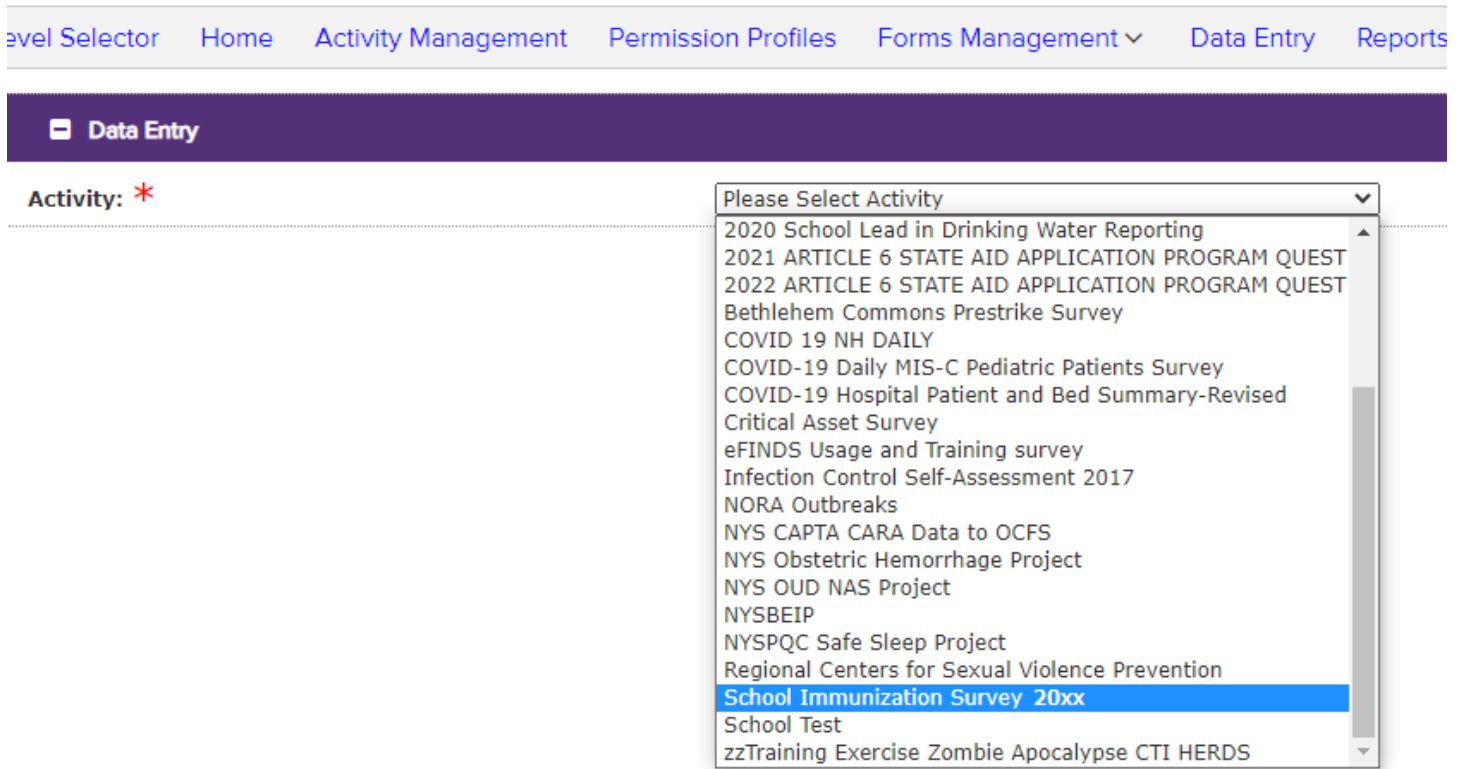
143 Online User(s)

To Do **★ General** Periodic

General Surveys

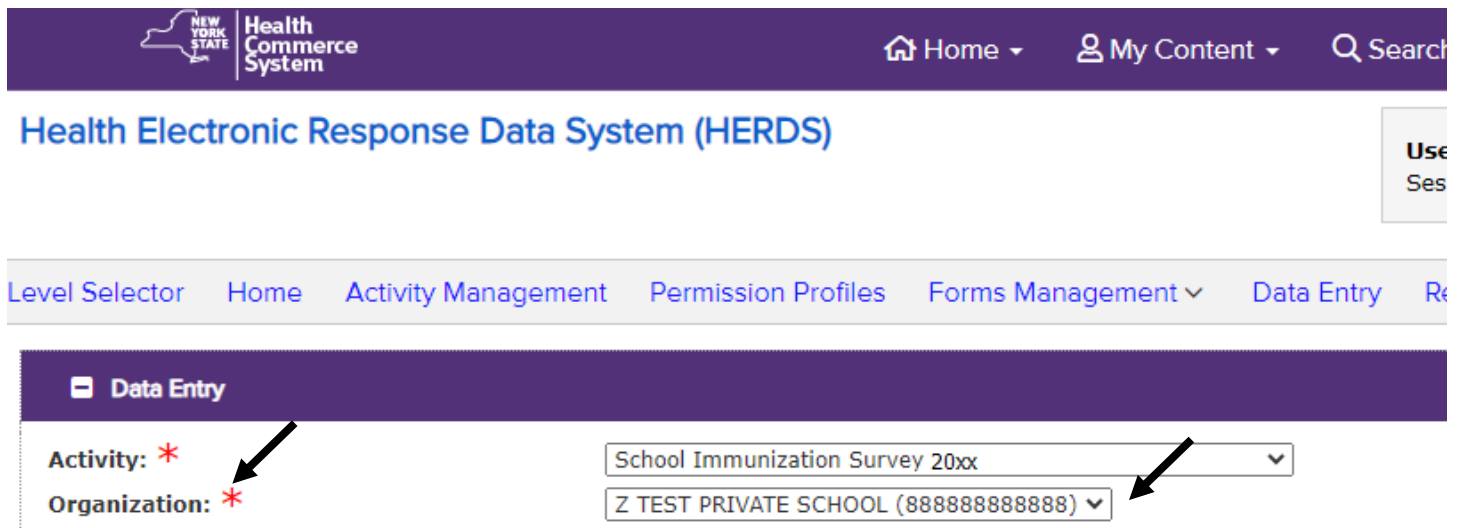
Activity	Reporting Organization	Data Entity Organization	Form	Permission	Completion Status
NORA Outbreaks	Aaron Manor Rehabilitation and Nursing Center	Form Id:325237 Report Date:04/16/2020	NORA Closeout	Save/Submit	Saved
NORA Outbreaks	Absolut Center For Nursing and Rehabilitation at Allegany, LLC	Form Id:381798 Report Date:09/26/2020	NORA Closeout	Save/Submit	Saved

- 3) Select **School Immunization Survey 20xx** (select current year survey) from the activity drop down box. If you are only assigned for the **School Immunization Survey 20xx**, the activity will be automatically selected for you:



The screenshot shows the top navigation bar with links: Level Selector, Home, Activity Management, Permission Profiles, Forms Management, Data Entry, and Reports. Below this is a purple header with a 'Data Entry' button. The main content area shows a form with a label 'Activity: \*' and a dropdown menu. The dropdown menu is open, displaying a list of activities. The 'School Immunization Survey 20xx' option is highlighted in blue. Other visible options include '2020 School Lead in Drinking Water Reporting', '2021 ARTICLE 6 STATE AID APPLICATION PROGRAM QUEST', '2022 ARTICLE 6 STATE AID APPLICATION PROGRAM QUEST', 'Bethlehem Commons Prestrike Survey', 'COVID 19 NH DAILY', 'COVID-19 Daily MIS-C Pediatric Patients Survey', 'COVID-19 Hospital Patient and Bed Summary-Revised', 'Critical Asset Survey', 'eFINDS Usage and Training survey', 'Infection Control Self-Assessment 2017', 'NORA Outbreaks', 'NYS CAPTA CARA Data to OCFS', 'NYS Obstetric Hemorrhage Project', 'NYS OUD NAS Project', 'NYSBEIP', 'NYSPQC Safe Sleep Project', 'Regional Centers for Sexual Violence Prevention', 'School Test', and 'zzTraining Exercise Zombie Apocalypse CTI HERDS'.

- 4) Select the appropriate facility from the **Organization** drop down box.



The screenshot shows the top navigation bar with the New York State Health Commerce System logo and links: Home, My Content, and Search. Below this is a purple header with a 'Data Entry' button. The main content area shows the title 'Health Electronic Response Data System (HERDS)'. Below the title is a navigation bar with links: Level Selector, Home, Activity Management, Permission Profiles, Forms Management, Data Entry, and Reports. The main content area shows a form with a label 'Activity: \*' and a dropdown menu. The dropdown menu is open, displaying a list of activities. The 'School Immunization Survey 20xx' option is highlighted in blue. Below the activity dropdown is a label 'Organization: \*' and a dropdown menu. The dropdown menu is open, displaying a list of organizations. The 'Z TEST PRIVATE SCHOOL (888888888888)' option is highlighted in blue. Two black arrows point to the 'Activity' and 'Organization' dropdown menus.

5) Click on **Show Organization Info** to confirm the school's name, address, and phone number.

The screenshot shows the top navigation bar with the New York State Health Commerce System logo and links for Home, My Content, Search, Help, and Log out. Below the navigation bar is the page title "Health Electronic Response Data System (HERDS)" and a user session indicator "it | Comments | Help 58 min". A secondary navigation bar contains links for Level Selector, Home, Activity Management, Permission Profiles, Forms Management, Data Entry, Reports, Admin, and Message Center. The main content area is titled "Data Entry" and contains several dropdown menus: Activity (School Immunization Survey 20xx), Organization (Z TEST PRIVATE SCHOOL (888888888888)), Form (School Immunization Survey 20xx), Data Entity Type (Schools - Private), and Data Entity Name (Z TEST PRIVATE SCHOOL (888888888888)). Below the Organization dropdown is a button labeled "Show Organization Info". An arrow points from the Organization dropdown to this button. Below the Data Entity Name dropdown is a button labeled "Show Facility Info".

The screenshot shows the "Form Information" section. On the left, "Navigational Style:" is followed by a dropdown menu set to "Section". On the right, there is a legend for field types: a red asterisk for "Required Field", a yellow lightning bolt for "Repeatable", a green checkmark for "Data Saved to Work Area", a green circle for "Data Submitted to DOH", a red arrow for "Current Field/Selection", a question mark for "Field Information", a red circle with an 'R' for "Field with Rules", a yellow triangle for "Warning", and a red exclamation mark for "Error". Below the legend are three buttons: "Data Entry" (highlighted in yellow), "Data", and "Data".

6) To begin the survey, click the 'Save & Add' button.

The screenshot shows the "Form Information" section with the "Navigational Style:" dropdown set to "Section". The legend for field types is the same as in the previous screenshot. Below the legend are three buttons: "Data Entry" (highlighted in yellow), "Data Review", and "Data Submission". Below these buttons is a purple bar with the text "School Immunization Survey 20xx" and three buttons: "Save All", "Review & Submit", and "Reset". Below this bar is a section for "Export options:" with links for "View Data PDF", "Blank Form PDF", and "Show/ Hide sections". Below the export options is a text area with the text "To begin the survey, click the 'Save & Add' button" and an arrow pointing to the "Save & Add" button. Below the text area are two buttons: "Save & Add" and "Delete All". Below the buttons is a "Survey Comments" section with a text input field and a question mark icon.

7) Select a Grade for School Survey from the **Select a value** drop down box

When you are finished saving, click the Review & Submit button to access the Data Review screen where you can submit your saved data.

Show/ Hide section

To begin the survey, click the 'Save & Add' button

Grades for School Survey

Save & Add

Delete All

1. Grades for School Survey

Delete

Grades for School Survey \*

Number of Children/Students Enrolled

Number Children/Students Without Record

Number with Medical Exemptions

Number with DTaP Vaccine (see instructions for vaccine type and # of doses required)

Number with Polio Vaccine (see instructions for # of doses)

Number with Measles Vaccine (see instructions for # of doses)

- Select a value
- Select a value
  - Pre-k/Day Care Less than 1 Year of Age
  - Pre-k/Day Care 1 Year of Age and Older
  - Kindergarten
  - Grade 1
  - Grade 2
  - Grade 3
  - Grade 4
  - Grade 5
  - Grade 6
  - Grade 7
  - Grade 8
  - Grade 9
  - Grade 10
  - Grade 11
  - Grade 12



8) Enter data for each grade and ensure the data is entered correctly, click on **Save & Add** again to add the next grade's school survey data. **Repeat steps 7 and 8 for each grade.**

**NOTE:** For Number of Children/Students Enrolled – includes students between two months and eighteen years of age.

To begin the survey, click the 'Save & Add' button

Grades for School Survey **Save & Add** **Delete All**

1. Grades for School Survey **Delete**

Grades for School Survey \* Kindergarten ? R

Number of Children/Students Enrolled	100	?
Number Children/Students Without Record	0	? R
Number with Medical Exemptions	0	? R
Number with DTaP Vaccine (see instructions for vaccine type and # of doses required)	98	? R
Number with Polio Vaccine (see instructions for # of doses)	98	? R
Number with Measles Vaccine (see instructions for # of doses)	98	? R
Number with Mumps Vaccine (see instructions for # of doses)	98	? R
Number with Rubella Vaccine (see instructions for # of doses)	98	? R
Number with Haemophilus influenzae type B (Hib) vaccine (see instructions for # of doses)		? R
Number with Hepatitis B Vaccine (see instructions for # of doses)	98	? R
Number with Varicella vaccine (see instructions for # of doses)	98	? R
Number with Pneumococcal Vaccine refer to PCV chart for # of doses		? R
Number with Tdap Booster 1 dose (see instructions)		? R
Number with Meningococcal Vaccine (see instructions for # of doses)		? R
Number Completely Immunized (see instructions)	98	? R
Number Children/Students In Process (see instructions)	2	? R

- 9) Ensure the “Completely Immunize” box is completed for those completely immunized for the grade level. Once you have completed entering data for **all** your grade groups, click on **Save All**.

School Immunization Survey 20xx Save All Review & Submit Reset

Export options: View Data PDF Blank Form PDF

When you are finished saving, click the Review & Submit button to access the Data Review screen where you can submit your saved data.

Show/ Hide sections

To begin the survey, click the 'Save & Add' button

Grades for School Survey Save & Add Delete All

1. Grades for School Survey Delete

Grades for School Survey *	Kindergarten	?	R
Number of Children/Students Enrolled	100	?	
Number Children/Students Without Record	0	?	R
Number with Medical Exemptions	0	?	R

- 10) Click **Review & Submit** at the top or bottom of the screen

School Immunization Survey 20xx Save All Review & Submit Reset

Export options: View Data PDF Blank Form PDF

When you are finished saving, click the Review & Submit button to access the Data Review screen where you can submit your saved data.

Show/ Hide sections

To begin the survey, click the 'Save & Add' button

Grades for School Survey Save & Add Delete All

1. Grades for School Survey Delete

Grades for School Survey *	Kindergarten	?	R
Number of Children/Students Enrolled	100	?	
Number Children/Students Without Record	0	?	R
Number with Medical Exemptions	0	?	R

School Immunization Survey 20xx Save All Review & Submit Reset

10) Review the data, once satisfied that it is accurate, click **Submit Data** at the top or bottom of the screen.

Data Entry
Data Review
Data Submission

School Immunization Survey 20xx
Enter or Modify Data
Submit Data
Exp

ⓘ After reviewing your data below, please click the Submit Data button to submit your data.

Section	Field	Value	Data Status
Grades for School Survey	Grades for School Survey .(f). *	Kindergarten	saved
	Number of Children/Students Enrolled .(f).	100	saved
	Number Children/Students Without Record .(f).	0	saved
	Number with Medical Exemptions .(f).	0	saved
	Number with DTaP Vaccine (see instructions for vaccine type and # of doses required) .(f).	98	saved
	Number with Polio Vaccine (see instructions for # of doses) .(f).	98	saved
	Number with Measles Vaccine (see instructions for # of doses) .(f).	98	saved
	Number with Mumps Vaccine (see instructions for # of doses) .(f).	98	saved
	Number with Rubella Vaccine (see instructions for # of doses) .(f).	98	saved
	Number with Haemophilus influenzae type B (Hib) vaccine (see instructions for # of doses)		

School Immunization Survey 20xx
Enter or Modify Data
Submit Data

11) You will receive the **Data has been submitted successfully** message. You have completed the survey process.

The screenshot shows the 'Data Submission' step of the 'School Immunization Survey 20xx'. The interface includes buttons for 'Enter or Modify Data' and 'Submit Data'. A green checkmark and the message 'Data has been submitted successfully.' are displayed, circled in black with an arrow pointing to it. Below the message is a table with the following data:

Section	Field	Value	Data Status	User
Grades for School Survey	Grades for School Survey .(f). *	Kindergarten	Submitted	C
	Number of Children/Students Enrolled .(f).	100	Submitted	C
	Number Children/Students Without Record .(f).	0	Submitted	C
	Number with Medical Exemptions .(f).	0	Submitted	C
	Number with DTaP Vaccine (see instructions for vaccine type and # of doses required) .(f).	98	Submitted	C
	Number with Polio Vaccine (see instructions for # of doses) .(f).	98	Submitted	C
	Number with Measles Vaccine (see instructions for # of doses) .(f).	98	Submitted	C