

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.

A screenshot of the Health Commerce System (HCS) login interface. The form is enclosed in a rounded rectangle with a light gray border. At the top, it says "User ID" above a text input field containing the placeholder "User ID". Below that, it says "Password" above a password input field with a single asterisk as a placeholder and a small eye icon to toggle visibility. Under the password field, there is a link "Forgot Your User ID or Password" and a checkbox labeled "Remember User ID". A large purple button with the word "LOGIN" in white capital letters is centered below the input fields. At the bottom of the form, there are two links: "Don't Have An Account? Sign Up Here" and "Having trouble logging in? Report a problem here".

Enter your user ID and Password in the appropriate boxes and **LOGIN** if you have an account.

If you're unable to login, go to the next page for HCS Account Maintenance.

If you already have an account in HCS and can log in without any issues, skip to [Accessing the School Immunization Survey](#) (page 8).

HCS Account Maintenance

If you're unable to log in, check with the HCS Coordinator for your organization.

If you need to create a new user account, click [Sign Up Here](#).

A login form for the Health Commerce System. It has a rounded rectangular border. At the top, it says "User ID" above a text input field containing the placeholder "User ID". Below that, it says "Password" above a password input field with a single dot as a placeholder and a small eye icon to toggle visibility. Under the password field, there is a link "Forgot Your User ID or Password" and a checkbox labeled "Remember User ID". A large purple button with the text "LOGIN" is centered below the inputs. At the bottom, there is a line of text: "Don't Have An Account? [Sign Up Here](#)". The "Sign Up Here" link is circled in red. Below this, it says "Having trouble logging in? [Report a problem here](#)".

The hyperlink will prompt this initial question:

A form titled "Create an Account" with a white background and a gray border. The title is in bold. Below the title, the question "Do you hold a healthcare professional license issued by the New York State Department of Education?" is displayed. At the bottom, there are three purple buttons labeled "Yes", "No", and "Cancel" in white text. Below the buttons, the word "Password" is partially visible, suggesting the next step in the registration process.

Answer as appropriate, which will bring you to the applicable registration screen.

Click this hyperlink to show you how the two-step process works:

[New HCS Account \(ny.gov\)](https://commerce.health.state.ny.us)



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.

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**
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 Non NYS ID Value field.
8. Complete user's information based on photo ID and click **Next**
9. Enter the user's business contact information and click **Submit**. Confirm confirmation message "**Registration Success**" displays
10. 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.*

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 do not hold a healthcare professional license issued by the NYS Department of Education)
4. **Click here to register for an account (for non medical professionals)**
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 the **User Security and Use Policy** link and review
8. Check the box to confirm you read and understand the Security and Use Policy
9. Click **Continue**
10. Answer six (6) Security Questions and click **Save**
11. 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.
12. **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.

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. Click **Continue**
4. 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](#)
5. Enter your user ID and NYS DMV or security questions info, etc. and **Login** to HCS.

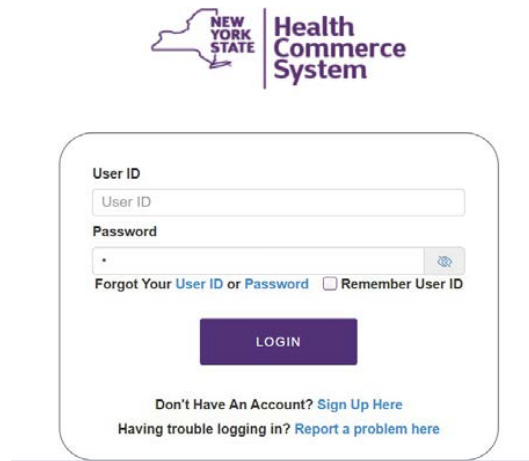
* If you do not know your HCS Coordinator, please call the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 1 (M-F 8am-4:45pm) Revised Oct 2023

Your job as a new user is to set up a new user account.

Once your new user account is set up, it's up to the HCS Coordinator to request your account to be activated and assign your role or roles.

Assigning Roles by the HCS Coordinator:

Log onto the HCS. <https://commerce.health.ny.gov/>



The image shows the login page for the New York State Health Commerce System. At the top, there is a logo for the New York State Health Commerce System. Below the logo is a login form with the following fields and options:

- User ID**: A text input field with the placeholder text "User ID".
- Password**: A password input field with a toggle for visibility.
- Forgot Your User ID or Password**: A link to the forgot password page.
- Remember User ID**: A checkbox to remember the user ID.
- LOGIN**: A purple button to submit the login information.
- Don't Have An Account? Sign Up Here**: A link to the sign up page.
- Having trouble logging in? Report a problem here**: A link to report a problem.

Enter your user ID and Password in the appropriate boxes and **LOGIN**.

Find the Coordinator's Update Tool within My Applications.

My Applications

Acronyms & Abbreviations	
Application Access	1
Comdir Search and Export Tool	1
Coord Account Tools -HCS	1
Coord Account Tools -PCC	1
Coordinator's Update Tool	1
Form Builder	1
HERDS	1
HIN Account Maintenance	1
IHANS	1
MFA Management	1
NYSIIS - Production	1
NYSIIS - Training	1
PERDS	1
Secure File Transfer	1
ServNY	1
SMART	1

The next screen you will see looks like the image below:

Coordinator's Update Tool

Main Menu

Please select an organization for which you are a coordinator

☐ [Your Institution]

Select

- OR -

Please select a proxy organization for which you are a coordinator

☐ Emergency Volunteers - County
☐ Fire Districts
☐ Multi-County Coordinated Applications
☐ Account access - Limited
☐ EMS Services
☐ Early Intervention Provider

Select

Send questions or comments to [Communications Directory Help](#)

name.
Step 4

Choose Your Institution and click Select.

Please select an organization for which you are a coordinator

☒ [Your Institution]

Select

Click the Manage Role Assignments tab.

Coordinator's Update Tool

Main Page

Location

Manage People

Organizational Offices

Manage Role Assignments

Reports

Add a New Person

Special Accounts

Form Name:

Location Information for *NYSDOH Center for Community Health*

Primary ID: 6307	Secondary ID: NYSDOH	Org Type: NYSDOH CCH
Name	NYSDOH Center for Community Health	
*Addr. Line 1	Corning Tower, 1415	
Addr. Line 2	Empire State Plaza	
*Town or City	Albany	Albany County Not NYS Albany
*State or Province	NY	*Country USA
Postal Code	12237	
Phone	518-402-5382	Fax 518-486-1455
Changed On	04/05/2022	Changed By rxs14 * required field(s)

Modify Reset

This will generate a list of roles for your organization. Clicking the role title will provide a description of that role.
Click Modify to add or remove role assignments.

Coordinator's Update Tool

Main Page
Location
Manage People
Organizational Offices
Manage Role Assignments
Reports
Add a New Person

Form Name:
Role Assignments

Select a Role to Assign/Modify
for *NTSDOH Center for Community Health*

Role Description	Person in Role?	Modify Role Assignments	Role Description	Person in Role?	Modify Role Assignments
CCH Director	No	Modify	CCH Finance Chief	No	Modify
CCH Logistics Chief	No	Modify	CCH Operations Chief	No	Modify
CCH/DCDPAH Logistics Chief	Yes	Modify	CCH/DCDPAH Operations Chief	Yes	Modify
CCH/DEPI Logistics Chief	No	Modify	CCH/DEPI Operations Chief	No	Modify
CCH/DFH Finance Chief	No	Modify	CCH/DFH Logistics Chief	No	Modify
CCH/DFH Operations Chief	No	Modify	CCH/DON Finance Chief	Yes	Modify
CCH/DON Logistics Chief	No	Modify	CCH/DON Logistics Chief, Alternate	No	Modify
CCH/DON Operations Chief	No	Modify	CCH/DON Operations Chief, Alternate	Yes	Modify
CCH/OIT Logistics Chief	No	Modify	CCH/OIT Operations Chief	No	Modify
CCH/OMH Logistics Chief	No	Modify	CCH/OMH Operations Chief	No	Modify
CCH/OPHP Finance Chief	Yes	Modify	CCH/OPHP Logistics Chief	No	Modify

Role Assignments

Choose from the options below to select a person for *School Survey Manager*
at *NTSDOH Center for Community Health*

To remove one or more users from this role, check next to their name and click Remove Role Assignments.

- 1) Users already assigned to this role. To remove one or more users from this role, check the checkbox next to their name and click Remove Role Assignments.

☐

Remove Role Assignments

To assign users to this role, select names from the list, then click on the Add Role Assignments button to add them (use ctrl-left click for multiple selections or to unselect).

- 2) Select names from the drop down list of the persons you wish to assign to this role, then click on the Add Role Assignments button to add them (Use Ctrl/left click for multiple selections or to unselect). Avoid assigning a role to a "na" account. This does not give user any permissions.

Note: This list is limited to the users in your Manage People, that is, users with a primary organization of this facility or agency.

Sample A, Test – abc01
 Sample B, Test – abc02
 Sample C, Test – abc03
 Sample D, Test – abc04
 Sample E, Test – abc05
 Sample F, Test – abc06
 Sample G, Test – abc07
 Sample H, Test – abc08

Add Role Assignments

NOTES: This list is limited to the users in your Manage People, that is, users with a primary organization of this facility or agency. Avoid assigning a role to an "N/A" account. This does not give users any permissions.

If a user does not appear in your Manage People List and you know this user has an HCS ID, then search by user's last name or first few letters of the last name only. This will search all active users. Click Submit and then scroll down the results on the next page to find the person and their user ID. Select the user and click Add Role Assignment.

Search for Person(s) by Name

If your account is not active, contact CAMU (Commerce Account Management Unit) at 1-866-529-1890.

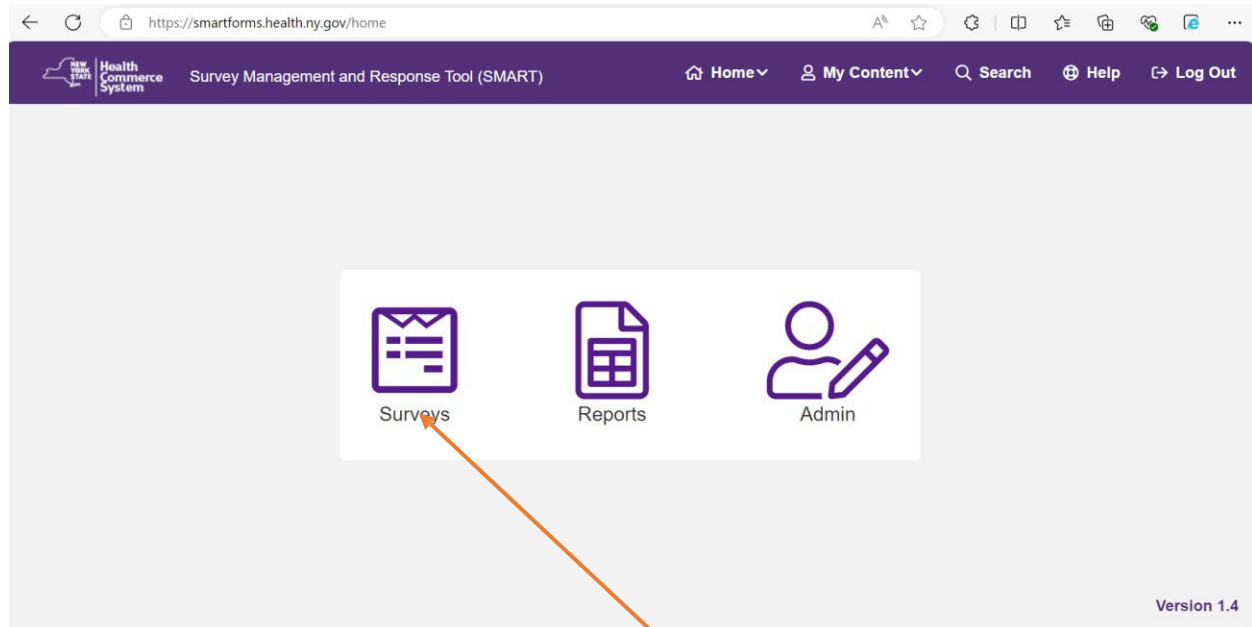
If you are the HCS Coordinator you do not have to assign yourself to any roles to take the survey.

Any other staff must be assigned the role of School Nurse or School Data Reporter to access the survey.

Accessing the School Immunization Survey

Click this link - <https://smartforms.health.ny.gov/home>

The next screen you will see looks like this:



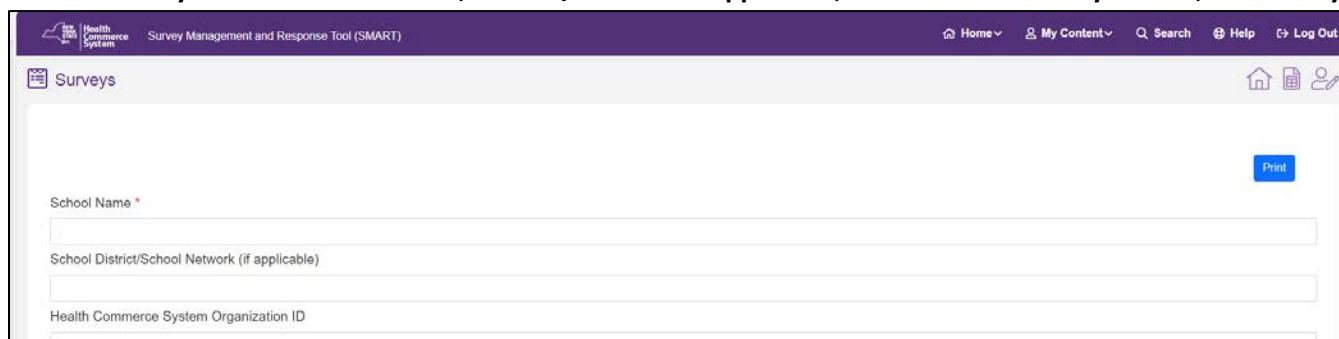
Click the first icon labeled **Surveys**

The next screen you will see will show all surveys you have access to:



Click the yellow **Open** box on the right side of the screen to open the School Immunization Survey.

Enter your School's full name, District/Network if applicable, Health Commerce System ID, and County.



Survey Management and Response Tool (SMART)

Home My Content Search Help Log Out

Surveys

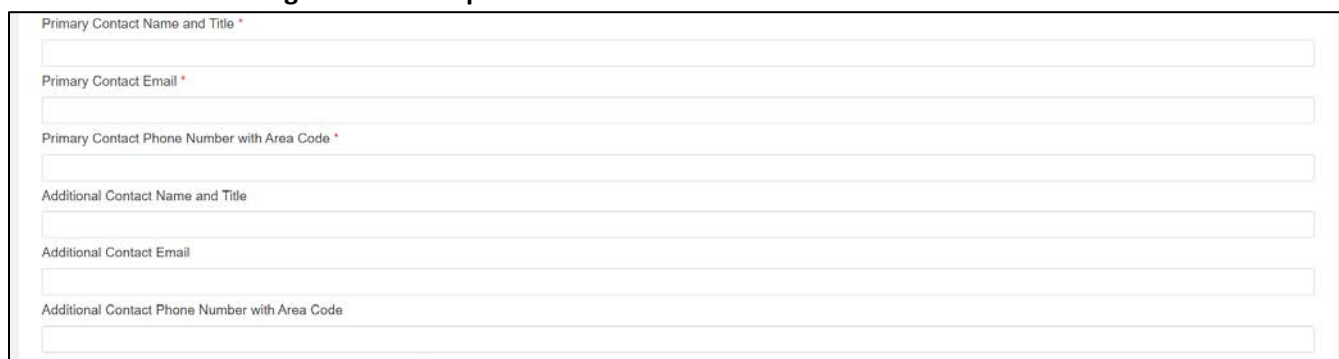
Print

School Name *

School District/School Network (if applicable)

Health Commerce System Organization ID

Enter your institution's primary contact's name, title, email address, and phone number. Additional contact information is encouraged but not required.



Primary Contact Name and Title *

Primary Contact Email *

Primary Contact Phone Number with Area Code *

Additional Contact Name and Title

Additional Contact Email

Additional Contact Phone Number with Area Code

If your school does not have a written exclusion policy, choose "No," but we recommend that you create one as soon as possible. There is no penalty for not having a written exclusion policy, but it is helpful for ensuring all students are being treated equally.



Survey Management and Response Tool (SMART)

Home

Does your school have an exclusion policy for students without vaccination records or otherwise out of compliance with Public Health Law §2164? *

☐ Yes

☐ No

If your school has an on-site pre-kindergarten or day care program that is not run by an external organization, check the Pre-Kindergarten/Day Care box. Otherwise, proceed to the Kindergarten-Grade 12 portion of the survey.

ONLY REPORT PRE-KINDERGARTEN/DAY CARE STUDENTS IF THE PRE-K/DAY CARE IS IN THE SAME BUILDING AS OTHER GRADES AND THE PROGRAM IS RUN DIRECTLY BY YOUR SCHOOL'S ADMINISTRATION

☐ Check here if your school has any Pre-Kindergarten/Day Care Students

When you check the Pre-Kindergarten/Daycare box, additional questions will appear. Be sure to enter data in both age-group tabs.

MAKE SURE TO CLICK ON BOTH AGE-GROUP TABS.

If you do not have any students in a particular age-group, enter "0" in the "Total Number of Students" field and move to the next tab.

Pre-K/Day Care Under 1 Year of Age

Pre-K/Day Care 1 Year of Age or Older

Total Number of Pre-K/Day Care Students Under 1 Year of Age *

Once you enter the number of students in an age-group, additional questions for that age-group will appear, including sections for each required vaccine series. Make sure to answer every question in these sections.

Enter zeros where needed, do not leave blanks.

Pre-K/Day Care Under 1 Year of Age

Pre-K/Day Care 1 Year of Age or Older

Total Number of Pre-K/Day Care Students Under 1 Year of Age *

10

Number of Pre-K/Day Care Students Under 1 Year of Age with Medical Exemptions *

DTaP

Number Up-to-Date with DTaP Vaccine ? *

Number with DTaP Medical Exemptions *

Polio

In the K-12 portion of the survey, make sure to enter data on every grade-level tab. If your school does not have students in all grades, enter zero in the “total number of students” field in that tab. Once you enter a numerical value of students for a particular grade, additional questions will appear.

MAKE SURE TO CLICK ON EVERY GRADE-LEVEL TAB.

If you do not have any students in a particular grade, enter "0" in the "Total Number of Students" field and move to the next tab.

DO NOT REPORT STUDENTS WHO ARE 18 OR 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

Total Number of Kindergarten Students *

Once you enter the number of students in a grade, additional questions for that age-group will appear, including sections for each required vaccine series. Make sure to answer every question in these sections. Enter zeros where needed, do not leave blanks.

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

Total Number of Sixth Grade Students *

Number of Sixth Grade Students with Medical Exemptions *

DTaP

Number Up-to-Date with DTaP Vaccine ⓘ *

Number of Students with DTaP Medical Exemptions *

Polio

Number Up-to-Date with Polio Vaccine ⓘ * Number with Polio Titer ⓘ * Number with Polio Medical Exemptions *

Error messages will appear if a value entered conflicts with another field or if you have forgotten to answer a required question. For example, the error message below appeared because the number of students with medical exemptions is higher than the total number of students in the grade. If you see an error message, check that all your numbers make sense together.

The screenshot shows a form for Grade 9. At the top, there are tabs for Kindergarten, Grade 1, Grade 2, Grade 3, Grade 4, Grade 5, Grade 6, Grade 7, Grade 8, Grade 9 (selected), Grade 10, and Grade 11. Below the tabs, the text "Grade 12" is visible. The form contains two input fields: "Total Number of Ninth Grade Students *" with the value 57, and "Number of Ninth Grade Students with Medical Exemptions *" with the value 58. A red border surrounds the second input field, and a red circle with an exclamation mark is in the bottom right corner of the field. A yellow tooltip with the text "Recheck number of students" is pointing to the 58. Below these fields, the text "DTaP" is visible.

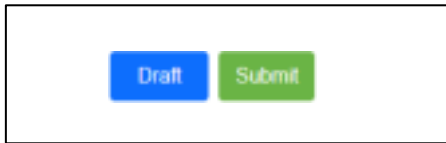
The Number of Students Completely Immunized field should be the number of students that are up-to-date with all doses and/or have demonstrated immunity to a disease (when applicable) for all required vaccines for their respective grade. This total should not include those with medical exemptions.

The screenshot shows a form for Grade 1. The text "Number of First Grade Students Completely Immunized *" is displayed above a large empty input field.

In addition to the total In Process Box for each grade, for KINDERGARTEN ONLY, there are boxes to report the In Process number for each vaccine.

The screenshot shows a form for Kindergarten. At the top, the text "DTaP" is visible. Below it, there are three input fields: "Number Up-to-Date with DTaP Vaccine ? *" (with a question mark icon), "Number with DTaP Medical Exemptions *" (with an asterisk icon), and "Number of Students in Process for DTaP". Below these fields, the text "Polio" is visible.

At the bottom of the screen, click “Submit” once completed, or “Draft” to save your progress and come back later.



You can download a PDF at any point by clicking “Print” at the top of the screen either before or after submitting.

