Instructions for Entering Data in the
Adult Care Facility (ACF) Annual Financial Reports
Using the Health Commerce System (HCS)

Please read through all of the directions once before starting the reports. Doing so will help avoid any data entry errors.

Overview:

The Adult Care Facility Annual Financial Report collects the financial data for all Adult Care Facilities. This document provides instructions for completing the Financial Reports using the Home and Community Based Care Surveillance (HCBC) system. The system is also known as the Health Electronic Response Data System (HERDS).

There are three (3) facility types:
- Private Proprietary Homes for Adults (PPHA), commonly called for profit Adult Homes;
- Not for Profit Adult Homes (NFP); and
- Enriched Housing Programs (EHP), which may be for profit or not for profit.

Please be aware of the session time limit for data entry. We recommend that you save the form periodically while entering data to avoid losing data should the system time out.

Faxed or printed copies of the financial reports will not be accepted. However, the Certification Page must be mailed to our office at the address shown below.

Steps for Data Entry:

1. Log onto the HCS website at the URL below or clicking on the following link: https://commerce.health.state.ny.us.

2. Enter User ID and Password. Click "Sign In."

3. On the HCS Home Page → click "My Applications" → click "HCBC" (if available) and then continue to Step 6. If not available, continue to step 4.

4. Locate "My Content" in the upper right side of the main menu, and click on its down arrow. Select "All Applications" from the drop-down list.

5. In the HCS Applications window, browse by "H" and scroll down to "Home and Community Based Care (HERDS)." To skip Steps 4 and 5 for future use, click on the green ⊕ (plus) sign to add to "My Applications", or only click on "Home and Community Based Care" to open without adding.

6. In the top menu of the Health Electronic Response Data System (HERDS) screen, click "Data Entry." A "Please Select Activity" box will appear. Select the applicable "2015 ACF Annual Financial Report". NOTE: Ensure that the financial report type is correct for your facility: EHP (Enriched Housing Program), PPHA (Private Proprietary Home for Adults) or NFP (Not For Profit Adult Home).

7. If you are associated with more than one facility you will have to select the proper facility name from the "Organization" drop-down box. Then the "Form" box will appear.

8. In the "Please Select Form" drop-down box, select the form to be completed.

9. Each financial reporting type has several "Forms" associated with the report. All applicable forms MUST be completed, saved and submitted. If you need a blank form to collect data, select the "Blank Form PDF" which is located in the upper right of each form.

10. Complete data entry, periodically clicking "Save All." Click "Save All" again when data entry is complete. A yellow check mark will appear next to each completed and saved entry. If a required data field is left blank, an error message will appear (and a red exclamation mark). If all data is correct, the "Form Saved" message will appear.

11. Click "Review and Submit." Check the "Data Status" column next to each field to determine status: Saved (green), Submitted (red) or Required field is blank (red exclamation mark).

12. Click the "Modify" button to return to the data entry screen. Repeat steps 10 and 11 as needed.

13. The review data step may be completed by an individual in the role of Financial Data Reporter, as specified in the Communications Directory. However, only the Financial Submitter role is able to approve the submission of the forms to the Department.

14. Click "Submit Data to DOH." All "saved" data should now state "Submitted" in red print.

15. The following confirmation message appears above the report:
    "Data have been submitted to DOH successfully."

16. A confirmation of a status change with date, time and user will appear.

Completing the process:

If you are not able to access the system, ask your HPN Coordinator to check and modify your role assignments in the Communications Directory. The Financial Data Reporter may enter data, but only the "Financial Submitter" is allowed to submit the completed forms. If you require technical assistance with HCS or HCS access, please contact Lakshmi Ravichandran at (518) 408-1624 or Lakshmi.Ravichandran@health.ny.gov. If you require assistance with the data entry forms or with submitting the data, please send a detailed email to: acfFinRpt@health.ny.gov.

The signed Certification forms must be mailed to the following address.

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