

HEALTH COMMERCE SYSTEM GUIDANCE TOOL

Helpful Tips to Navigate the Health Commerce System (HCS) Portal, Formerly HPN

Developed Specifically for Adult Homes, Enriched Housing, Assisted Living Programs and Residences

<https://commerce.health.state.ny.us/>

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Dear ACF/EHP/AL Provider:

Health Research, Inc, the Empire State Association of Assisted Living (ESAAL) and the New York State Association of Homes & Services for the Aging (NYAHSa) have collaborated to develop this manual to assist adult care facility/assisted living providers with the critical task of understanding, navigating and maintaining the NYS DOH mandated Health Commerce System (HCS) Portal, formerly HPN.

This guidance tool has been developed to become part of your HCS toolkit. It is intended to provide you with the background knowledge, in an understandable and easy-to-follow format, necessary to navigate the HCS.

We acknowledge and thank several government agencies whose information we included in the manual: the NYS Department of Health's Office of Emergency Preparedness, Commerce Trainers Helpdesk- Commerce Account Management; and the Health Research, Inc.

We give special thanks to ESAAL's Carla Erhartic, who took the lead in producing and distributing the manual to you. We also thank Frank Rose, RFR Consulting and representative for NYASHA, for his review and thoughtful edits.

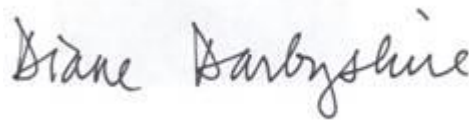
We hope you find the information useful and welcome your feedback about the guidance tool, as well as how we may further assist you. At the end of the guide we have included a survey for you to complete to tell us what HCS and/or emergency preparedness assistance we can provide you in the future. Please take a moment to complete and submit the survey. We very much appreciate your input.

As always, please feel free to reach out to ESAAL or NYASHA with any questions you may have about this guide or if you need help accessing the Health Commerce System (HCS).

Sincerely,



Lisa Newcomb
ESAAL Executive Director



Diane Darbyshire, LCSW
NYASHA Senior Policy Analyst

HCS - 101

Helpful Tips to Navigate the Health Commerce System (HCS)

The Department of Health revamped the Health Provider Network (HPN) website. It is now referred to as the Health Commerce System portal or HCS portal. The revised site was launched on June 1, 2010; replacing the HPN site.

Since that time, we have had numerous calls from providers requesting assistance in locating specific documents. In response, we have created this tool to guide you through the HCS portal and provide you actual exercises with step-by-step instructions.

Working under a grant from NYS Office of Emergency Preparedness, we have developed an “HCS-101” overview to assist you in navigating through the website, as follows:

- Basic Navigation
- Managing your content groups
- Managing your favorites
- Locating the Statistical Report and other documents
- Obtaining a user account
- Locating Commerce Communications Directory tools
- Filling Commerce Communications Directory roles

Many of the topics covered in this manual are also covered in detail through the Commerce Training Institute, a core curriculum of recurring live and self-paced training courses. All Health Commerce System users are welcome to attend CTI courses. Courses are offered and tracked through the New York State Department of Health public health learning management system. Live classes are delivered via Cisco WebEx Training Center, Personal instruction and guidance can be sought Monday through Friday from 8:00 a.m. to 5:00 p.m. by calling the commerce training staff at 518-473-1809.

Register for training at <http://www.nylearnsph.com>. Courses of interest include:

CTI-100: INTRODUCTION TO THE HEALTH COMMERCE SYSTEM PORTAL (1 HOUR)

The redesigned Health Commerce System (HCS) has been available since March 1, 2010. The HIN and HPN have been recreated as the Health Commerce System portal, or HCS. There will no longer be a separation between the HPN and HIN. This new design has been created with the help of experts in making Web sites more usable and effective and vetted by many HPN and HIN users through surveys, focus groups and usability tests conducted over the last year. The re-designed site focuses on ease-of-use and organization of information.

CTI-200 COMMUNICATIONS DIRECTORY CERTIFICATION (1.5 HOURS)

The Communications Directory Certification course provides a comprehensive review of the Health Commerce System Communications Directory, the underlying records that make up the directory, and the tools all HCS users can use to access the directory. This 1.5-hour course will begin by examining the structure of the directory and differentiating between the actual contact information records stored for each person in the directory, and the facilities and roles those records can be associated with. Once the structure of the directory has been examined, learners will review and have an opportunity to practice with the applications used to access the information stored in the directory.

CTI-210 HCS COORDINATOR TRAINING & CERTIFICATION (3 HOURS)

This self-paced learning module teaches HCS Coordinators how to complete the tasks assigned to them by simulating a year in the life of a coordinator at a long-term care facility.

Navigation Exercise Number One

Basic Navigation Tips

- Documents and web pages are organized into groups and folders in **Topics**.
- The **My Applications** panel provides links to applications you already have access to.
- The **My Favorites** panel allows you to store links directly to documents and folders on the HCS portal.

Follow the steps below as an exercise to navigate the system.

- Log in to **HCS portal**.
- At top of page, click **Topics**.
- Long Term Care** (ACF information is listed in this section) should be your default group, if it is not, use the **Select Group** drop down list to select **Long Term Care**. If **Long Term Care** is not one of your choices:
 1. Click **Edit Groups**.
 2. Click **Long Term Care** in the **Available** list at the bottom of the page.
 3. Click **Add**.
 4. Click **Update Groups**.
 5. Click **Topics** at the top of the page and resume following directions below.

Now that you have successfully added Long Term Care, you can continue with the instructions below.

- Once you choose **Long Term Care** a list of folders will appear.
- You can choose a folder of the topic you are interested in.
For this example, choose the **Disease and Conditions folder**.
- Choose the **Influenza folder**.
To view other folders and documents, click **Topics**, or use the breadcrumbs (Long Term Care > Diseases and Conditions > Influenza) to move backward through your selections.

You can change groups at any time by selecting a new group from the **Select Group** box.

Navigation Exercise Number Two

Managing your content groups

By user request, the HCS portal is organized to minimize the amount of material the user sees, to only that which is relevant to their work. This is accomplished, in part, by organizing the site content around groups and allowing users to add or remove groups as needed.

By default, you should see the **Long Term Care** group when you click **Topics**, however since default group assignments are based on where your account was created and several other factors, **Long Term Care** may not be your default group, or may not be on your list of groups at all.

Adding Long Term Care to your groups

- Log in to HCS portal.
- At top of page, click **Topics**.
- Long Term Care** (ACF information is listed in this section) should be your default group, if it is not, use the **Select Group** list to select **Long Term Care**. If **Long Term Care** is not one of your choices:
- Click **Edit Groups**.
- Click **Add Group**.
- Click **Long Term Care** in the **Available** list at the bottom of the page.
- Click **Add**.
- Click **Update Groups**.
- Click **Topics** at the top of the page to return to browsing folders and documents.

You can use this procedure to select any group you wish to add to your available groups. Please note that the HCS Portal search engine ignores your group selections and returns the closest match for your query regardless of which group assignment.

Navigation Exercise Number Three

Managing your favorites

You might have noticed that the favorites or bookmarks you have stored for the Health Commerce System do not work exactly like other favorites you might have stored for other websites. Health Commerce System business rules require that all favorites bring users to the Welcome page of the Health Commerce System so that important alert, announcement or messages will not be missed when faced with a true emergency. Understandably, this can be frustrating when you are just trying to access a document quickly.

Hint: Your browser Favorites or bookmarks will only direct you to the **Welcome page** when you are not signed into the Health Commerce System. Once you are signed in, links will take you directly to applications and documents.

Hint: If you want to access an application or document quickly, and are not yet signed into the Health Commerce System:

- Click the bookmark or link.
- Sign into the Health Commerce System.
- When you see the **Welcome Page**, click the **back button** on your browser, you should see the document or application you were looking for.

How to add a folder to My Favorites

- Log in to **HCS portal**.
- At top of page, click **Topics**.
- Long Term Care** (ACF information is listed in this section) should be your default group, if it is not, use the **Select Group** list to select **Long Term Care**. If **Long Term Care** is not one of your choices, see page 5 “Adding Long Term Care to your groups.”
- You can choose a folder of the topic you are interested in. For this example, choose the **Disease and Conditions folder**.
- Choose the **Influenza folder**.
- Notice the **breadcrumb bar**, the yellow bar that appears between the **Select Group** list and the documents & folders. This bar keeps track of what folders you have selected. The breadcrumbs are links you can use to go backward through your selections.
- Click **Add this Folder to Favorites**, located at the right-hand end of the **breadcrumb bar**.
- Click **My Favorites** in the left-side panel below the HCS logo. You will now see a folder named **Influenza**.
- Click **Organize My Favorites**, to sort your favorites in alphabetical order, or to reorganize or rename your favorites to your liking.

If you click My Favorites so that the My Favorites panel is in view before saving a new favorite, you will see the new favorite appear in your panel.

PAY ATTENTION TO YOUR FAVORITES PANEL

The Health Commerce System stores documents and web pages in a database, but because some document authors do not include good data, the name that appears in your, “*My Favorites*” panel may not be the name you expected. Check for new listings each time you create a favorite to ensure that you have a useful and meaningful favorite with the correct name. Document favorites can be re-named when saved, folders however cannot.

Click *Organize My Favorites*, and follow the instruction below if you need to rename a favorite.

How to Rename a Folder

- Log into the *HCS Portal*.
- Click *My Favorites*.
- Click *Organize My Favorites*.
- A list of favorites you have saved will appear in a new box on right.
- Click the folder you want to rename.
- A new tool bar will appear above the box, click *Rename*.
- To the right of your list will appear another box and at the top you type in the new name and then click *Rename*.
- Your new name will appear in your *My Favorites* panel.

How to Save a Document as a Favorite

- Log in to *HCS portal*.
- At top of page, click *Topics*.
- Long Term Care* (ACF information is listed in this section) should be your default group, if it is not, use the *Select Group* list to select *Long Term Care*. If *Long Term Care* is not one of your choices, see page 5 “Adding Long Term Care to your groups.”
- You can choose a folder of the topic you are interested in.
For this example, choose the *Dear Administrator Letters folder*.
- Choose the *2011 folder*.
- Choose the *ACF folder*.
- Click “*DAL Article 21-A - Annual Reporting*.”
- Click *Add to Fav.* located at the top, left side of the document.
- The bar at the top of the document will change. You can change the label or title of the favorite in the *Label box*, and click *Add to Favorite* to save the favorite. You can also specify a folder to save this favorite in from the *Create in:* list if you have created any.

If you click *My Favorites* so that the *My Favorites* panel is in view before saving a new favorite, you will see the new favorite appear in your panel.

Just as with folders, you can sort, rename, re-order, categorize, or delete favorites using the *Organize My Favorites* feature.

Navigation Exercise Number Four

Locating the Statistical Report

- Log in to *HCS portal*.
- At top of page, click *Topics*.
- Long Term Care* (ACF information is listed in this section) should be your default group, if it is not, use the *Select Group* list to select *Long Term Care*. If *Long Term Care* is not one of your choices, see page 5 “Adding Long Term Care to your groups.”
- Click *Reports*.
- Click *Home Health Care*.
- Click “*DAL HCBS 10-10 LHCSA Statistical Report Attachment*” or the “*DAL HCBS 10-11 CHHA/LTHHCP Stat Report Attachment*” as appropriate for your agency type.

By clicking the attachment you are initiating the download of a zip file containing a *Read Me* text file and two Excel sheets. Save the zip file to a location on your computer where you will be able to locate it easily. Most people save it either to My Documents or their desktop. When you click on the file name, the HCS page may appear to go blank. If this occurs then Internet Explorer will have blocked the download for security reasons. Locate the yellow information bar along the top of the Web page and click on the message. You will be prompted to download the file. Accept the download and save the file as previously indicated.

Once the file is downloaded, you can close the HCS portal and locate the zip file. Double clicking the zip file will open an unzip utility which will allow you to extract the Excel spreadsheets. There are a number of different utilities available and the interfaces are similar but not identical. To extract the files, locate the Extract button and click. The files should be extracted to the same directory that you saved the zip file to. Once the files are extracted, you can close the Unzip utility window and locate the Excel sheets.

Using Commerce Search

The Health Commerce System uses a dedicated Google search engine to make locating documents fast and easy. Search ignores your group selections and will retrieve the most relevant results from all groups.

- Log in to *HCS Portal*.
- In the *Search box* type “*2009 statistical report*.”
- Click *Search*.
- Notice that the first two results are the dear administrator letters pertaining to the reports.

Navigation Exercise Number Five

How to Obtain an HCS Account

New users must see their Health Commerce System Coordinator (HCSC) to request an account. If you do not know who your HCSC is, contact the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 (toll free). If the organization does not have an HCSC, contact the NYSDOH Adult Care Facilities program area at acinfo@health.state.ny.us to establish an HCS Director and HCSC.

The HCS Coordinator must do the following to generate an account request:

- Log on the *HCS portal*.
- Click *Coord Account Tools – HCS* on the left under *My Applications*.
- Click *Request an Account* in the blue box on the right.
- Print the desired *Security and Use Policy* under *Duties and Responsibilities* for the type of account request being generated.
- Click on the desired account request under *Request an account for...*
For step-by-step instructions, please click the type of account under *Instructions...*
- Obtain the *Information Needed for Completing the Form*, review the *Information Required before Mailing the Form*, and then click *Continue*.

For further guidance, use the Instructions link at the top of the page.

If you have account related questions, contact CAMU at 1-866-529-1890 (toll free).

Steps the prospective user must follow:

- Sign the form.
- Have the document notarized. The notary cannot be an interested party, for example, the coordinator who enters the request cannot also take the acknowledgment.
- The notary section must be complete (city, state where taken).
- Have the Coordinator sign the form.
- Keep a copy of the form. It is required for account activation.

Mail the original signed, notarized form to CAMU. The address is provided at the bottom of the form.

Allow at least seven business days from the time the completed form is received and processed by CAMU to receive the Personal Identification Number (PIN) letter and account activation instructions via U.S. Postal Service.

Requests are purged from the system if the original form is not received within 60-days. If 60-days has elapsed contact CAMU at 1-866-529-1890 for further instruction.

Navigation Exercise Number Six

Locating Commerce Communications Directory Tools

A number of applications like the Commerce Communications Directory tools are all users' tools meaning that any HCS user can access and use them. As the *My Applications* panel's main function is to provide you with direct links to the applications you have been granted access to, it was determined that, all user tools should not automatically appear in the list.

Commerce Communications Directory tools are generally found under the *HCS Applications* list. You can add frequently used Communications Directory tools to your *My Applications* Panel by clicking the green plus next to the tool on the *HCS Applications* list.

The one exception is the *Update or verify my contact information* tool found in the *My Account* section of the HCS portal. Every HCS user is required to update or verify their contact information every 90 days. When 90 days has elapsed since you last verified your information you will be presented with your contact information upon log in to the HCS portal and will be prevented from viewing any other section of the portal until you verify or update your contact information. Should your contact information change between updates, use the *Update or verify my contact information* tool under *My Account* to update your information.

For a detailed review of the Commerce Communications Directory and tools available, sign up for the *CTI-200 Communications Directory Certification* course at <http://www.nylearnsph.com>.

To Update or verify your contact information:

- Log in to *HCS portal*.
- Point to *Home* on the top menu bar.
- Click *My Account* on the submenu.
- Click *Update or verify my contact information*.
- Make the necessary adjustments.
- Click *Submit and/or Verify*.

Please note: Your business contact information is available to all other HCS users and will never be used for emergency communications. Your emergency contact information is used exclusively for emergency communications and by default is only visible to you and your coordinators. If you would prefer that only you are able to view your emergency contact information answer no to the "Do you want your coordinator to be able to update this information?" question. Answering no hides your emergency contact information from all other HCS users, while still allowing emergency communications.

Other Communications Directory tools and their uses

THE COMMUNICATIONS DIRECTORY ROLE LOOKUP TOOL

The **Role Lookup Tool** displays business contact information for individuals assigned to roles in the Communications Directory. You may search by User ID or name to find all of the roles and organizations a specific individual has been assigned to. Or you can browse by organization to see all of the individuals who have been assigned to roles within an organization. Organization type, region and county filters are provided to allow you to narrow your search. You may only view one person or organization at a time with the **Role Lookup Tool**

THE BULK MESSAGING TOOL

The **Bulk Messaging Tool** allows you to retrieve business contact information for many organizations or roles in one action. For example if you are the Emergency Response Coordinator for an Adult Care Facility and wanted to know who held the same role at the other Adult Care Facilities in your county, the **Bulk Messaging Tool** allows you to run a report showing the names, and business contact information of all other Adult Care Facility Emergency Response Coordinators.

THE COMMUNICATIONS DIRECTORY CONTACT INFORMATION SEARCH TOOL

The Communications Directory **Contact Information Search Tool** is essentially a reverse lookup utility. If you have a piece of contact information such as a telephone number, or e-mail address but cannot quite remember who it belongs to, you can use the Contact Information Search Tool to search the directory for that information. The tool will return a list of all entries containing the information you searched for. You can search by e-mail, fax number or telephone number.

Navigation Exercise Number Seven

Filling Communications Directory Roles

Only Health Commerce System Coordinators (HCSC) can edit the role assignments in the Commerce Communications Directory. If you are not an HCSC you do not need to review this exercise.

Role assignments are edited through the Coordinator's Update Tool, as a coordinator a link to this tool will automatically appear in your My Applications panel. With the Coordinator's Update Tool you can

- Assign roles to an individual.
- Assign individuals to roles.
- Update user contact information.
- Maintain the Organizational Offices.

Assigning roles to individuals

To assign roles to an individual the user must appear on your manage people list and the user's account ID must appear next to their name on the list. Do not assign roles when "No account on file" appears next to the name instead of the user ID. Instead follow the procedure for assigning individuals to roles.

- Log in to *HCS portal*.
- Click *Coordinator's Update Tool* in the *My Applications* panel along the left side of the page.
- Choose your organization, and click *Select*.
- Click *Manage People*.
- Click the name of the person you want to assign roles to. Keep in mind that only people whose account was created in the organization will appear on the list. For example if your business operates an ACF and a CHHA, user accounts that were created in the CHHA will not appear on the list for the ACF.
- Click Manage *Role Assignments*.
- Check the box to the right of each role you wish the person to hold.
- Click Revise *Role Assignments*.

Assigning individuals to a role

- Log into *HCS portal*.
- Click *Coordinator's Update Tool* in the *My Applications* panel along the left side of the page.
- Choose your organization, and click *Select*.
- Click *Manage Role Assignments*.
- Click *Modify* to the right of the role you wish to assign people to.
- Check the box next to each person you wish to assign to the role (Note: You may need to scroll down to option 3).
- Select name with valid user id
- Click *Add Role Assignment*.

If the person you want to assign to the role is not on the list, for example in a hospital-based laboratory the person will be working in the laboratory but their account was created in the hospital organization you can

use the search box to search for a person by last name and find them in the directory. If you are assigning the role to provide access to a data entry application, be sure to select only persons with user IDs. **Keep in mind that all roles in your directory must have a name listed.** It is possible that a person may be listed in more than one role. Please note, the information listed below is very important.

VERY IMPORTANT

All residences must have one staff person assigned as an HCS Coordinator. We suggest the Operator adopt a best practice and assign at least two staff people as HCS Coordinators to access and monitor the HCS. The reason is there have been cases where an assigned HCS Coordinator left employment and there was no one else in the building that could monitor the HCS account.

The NYS Department of Health will be citing residences if you don't have a staff person listed as an HCS Coordinator who regularly access and monitor the HCS Account.

Update user contact information

Every user of the HCS is required to update or verify their contact information every 90 days. However, Coordinators can review and modify contact information for people within their organizations at anytime. Keep in mind that you can only review and modify contact information under the same organization an account was created under.

- Log in to **HCS portal**.
- Click **Coordinator's Update Tool** in the **My Applications** panel along the left side of the page.
- Choose your organization, and click **Select**.
- Click **Manage People**.
- Click the name of the person you want to assign roles to. Keep in mind that only people whose account was created in the organization will appear on the list. For example if your business operates an ACF and a CHHA, user accounts that were created in the CHHA will not appear on the list for the ACF.
- You will see the user's person record. Note that every user can choose to hide their emergency contact information from you.
- Make any necessary modifications and click **Submit and/or Verify**.

Maintaining Informational Offices

In addition to roles that must be held by individuals, your facility may have several Organizational Office roles to fill as well. Keep in mind that one person could be filling all the roles, but the roles must be filled with someone's name. ***The list of Organizational Office roles is different for each organization type, however all organizations have the Emergency Office 24 by 7 Facility Contact role, so for this example we will fill that role.***

- Log in to **HCS portal**.
- Click **Coordinator's Update Tool** in the **My Applications** panel along the left side of the page.
- Choose your organization, and click **Select**.
- Click **Organizational Offices**.
- Click **Emergency Offices**.
- Click the button to the right of the **24 by 7 Facility Contact** role. If the role has never been filled the button will be labeled **Assign**, if it has been filled the button will be labeled **Modify**.
- Enter the required information. The information provided here is meant as a failsafe way to get an emergency communication through to your facility and should therefore reflect an e-mail address and telephone number that will be monitored 24 hours a day, seven days a week.
- Click **Submit**.
- Click **Back to role list**.

IMPORTANT CONTACTS:

Commerce Trainers (HCS Helpdesk)..... (518) 473-1809

Commerce Accounts Management Unit (CAMU)..... (866) 529-1890

Obtaining an HCS Account - acinfo@health.state.ny.us

Commerce Training Institute (CTI) courses<http://www.nylearnsph.com>

New York State Department of Health Office of Health Emergency Preparedness
Phone (518)-408-5163 Fax (518) 402-6228

ESAAL..... Phone (518) 371-2573 Fax (518) 371-3774
www.esaal.org

NYASHA Phone (518) 867-8383 Fax (518) 867-8384
<http://www.nyahsa.org/home/index.cfm>

OTHER IMPORTANT CONTACTS:

PLEASE USE THIS SPACE TO KEEP YOUR HCS ACCOUNT INFORMATION – THIS PAGE IS PERFORATED AND CAN BE REMOVED – ONCE FORM IS COMPLETED, FILE IN A SECURE LOCATION

Your HCS Personal Identification Number (PIN) is essential when contacting CAMU.

PIN # _____

User ID: _____

Password: _____

HCS 101 - GUIDANCE TOOL SURVEY

In an effort to provide you with useful information in the future, we invite you to complete the survey below and return to ESAAL via fax at 518-371-3774. You may also email to cerhartic@esaal.org or mail a hard copy to:

Empire State Association of Assisted Living
646 Plank Road, Suite 207
Clifton Park, NY 12065
Attention: Carla Erhartic

Name: _____ (Optional)

Facility: _____ (Optional)

Phone # _____ (Optional)

Email: _____ (Optional)

1. **Using the HCS Guidance Tool has made navigating the HCS:**

- Easier
- Somewhat easier
- Harder
- No change
- Other: _____

2. **The navigation exercises were:**

- Helpful
- Not Helpful
- Other: _____

3. **The information provided was in a format that was easy to understand:**

- Yes
- No
- Other: _____

4. **I would recommend this guidance tool to others:**

- Yes
- No
- Other: _____

5. **How could we improve upon this guidance tool?**

6. **Is there other EMERGENCY PREPAREDNESS ASSISTANCE that you would like to receive from us?**
Please list:

7. **Would you be interested in attending an educational seminar or a webinar, if it were offered?**

Yes

No

Other: _____

OTHER COMMENTS: