Health Commerce System Account Access and Management

Requirements for reporting in the HERDS reporting application on Health Commerce System (HCS)

Schools must report the required information using the NYS DOH's statewide electronic reporting application called HERDS accessed through the NYS Health Commerce System (HCS), a secure online communications system. In HERDs, there is one form to complete for the 2023-2025 compliance period. The form asks for general information, such as the status, sampling information, lead results, and remediation. The information provided is made available to the public on Health Data NY (https://health.data.ny.gov/). The data displayed on Health Data NY is updated daily.

How To Get Started

Identify who your HCS Coordinator(s) is for your school building. **HCS Coordinators hold key roles in this process**. Typically, an HCS Coordinator is a school nurse, but other school officials can be an HCS Coordinator.

Only individuals who have been *assigned* the **"Lead Testing in School Drinking Water Reporter" role** in the Health Commerce System (HCS) will be able to access the HERDS reporting form and report the lead data in the electronic reporting application to the state. Role assignments can only be done by a school's **HCS Coordinator. Role assignments must be done for each building that will be reporting lead test results. It is not done on a "District level" basis**.

Individuals that will be responsible for reporting school lead in drinking water information into HCS/HERDS must complete the following steps:

1. **Have or create an HCS Account**

   - If the school representative already has an HCS account for each school building that they will be reporting data for, skip to step 2.

   - If a school representative responsible for reporting does not have an account, they need to do the following steps (refer to Figure 1 for the instructions);

      i. **Register for an HCS Account**. (Refer to Section A in Figure 1).

      ii. **Have an HCS Coordinator** at the school finalize the new user's account (Section B in Figure 1).

      iii. The new user must then successfully sign into HCS to verify the account is fully registered (Section C in Figure 1).

2. Your HCS Coordinator will then have to **assign the "School Lead in Drinking Water Reporter"** role to you in HCS for each school building you will be reporting data for (Refer to Figure 2 for the step-by-step instructions.)

   ### Notes for HCS Coordinators:

- The role only exists at the "facility" (school) level, the "District" level.

- HCS users can be assigned this role to one or more schools in a district, however, assignments must be done by the HCS Coordinator for each individual school building where data will be reported.

- If desired, multiple people can be assigned this role for each school building.

- Only HCS Coordinators can add or *DELETE* an account. If staff leave a school's organization, only the HCS Coordinator(s) have the ability to remove that account from HCS. NYS DOH staff cannot change an account's status. Figure 3 and Figure 4 show detailed instructions for an HCS Coordinator to delete an HCS account and add a new Coordinator/Security Coordinator, respectively.

3. Once the role has been assigned, you will be able to login to HCS/HERDS and report your data. For assistance in accessing the HERDS refer to Appendix G: **How to Access the 2023-2025 HERDS Reporting Form on Health Commerce System**

New HCS User Account

Need a Health Commerce System (HCS) account? Follow these steps (Register only once):

A. Create your unique User ID and set up Security Questions.
B. Go to your HCS Coordinator with your user ID and valid photo ID for verification.
C. Set your password and login.

FIRST—The New User will...

A. Create User ID & Set Up Security Questions

1. Go to https://commerce.health.state.ny.us
2. Click **Sign Up Here**
3. Click **No** (I am not a licensed medical professional)
4. Click '**Click here to Register for an account**'
5. Create/Enter a unique User ID
6. Enter your First Name, Last Name and Email Address
   NOTE: Name is same as it is on your Photo ID
7. Click **Security and Use Policy (SAUP)** link and review
8. Check the box to confirm you read and understand the Security and Use Policy (SAUP)
9. Check "I'm not a robot" and complete CAPTCHA
10. Click **Continue**
11. Answer at least six Security Questions and click **Save**
12. Confirm: Step 1 Success message

   You will receive two emails from camu@health.ny.gov:
   "HCS Self Registration Account Created for <user ID>" and
   "HCS security questions and answers have been changed for <user ID>."
   Check junk mail if not received.

13. **Go to your organization's HCS coordinator** with your <user ID> and a valid photo ID e.g. NYS DMV Driver's License, NYS DMV Non-driver Photo ID, Passport, Unexpired Foreign Passport, US Driver's license (out-of-state users), etc.

SECOND—The HCS Coordinator will...

B. Affiliate you with the organization

1. Login the HCS
2. Click **Coord Account Tools - HCS** under My Applications
3. Scroll down to **Request an account for a... User**
4. Click **User**
5. Select your organization from the list
6. Enter the user's HCS ID and click **Next**
   NOTE: Confirmation of user ID created was sent to the user via email with subject "HCS Self Registration Account Created for <user ID>"
7. Select option: **NYS Photo ID** or **Non NYS Photo ID**
   NOTE: The information must match exactly. If the ID is not a NYS driver license, please enter the **out-of-state ID** number in the Comments field.
8. Complete user's information based on photo ID and click **Next**
9. Enter the user's business contact information and click **Submit**
10. Confirm confirmation message "**Registration Success**" displays
11. Instruct the *newly* enrolled user to look for "Congratulations! You are enrolled on the HCS" email. This contains their link to set their password. *Existing users do not need to reset password.*

User Sets Password & Logs in...

C. Set your password upon receipt of "Congratulations! You are enrolled on the Health Commerce System (HCS)" email:

1. Click the link in your email Note: Only newly enrolled users will receive an email; existing users will not.
2. Enter your user ID
3. Check "I'm not a robot" and complete the CAPTCHA
4. Click **Continue**
5. From the Forgot your Password? screen, click one option e.g. Reset my password using my NYS Driver License or NYS Non-Driver Photo ID or for out-of-state users: Reset my password using my security question answers
6. **Login** to HCS.

* If you do not know your HCS Coordinator, please call the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 1 (M-F 8am-4:45pm)   Revised July 2022

Figure 1. Instructions for a School Representative to Register for an HCS Account (new user)

How To Assign Roles

Roles are used to identify staff, send targeted notifications, and grant access to role-based applications.
Roles are managed by the organization's HCS Coordinator.

Coordinator Steps to Assign a Role

1. Click **Coordinator's Update Tool**
2. Select the appropriate organization
3. Click **Select**
4. Click **Manage Role Assignments** (blue tab)
5. Click the **Modify** link located to right of a role name
6. Locate the option to Add Role Assignment
7. Select checkbox corresponding to user ID
8. Click **Add Role Assignment**

OR

7. Search for user by Last Name
8. Click **Submit**
9. Select the person from the list with a valid user ID
10. Click **Add Role Assignment**.
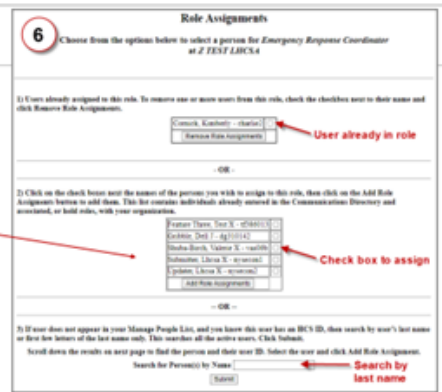
Remove User from Role

1. Click **Coordinator's Update Tool**
2. Select your organization > Click **Select**
3. Click **Manage Role Assignments**
4. Click **Modify** to the right of the role name
5. Check the box next to the name of the user you wish to remove from the role
6. Click **Remove Role Assignments**.

Review Role Report

1. Go to https://commerce.health.state.ny.us
2. Click **Coordinator's Update Tool** from **My Applications** (left side panel)
3. Select your organization > Click **Select**
4. Select **Reports**
5. Select **Get Role Report**
6. **View** or **Download** report
7. As needed, proceed to **Remove User from Role** (instructions are below) or **Delete User** (right)
8. Click **Data Verified** when Manage People list and Role Report are up to date.

* If you need assistance with roles or accounts, please call the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 2 (M-F 8am-4:45pm)   June 2022

Figure 2. Instructions for a School's HCS Coordinator to Assign a Role to Responsible Individuals (e.g., Lead Testing in School Drinking Water Reporter)

Delete HCS User Account

Who is responsible for deleting an account?
The Health Commerce System (HCS) Coordinator at the user's organization.

Why do I delete an account?
To uphold the integrity of the HCS and prevent security breaches.

When do I delete an account?
When the user is no longer employed at your organization or the user had a change in jobs within the organization and no longer requires HCS access.

What happens when an account is deleted?
Immediately upon clicking **Delete User**, the account will be end-dated for your organization and the user will
- be removed from your organization's Communications Directory roles
- be removed from your organization's Manage People list, &
- no longer be able to access the HCS.

CAUTION: Deleting an account cannot be undone. Account deletion is immediate and permanent. If an account is deleted in error, a new account request must be completed to restore access to the Health Commerce System.

How do I know what users I manage?
A Coordinator manages users and roles for their organization.

To see who is affiliated with your organization:
1. Click the **Coordinator's Update Tool** from My Applications
2. Select your organization (if it is not already selected)
3. Click **Reports**
4. Click **Get Role Report**
5. Scroll down table and view all roles
6. Click Download link at bottom of results/page
7. Click Data Verified at bottom of page when info is correct.

How do I delete an account?
1. Click the **Coordinator's Update Tool** in My Applications
2. Select your organization (if it is not already selected)
3. Click **Select**
4. Click **Manage People**
5. Click the user's name link
6. Click **Delete Account.**

Coordinator's Update Tool

| Manage People | Update Contact Info | Manage Role Assignments | Delete Account | Request Account | Verify Trust Level |

Person Update Tool for HCS User's Name

The information in this section comes from the user's account profile and can only be changed by CAMU - please call **866-529-1890**
First Name :   Middle Name :   Last Name :   HCS User ID :
Primary Organization :

What if I see 'No account on file' next to a name?

| Test, Test | No account on file |

This means that only contact information exists for this person, and they do not have an HCS user ID with your organization.

1. Click the name
2. Click **Delete Account**
3. Click **Remove User from Manage People List.**

What if I do not see a user in my Manage People list?
If you do not see user in Manage People, then their user ID may exists with another organization. It does not mean that the user does not have any roles in your organization, so always check your Role Report.

To Remove User from Role:
1. Click **Manage Role Assignments**
2. Click Modify to right of **Role Description**
3. Check box next to name of user
4. Click **Remove Role Assignments.**

Figure 3.   Instructions for a School's HCS Coordinator to Delete an HCS User Account

New Coordinator _or_ Security Coordinator

Important: You must be an existing Coordinator to create either a new Coordinator or Security Coordinator account. A **Coordinator** manages user accounts and roles. A **Security Coordinator (SC)** manages the Automated File Transfer (AFT) accounts. The SC is by default a Coordinator and not all organizations need an SC. **BEFORE** creating a Coordinator or SC account, the person must be an existing user or have created a new user ID. All users have accepted the Security and Use Policy and set up their six security questions. If the person does not have a user ID, then they should go to HCS login page and click **Don't Have An Account? Sign Up Here**.

1. Click **Coord Account Tools—HCS** or **Coord Account Tools— LHD** (Local/County Health Dept) from **My Applications** list.
2. Select **Coordinator** or **Security Coordinator** link from the **Request an account for a**... table.
3. Select the **Organization/Type/Primary ID (e.g. PFI)** you are adding the Coordinator to.
4. Enter person's **HCS ID**. If they do not have one, then follow instructions to create a **New HCS user account** .
5. Select either **Coordinator** or **Security Coordinator** option.
6. Click **Next.**
7. Confirm message, "*Are you sure you want to request a new Coordinator account or new Security Coordinator account?*"
7. Select option: **NYS Photo ID** or **Non NYS Photo ID**
   NOTE: The information must match exactly. If the ID is not a NYS driver license, please enter the **out-of-state ID** number in the Comments field.
8. Complete user's information based on photo ID and click **Next**
9. Enter the user's business contact information and click **Submit**
10. Confirm confirmation message "**Registration Success**" displays
11. Instruct the *new* Coordinator to look for "Congratulations! You are enrolled on the HCS" email. This email contains their link to set their password (if new Coordinator is also a new user) and to review the Organizational Security and Use Policy.

If the new Coordinator or SC is also a new user, then they will receive three confirmation emails: (**1**) HCS Self Registration Account Created for <userID>, (**2**) HCS Security Questions and answers have been changed and (**3**) Congratulations! You are enrolled on the HCS.

If user did not create a User ID or you typed it incorrectly, then you will receive this message: This HCS ID does not exist. Please check if the ID entered is correct. If needed, please confirm if the user registered for the account before requesting the Coordinator or Security Coordinator access.

Beginning 2023: NYS Assembly Bill enacts the "Gender Recognition Act." New Yorkers can update all State forms with a gender-neutral 'X' (non-binary) designation.

If new Coordinator, is also a new user, then they need to set their password, review the **User Security and Use Policy** and the **Organizational Security and Use Policy** before logging in:
1. Click the top link in the Congratulations email
2. Enter user ID
3. Check "I'm not a robot" and complete the CAPTCHA
4. Click **Continue**
5. From the Forgot your Password? screen, click one option e.g. Reset my password using my NYS Driver License or NYS Non-Driver Photo ID or out-of-state users: Reset my password using my security question answers
6. Enter user ID and NYS DMV or security questions info, etc. and **Login** to HCS.

If you cannot find the assistance you need, please call Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 1 (M-F 8am-4:45pm)   Nov 2022

Figure 4.   Instructions for a School's HCS Coordinator add a New Coordinator or a Security Coordinator