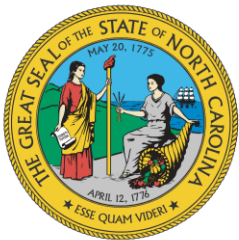


CVMS Training Session for Providers

Version 1.0

December 10, 2020



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**



REMINDER TO COMPLETE HCP ONBOARDING TEMPLATE – FOR ACCESS TO CVMS


Below are key actions you can do right now to prepare for CVMS and administering the COVID-19 vaccine.

1. **Identify internal single point of contact for your employees to send questions** or provide feedback related to the administration of COVID-19 vaccine.
2. **Identify your organization's users that need to access to CVMS and confirm that these users have a valid NCID.** Instruct users that do not have a NCID to create a NCID and provide it to you.
3. **Identify eligible employees or individuals that meet the Phase 1 criteria.**
4. **Determine process for prioritizing and scheduling employees to receive the COVID-19 vaccine.**
5. **Train your employees on the vaccine and how to handle adverse events.**
6. **If storing the vaccine, ensure proper storage and handling.**
7. **If storing the vaccine, ensure proper storage and handling.**

As part of the readiness checklist – Vaccine Coordinators – will need to complete the Health Care Provider Onboarding Template



HCP User
Onboarding Template

 NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

COVID-19 Vaccine Readiness Checklist for Phase 1 Organizations

This checklist contains recommended action items to help Phase 1 organizations ensure their readiness to administer COVID-19 vaccinations. The action items are listed in two tables: the first table are action items you can do today, and the second table are action items that you can do starting the week of December 7th when supporting information is made available. The action items in each table are listed in recommended sequence to address, and action items that are shaded blue are only applicable to Phase 1 Health Care Provider (HCP) organizations that are enrolled with the State of North Carolina to administer COVID-19 vaccines.

Please contact the COVID-19 Vaccine Management System (CVMS) Help Desk at cvms-help@dhhs.nc.gov with any questions related to this Readiness Checklist.

Action Items You Can Do Today

✓	□	□
✓	□	□
✓	□	□
□	□	□
□	□	□
□	□	□
□	□	□

✓	Action Item	Supporting Information
□	3. Identify eligible employees or individuals that meet the Phase 1 criteria.	Please see the Appendix of this document for the North Carolina Phase 1 Prioritization / Eligibility Matrix. Please use the State-provided Employee Bulk Upload Template to begin to document Phase 1 eligible employees / individuals. See below for definitions of Risk column and Type column in the Employee Bulk Upload Template. FIELD DEFINITIONS FOR EMPLOYEE BULK UPLOAD TEMPLATE <ul style="list-style-type: none">• RISK (column D): Should be noted as "High" if the employee is responsible for caring/cleaning in areas with COVID-19 patients, performing tasks with high risks of aerosolization (Intubation, Bronchoscopy, Suctioning, Invasive Dental Procedures, Invasive Specimen Collection, CPB), responsible for handling decedents with COVID-19, or planning to administer the COVID Vaccine.• TYPE (column E): Select Employee if person is working for the organization and select Individual if the person is a resident of the organization (e.g., residents of a nursing home).
□	4. Determine process for prioritizing and scheduling employees to receive the COVID-19 vaccine (two doses) and logistics on where employees will need to go to receive the COVID-19 vaccine.	The Pfizer and Moderna COVID-19 vaccines require two doses. The minimum number of days between the first and second dose is expected to be 21 calendar days for the Pfizer vaccine and 28 calendar days for the Moderna vaccine.
□	5. Consider developing internal FAQs for your organization to help employees understand the COVID-19 vaccination process.	This document could include details on the specific process for employees to schedule and receive the COVID-19 vaccine, timing on when the COVID-19 vaccine is expected to be received, where to go to learn more about the COVID-19 vaccines, and your organization's policy or expectations on employees getting the COVID-19 vaccine.
□	6. HCPs Only: Train your designated vaccine administrators on how to report an adverse event in VAERS following a COVID-19 vaccine administration.	Per the CDC COVID-19 Vaccination Program Provider Agreement, COVID-19 vaccination providers are required to report adverse events following COVID-19 vaccination and should report clinically important adverse events even if they are not sure if the vaccination caused the event. https://www.cdc.gov/vaccinesafety/ensuringsafety/monitoring/vaers/index.html

The HCP User Onboarding Template

Name of Person Preparing List:		Email Address:	
Title:		Phone Number:	
Location Name:			Location Phone Number:
Location Street Address:			Location City:
Location State:		Location Zip code:	

For the **Person completing the file:**

- Full Name, Email Address, Phone Number, Title

For the **Location:**

- Location Name, Street Address, City, State, Zip code

For **Users Requesting Access:**

- First Name, Last Name, Email address, NCID, Project

On the tab "User List for CVMS Access" Complete the following

For the **Person** completing the file:

- Full Name, Email Address, Phone Number, Title

For the **Location**:

- Location Name, Street Address, City, State, Zip code, Phone Number

For Users Requesting Access:

- First Name, Last Name, Email address, NCID, Profile

[illegible]

Once you have completed this file per your organization's needs – please send to (for provisioning into CVMS)

COVIDHelp@dhhs.nc.gov



Today's expectations



Participate in click-through demonstrations of all key transactions in the CVMS Provider Portal



Ask questions anything you have heard/learned so far about CVMS including when you have access, how to get help, etc.



Learn more about the Help Desk, Training Resources, Communications, and additional channels for support.

Agenda

Welcome and What to Expect Today

CVMS Overview

CMVS Provider Portal Profiles

A Day in the Life of a Healthcare Location Manager...

1. Receiving and Processing Vaccine Inventory
2. Tracking Vaccine Returns, Wastage, and Transfers
3. Managing Employee Bulk Upload Process

A Day in the Life of a Healthcare Provider...

1. Checking In and Verifying Recipient Eligibility for the Vaccine
2. Documenting Vaccine Administration
3. Exploring List Views on Recipients

What to Expect Next

How to Participate Today

- Session is being recorded
- Mute your line unless you are addressing the group
- Interactive session
- Utilize Chat box to ask questions – we will address during our question breaks!
- We will pause for questions at the conclusion of each demonstration



CVMS Overview

 5 min

What is CVMS?



What is CVMS?

The COVID-19 Vaccine Management System (CVMS) is a secure, cloud-based **vaccine management solution for COVID-19 that enables vaccine management and data sharing across providers, hospitals, agencies, and local, state, and federal governments on one common platform.**

When the CVMS MVP is launched on 12/10, providers will be able to:

- **Enroll in the COVID-19 Vaccine Program and upload employees so they can register for COVID-19 vaccination**
- **Manage COVID-19 vaccine inventory**
- **Track COVID-19 vaccine administration**

In future CVMS releases, providers will also be able to schedule clinics.



Who will use CVMS?

1. NC State officials **will enroll providers and verify provider eligibility** along with verifying site readiness.
2. **Providers will verify recipient eligibility, log dosage administration, and track frequency** and timing of additional dosages.
3. **Recipients** will also have a portal where they can do things like complete their health questionnaire and view their proof of vaccine.
4. And lastly, some *non healthcare* employers will also have a portal that they will use for uploading for high-risk employees on their staff who will need get vaccinated.

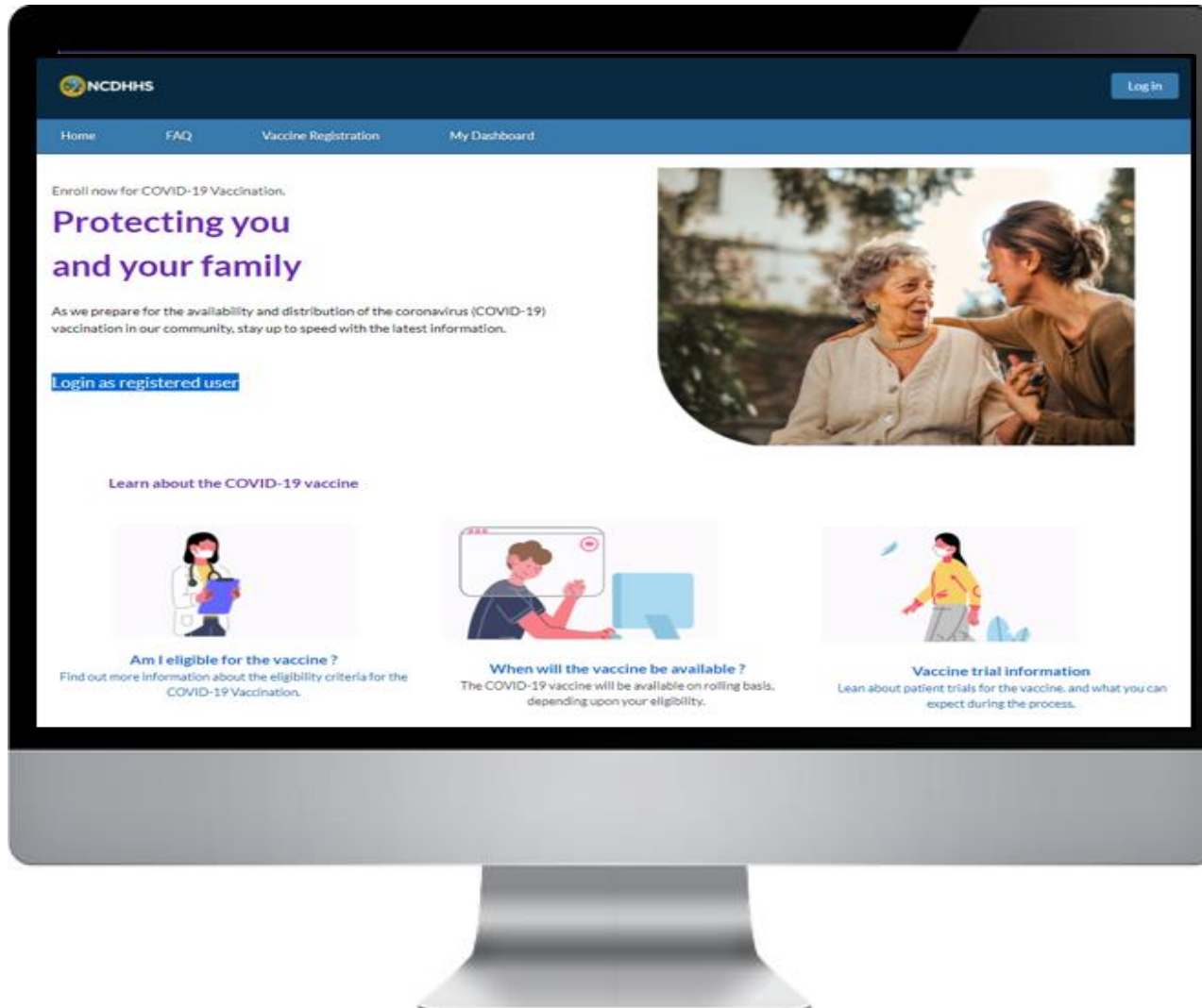


Why CVMS?

CVMS provides a flexible approach for managing, delivering, and administering vaccine programs.

It consolidates multiple legacy, siloed systems into an integrated platform with configurable modules. **This will allow for quicker updates to the system in order to meet business needs.** In addition, **built-in automation features means less time on routine tasks** and more time on high-value activities.

A Little Bit More About the Recipient Portal before we dive into Providers!



Recipients will have their own CVMS Portal where they will be able to...

- Complete Consent form and Health Questionnaire
- View Vaccine Eligibility status
- Receive Notification of Second Dose Appointment
- Obtain Proof of Vaccination



CVMS Provider Portal Profiles

 5 min

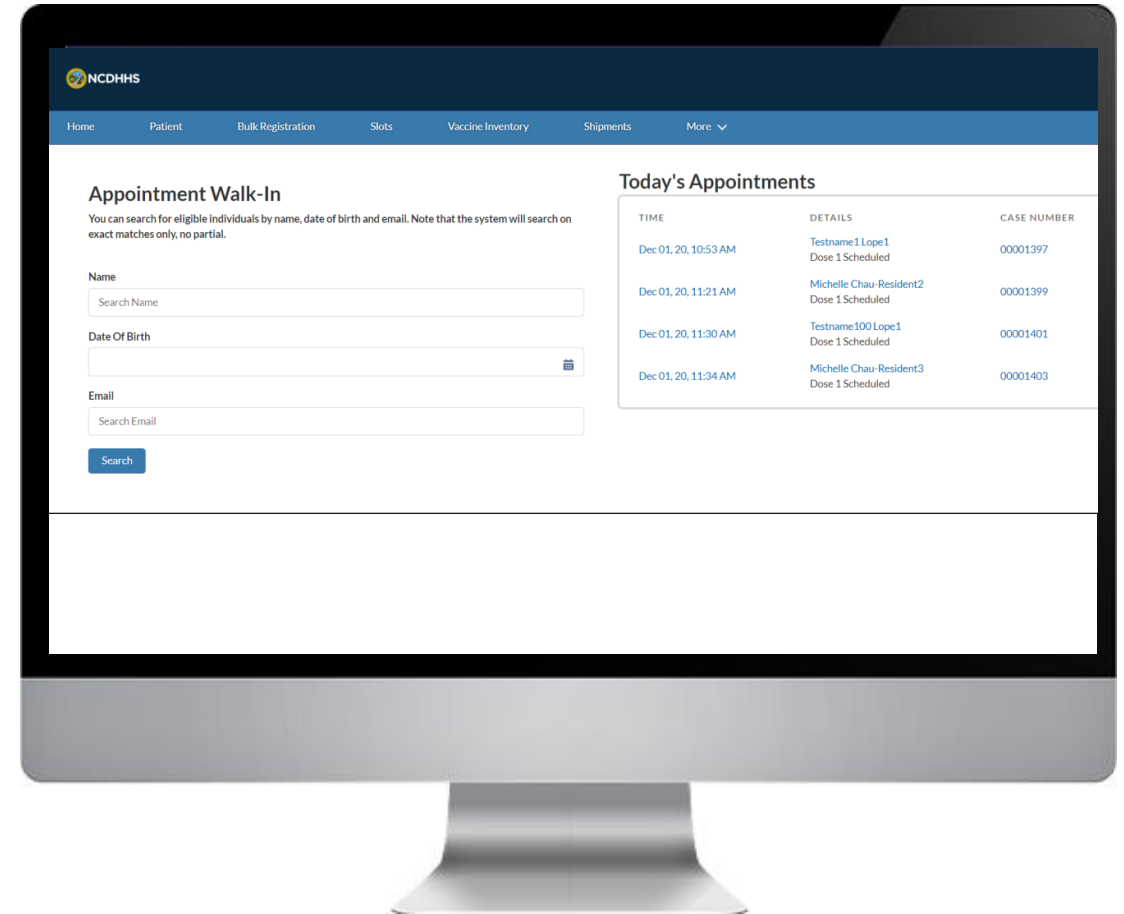
User Profiles on the CVMS Provider Portal

Healthcare Location Manager

- View, Receive and Add Inventory
- View Order and Shipment details
- View and Update Vaccine Inventory Reduction
- Manage Location Information

Healthcare Provider

- Check-In Recipient
- Verify Recipient's Identify
- Verify Eligibility
- Log Vaccine Administration

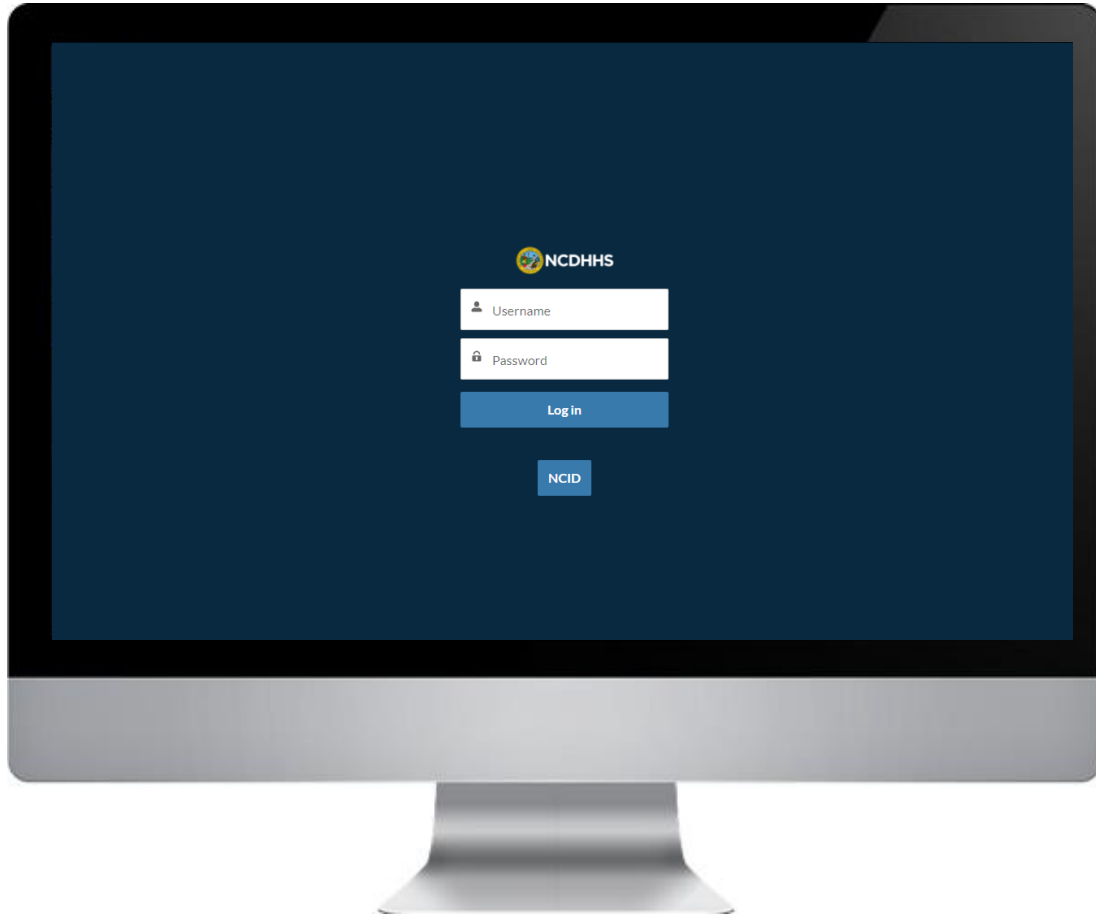




Getting Logged In!

 10 min

Logging In Overview!



In this module, we will review:

1. How to Log In to the CVMS Provider Portal using your NCID and NCID Password
2. The Two Different Views of the CVMS Provider Portal Navigation Bar

It is important to note that you will need to use the latest version of Chrome, Firefox, or Safari as your Internet Browser.

How to Obtain your NCID

If you do not have a Business NCID, go to <https://NCID.NC.GOV> to start the process!





What is NCID? NCID is a web-based application that provides a secure environment for state agency, local government, business, and individual users to log in and gain access to the state's applications.

Step 1 of 3: Log In to the CVMS Provider Portal

1. On the CVMS Provider Portal landing page click **NCID**
2. The NCID credentials page appears



 Username

 Password

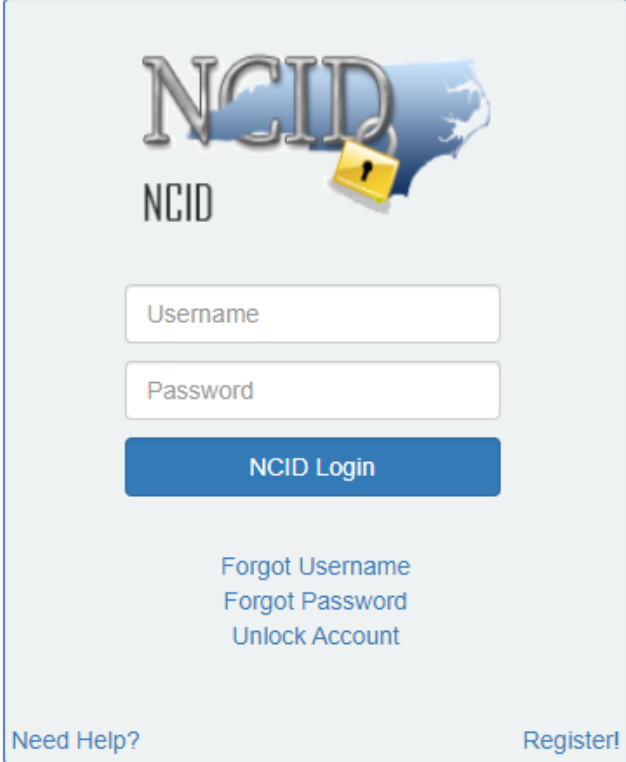
Log in

NCID

Step 2 of 3: Enter your NCID and NCID Password

1. Enter your **NCID** and **NCID PASSWORD**
2. Click **NCID LOGIN**
3. You are logged in to the CVMS Provider Portal

NCID Tips



The login form features the NCID logo at the top, which includes the text 'NCID' and a graphic of a blue map of North Carolina with a yellow padlock. Below the logo are two input fields: 'Username' and 'Password'. A blue button labeled 'NCID Login' is positioned below the password field. Underneath the button are three links: 'Forgot Username', 'Forgot Password', and 'Unlock Account'. At the bottom left of the form is a link 'Need Help?' and at the bottom right is a link 'Register!'.

NCID

Username

Password

NCID Login

[Forgot Username](#)

[Forgot Password](#)

[Unlock Account](#)

[Need Help?](#)

[Register!](#)

[Privacy and Other Policies](#)

[Contact Us](#)



WARNING: This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action.



NCC742

Step 3 of 3: View of the CVMS Provider Portal Home Page

The Home Page has **TABS** at the top of the page:

1. As a Healthcare Location Manager, you will see Home, Recipient, Bulk Registration, Vaccine Inventory, Shipments, and Help & Information tabs.
2. As a Healthcare Provider (Front Desk, Clinician), you will see Home, Recipient, and Help & Information tabs.

On the Home Page itself, you will see on the left side of the page the **APPOINTMENT WALK-IN** feature, and on the right-side the **TODAY'S APPOINTMENTS** feature.

Healthcare Location Manager Profile Top Navigation Bar



Healthcare Provider Profile Top Navigation Bar

A screenshot of the top navigation bar and main content area for the Healthcare Provider profile. The navigation bar is identical to the one above. The main content area has a white background. On the left, there is a section titled "Appointment Walk-In" with a search form containing fields for Name, Date Of Birth, and Email, and a Search button. On the right, there is a section titled "Today's Appointments" with a table showing appointment details.

TIME	DETAILS	CASE NUMBER
Dec 07, 20, 01:36 PM	Chad Armstrong Dose 2 Scheduled	00001602



In this module, we reviewed:

- 1. How to Log In using your NCID and NCID Password**
- 2. The Two Different Views of the Provider Portal Navigation Bar**

Do you have any questions?



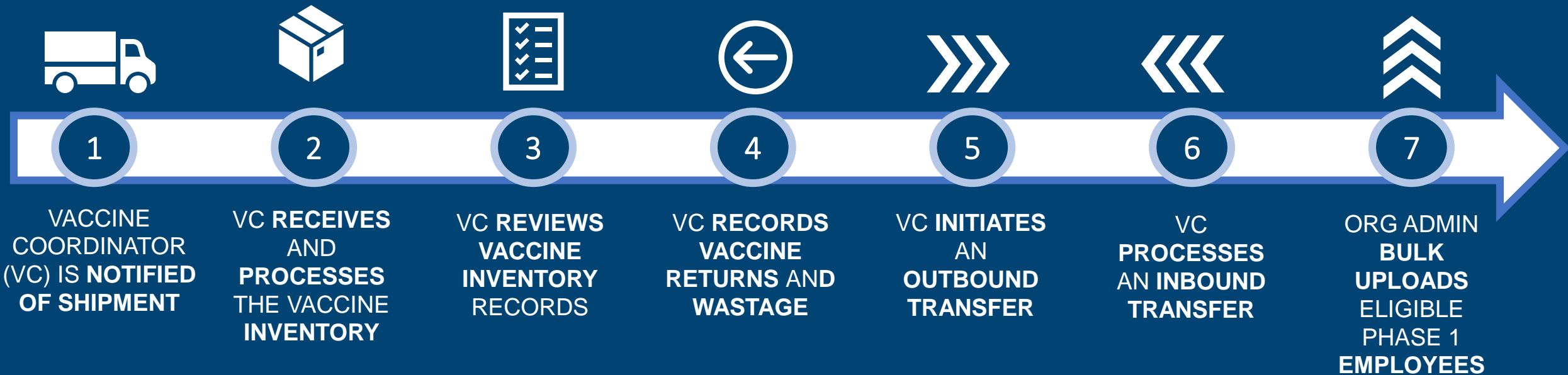
A Day in the Life of a Healthcare Location Manager



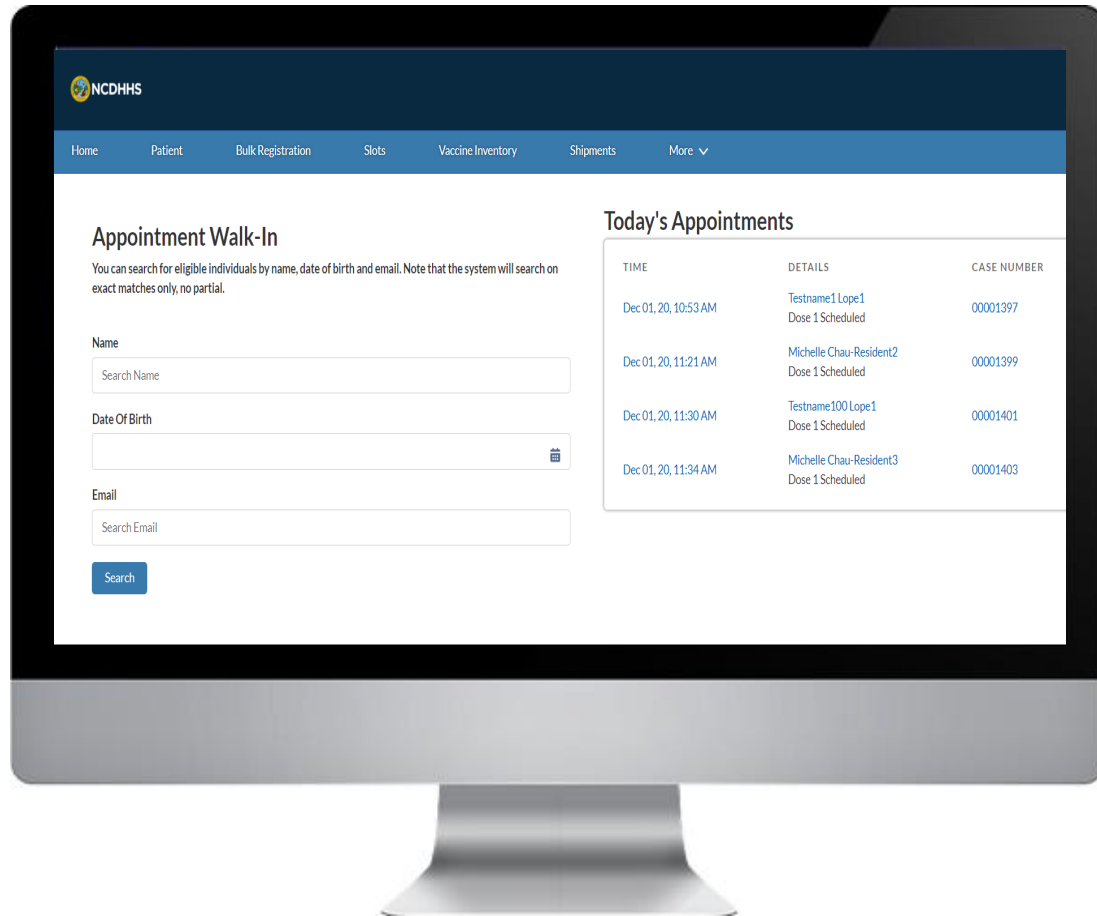
25 min

A Day in the Life of a Healthcare Location Manager ...

In this module, we'll walk through various activities from the perspective of a Vaccine Coordinator and an Organization Administrator.



Receiving, Processing, and Reviewing Vaccine Inventory Overview



In this module, we will review:

1. Viewing Upcoming Vaccine Shipments
2. Processing Vaccine Shipments
3. Viewing All Vaccine Inventory Records
4. Recording Vaccine Wastage & Returns
5. Initiating Outbound Vaccine Transfers
6. Processing Inbound Vaccine Transfers
7. Where to find the Employee Bulk Upload template
8. Completing the Employee Bulk Upload Template
9. Upload the Employee Bulk Upload file
10. Managing Failed Employee Bulk Uploads
11. Viewing Successfully Loaded Employees

Vaccine Inventory and Employee Bulk Upload Key Terms

Vaccine Wastage

You will record all cases of Vaccine Wastage in the CVMS Provider Portal. **Reasons for vaccine wastage include broken vials/syringes, vaccine drawn into syringe but not administered, lost or unaccounted for vaccine, non-vaccine product** (e.g., IG, HBIGH, Dil), Open vial but all doses not administered.

Vaccine Returns

In the CVMS Provider Portal, you will record all cases of Vaccine Returns to Manufacturer. **Reasons for return to manufacturer include improper refrigerator temperatures, expired vaccines, power outage, improper storage conditions, spoilage in transit, mechanical failures, recall, spoiled** (other).

Employer

Hospital, medical facility, retail pharmacy that will be administering the vaccine to recipients, nursing home, etc..

Risk

During the Employee Bulk Upload Process, the Risk Value for every employee or individual must be entered in the Employee Bulk Upload Template. Risk values include: HIGH or LOW. Indicate HIGH if the employee is responsible for caring / cleaning in areas with COVID-19 patients, performing tasks with high risks of aerosolization (Intubation, Bronchoscopy, Suctioning, Invasive Dental Procedures, Invasive Specimen Collection, CPR), responsible for handling Decedents with COVID-19, or planning to administer the COVID-19 Vaccine.

Type

During the Employee Bulk Upload Process, the Type Value for every employee or individual must be entered in the Employee Bulk Upload Template. Risk values include: EMPLOYEE or INDIVIDUAL. Indicate EMPLOYEE for people who are working for the employer. Indicate INDIVIDUAL for people who are residents of the employer (e.g., residents of a nursing home, prison, or other long term care facility).

Vaccine Shipment Email Notification

Primary Vaccine Coordinators will be notified via **EMAIL** if a **VACCINE SHIPMENT** has been processed for location(s) they support. You can expect the email to come from the **CVMS Support Team**.

You will receive an email notification for each shipment **BY VACCINE TYPE**. Details in the email will include:

- Provider PIN
- Location Name
- Date Shipped
- Quantity Shipped
- Manufacturer
- VTrckS Order Number
- Shipment Tracking Number
- Carrier

Hello TestXYZ HealthcareManagerOne,

Please see below for details of a COVID-19 vaccine shipment that is on its way to your location.

Quantity Shipped: 75

Date Shipped: 20201206

Manufacturer: TestManf1

NDC: 11111-111-11

ExIS Order ID: 500002

ExIS Order Line Number: 1

Lot Number: U682A02

Shipment Tracking Number: 30002

Carrier: FDX1

If you have any questions, please email COVIDhelp@dhhs.nc.gov.

Thank you, Vaccine Management Support Team



NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES


Information Required for the Transfer Request Form

You will need the following details to complete a **COVID-19 Vaccine Transfer Request Form**, which requires pre-approval from the NC DHHS Immunization Branch.

Location of Form: <https://immunize.nc.gov/>

Sending Provider should email completed form to CVMS-help@dhhs.nc.gov

NC DHHS Immunization Branch team will review submitted transfer requests. If the **TRANSFER REQUEST IS APPROVED**, the state will notify the Sending Provider and Receiving Provider and input the transfer in CVMS. The Sending Provider's **INVENTORY WILL AUTOMATICALLY** be adjusted by the amount transferred.



COVID-19 Vaccine Transfer Request Form

Instructions: To request a transfer of COVID-19 vaccine inventory from one location to another location, the Sending Provider shall complete and email this COVID-19 Vaccine Transfer Request Form to CVMS-help@dhhs.nc.gov. Transfers requests for COVID-19 vaccines require NC DHHS Immunization Branch approval to ensure proper storage capabilities and tracking of COVID-19 vaccine inventory movements. Please call 1-877-873-6247 if you have any questions.

Date of Transfer Request:		Name of Person Completing Form:	
Reason For Transfer Request:			

Sending Provider Information

CVMS Location Name:			
Street Address:		City:	
Phone Number:		Zip:	
Email Address:		Pin #:	
<small>(for Immunization Branch Use Only)</small>			

Receiving Provider Information

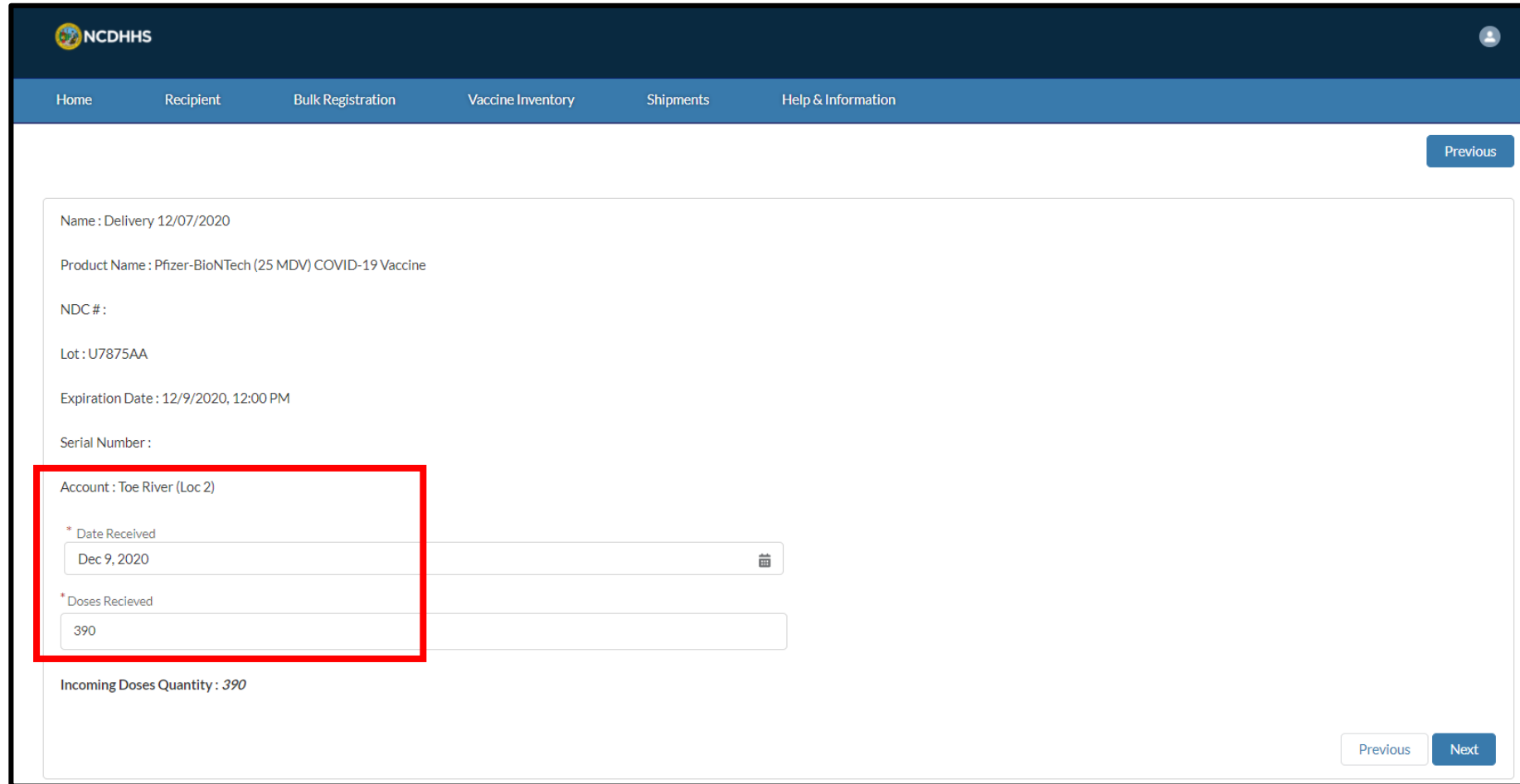
CVMS Location Name:			
Street Address:		City:	
Phone Number:		Zip:	
Email Address:		Pin #:	
<small>(for Immunization Branch Use Only)</small>			

COVID-19 Vaccine(s) Being Transferred			
Manufacturer Name	Manufacturer Lot #	Expiration Date / Beyond Use Date	# of Doses Transferred

Add the Inbound Transfer to Your Inventory

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** records that are incoming transfers to your location. These records were created by the Immunization Branch Team. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

1. Select the correct **VACCINE INVENTORY** record
2. Enter the **DATE RECEIVED**
3. Enter the **DOSES RECEIVED**
4. Click **NEXT**



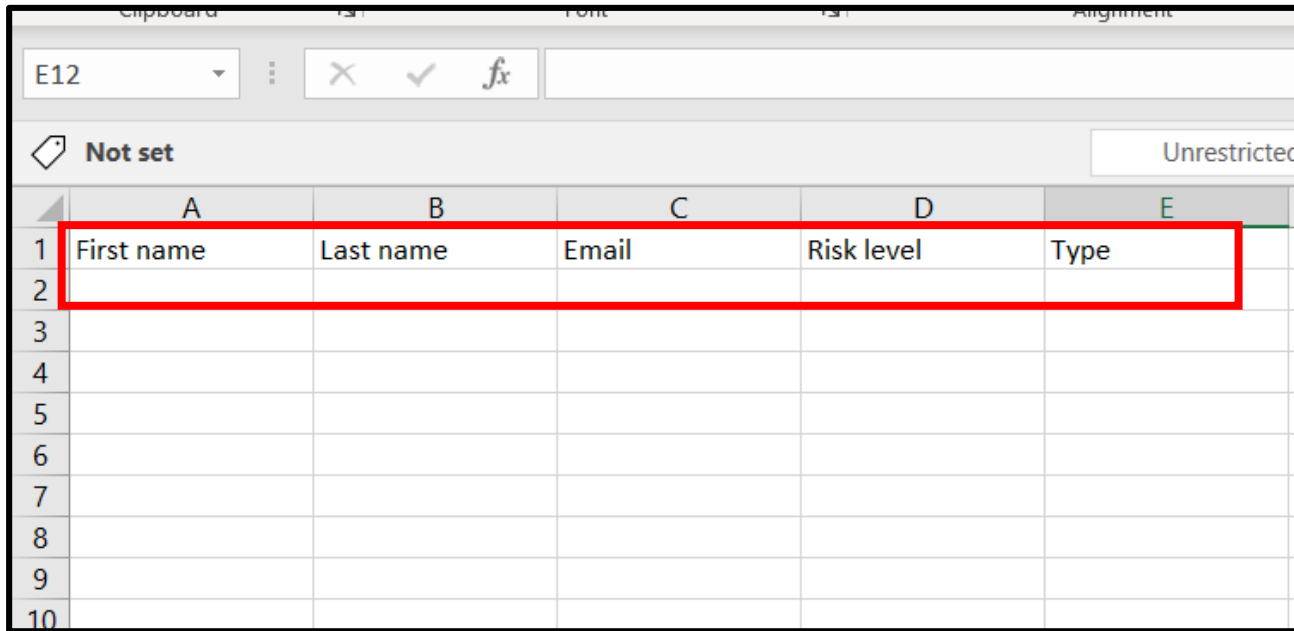
The screenshot displays the NCDHHS Vaccine Inventory system interface. The top navigation bar includes links for Home, Recipient, Bulk Registration, Vaccine Inventory, Shipments, and Help & Information. The main content area shows a record for a vaccine delivery. The record details are as follows:

- Name: Delivery 12/07/2020
- Product Name: Pfizer-BioNTech (25 MDV) COVID-19 Vaccine
- NDC #:
- Lot: U7875AA
- Expiration Date: 12/9/2020, 12:00 PM
- Serial Number:
- Account: Toe River (Loc 2)
- * Date Received: Dec 9, 2020
- * Doses Received: 390
- Incoming Doses Quantity: 390

A red box highlights the 'Date Received' and 'Doses Received' fields, indicating the steps to be followed. The 'Previous' and 'Next' buttons are visible at the bottom right of the form.

Add Employee Data to the Employee Bulk Upload Template

To begin the Employee Bulk Registration process, you will need to collect information on your Phase 1 eligible employees / individuals. The information collected must be **VALID**, as it will be **CONSIDERED LEGAL MEDICAL INFORMATION**. Ensure that legal names and real email addresses are captured.



	A	B	C	D	E
1	First name	Last name	Email	Risk level	Type
2					
3					
4					
5					
6					
7					
8					
9					
10					

NOTE: You will only be able to load 100 employee records at a time. We will review instructions on how to receive support if you need to upload more than 100 employees.

1. Confirm you have the [**EMPLOYEE BULK UPLOAD TEMPLATE**](#)
2. Enter the following information in the template:
 - Employee First Name
 - Employee Last Name
 - Employee Email Address
 - Risk
 - Type
3. For the **RISK FIELD**, you will enter either:
 - High
 - Low
4. For the **TYPE FIELD**, you will enter either:
 - Employee
 - Individual

How to Determine the Risk Value of an Employee

The following questions can help you evaluate the **RISK LEVEL** for each of your employees.

1. Are they responsible for caring / cleaning in areas with COVID-19 patients?
2. Are they responsible for performing tasks with high risks of aerosolization (e.g., intubation, bronchoscopy, suctioning, invasive dental procedures, invasive specimen collection, CPR)?
3. Are they responsible for handling decedents with COVID-19?
4. Are they planning to administer the COVID-19 vaccine?

Not set					
	A	B	C	D	E
1	First name	Last name	Email	Risk level	Type
2	Azalea	Johnson	azaleatest@mailinator.com	High	Employee
3	Omri	Noel	omrinoel@mailinator.com	High	Employee
4	Quaint	Jitsu	quaintmma@mailinator.com	High	Employee
5	John	Neil	johnneil@mailinator.com	High	Employee
6	Liz	Doc	liz@mailinator.com	High	Employee
7	Josh	Hatch	joshhastch@mailinator.com	High	Employee
8	Matthew	Troche	matttroche@mailinator.com	High	Employee
9					
10					

*If you answered **YES** to any of the questions above, the **RISK** value should be entered as **HIGH**.*

How to Determine the Type Value of an Employee

How to validate the TYPE VALUE of an Employee:

1. Understand if the person you are uploading is *either* an Employee – *or* – an Individual.
2. **MARK** the person as **EMPLOYEE** if they are currently **EMPLOYED** by you.
3. **MARK** the person as **INDIVIDUAL** If they are currently **RESIDING** in **YOUR ESTABLISHMENT**

* In most scenarios, you will likely select **EMPLOYEE**.

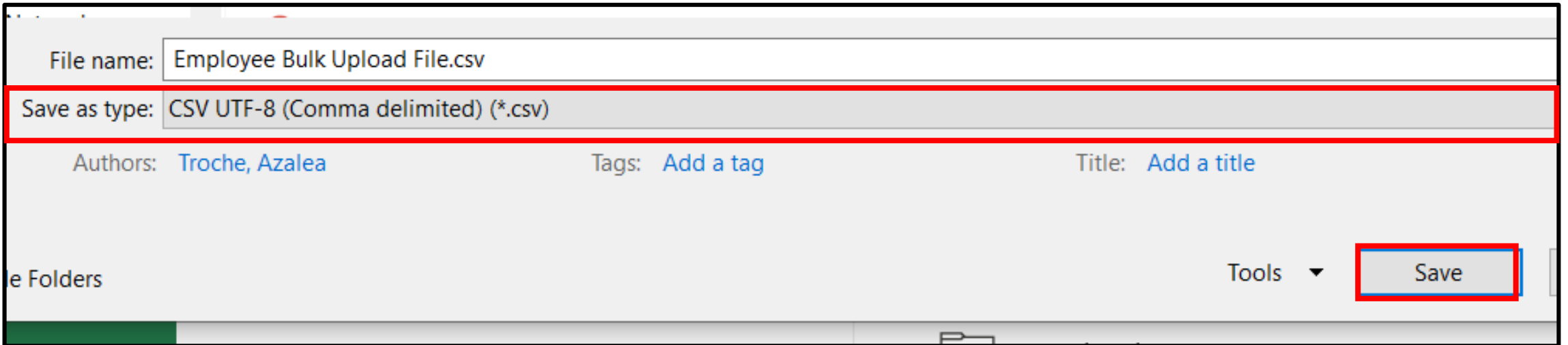
Not set					
	A	B	C	D	F
1	First name	Last name	Email	Risk level	Type
2	Azalea	Johnson	azaleatest@mailinator.com	High	Employee
3	Omri	Noel	omrinoel@mailinator.com	High	Employee
4	Quaint	Jitsu	quaintmma@mailinator.com	High	Employee
5	John	Neil	johnneil@mailinator.com	High	Employee
6	Liz	Doc	liz@mailinator.com	High	Employee
7	Josh	Hatch	joshhastch@mailinator.com	High	Employee
8	Matthew	Troche	matttroche@mailinator.com	High	Employee
9					
10					

Verify & Save Employee Data to Upload File

You are now ready to **REVIEW ALL REQUIRED EMPLOYEE DATA** that you have entered and **SAVE THE FILE AS A .CSV FILE**.

How do I save a excel sheet as a .csv file?

1. Click the **FILE** button
2. Click **SAVE AS**
3. **ENTER A FILE NAME** (no file name requirements)
4. For file type, select **CSV (comma-delimited) (*.csv)**
5. Click **SAVE**



File name: Employee Bulk Upload File.csv

Save as type: CSV UTF-8 (Comma delimited) (*.csv)

Authors: Troche, Azalea Tags: Add a tag Title: Add a title

Save

Uploading Employee Bulk Upload Files with More than 100 Rows

Remember, the Employee Bulk Upload Process can only upload files with a **MAXIMUM OF 100 EMPLOYEE RECORDS**.

If you need to **UPLOAD** a file with **MORE THAN 100 RECORDS**, please **SEND YOUR .CSV FILE TO COVIDHELP@DHHS.NC.GOV**. You will be assisted in this process.

Before you send your file, confirm the following:

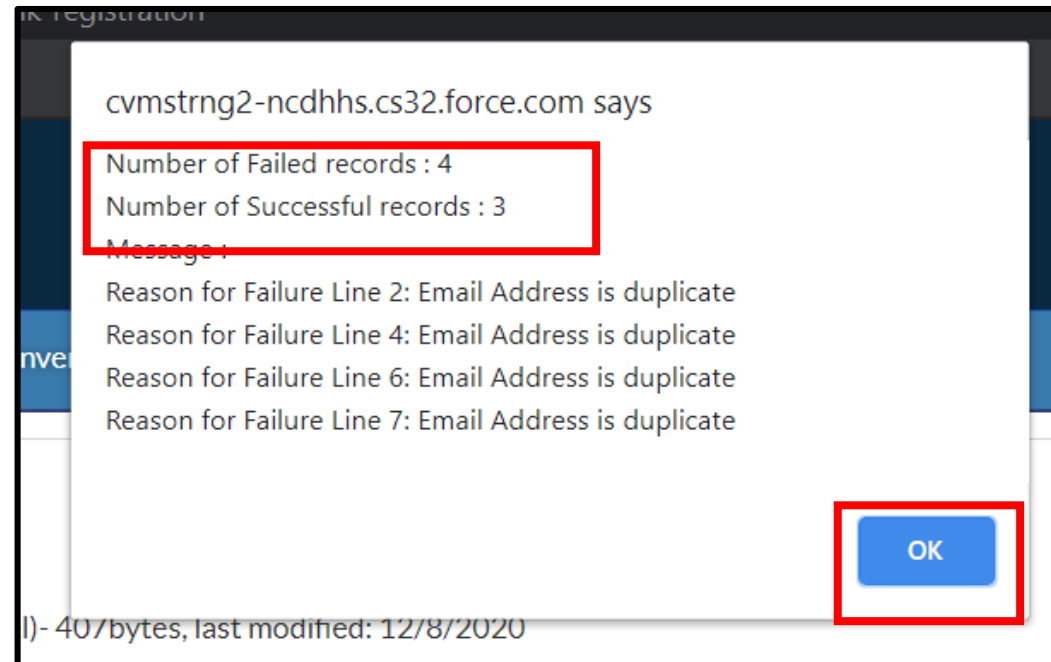
1. The file uses the correct template
2. All employee records are complete and accurate
3. The file is saved as a .CSV file

Review Successful and Failed Records Alert Message

Once the upload is complete, you will receive an **ALERT MESSAGE**. The message will state the number of **SUCCESSFUL** employee/recipient uploads and number of **FAILED** employee/recipient uploads.

Once you click **OK**, the successful uploads will **RECEIVE AN AUTOMATIC EMAIL NOTIFICATION** allowing them to **REGISTER** to the **CVMS RECIPIENT PORTAL**.

You will also receive an **AUTOMATIC EMAIL** with the **FAILED LOADS** and the **REASON FOR FAILURE**. You will receive an extract of records that need correction. No email will be sent to failed records.



Receive Email with any Upload File Errors

If any employee records included in your upload fail, you will **AUTOMATICALLY RECEIVE AN EMAIL** from CVMS after clicking **OK** on the **ALERT MESSAGE**.

The attachment included in the email will **CONTAIN THE FAILED RECORDS** in the same employee bulk upload format. It will also include an additional column with the **REASON FOR FAILURE**.

1. **OPEN THE EMAIL**
2. The email subject line should read: **BULK UPLOAD FAILURE RECORDS**
3. **OPEN THE EXCEL** attachment in the email

Not set							Unrestricted	Confidential	Highly Confidential
	A	B	C	D	E	F	G		
1	FirstName	LastName	PersonEmail	Risk Level	Type	Error			
2		TestLoadE2ERecip2	Nicholas.NoEmail@company.email2.com	High	Employee	Line 2: First Name is blank			
3	Nicholas		Nicholas.NoEmail@company.email3.com	High	Employee	Line 3: Last Name is blank			
4	Nicholas	TestLoadE2ERecip4		High	Employee	Line 4: Email Address is blank			
5	Nicholas	TestLoadE2ERecip5	bademail	High	Employee	Line 5: Email Address is invalid			
6	Nicholas	TestLoadE2ERecip6	Nicholas.NoEmail@company.email6.com		Employee	Line 6: Risk Level is invalid			
7	Nicholas	TestLoadE2ERecip7	Nicholas.NoEmail@company.email7.com	High		Line 7: Individual Type is invalid			
8	Nicholas	TestLoadE2ERecip8	Nicholas.NoEmail@company.email8.com	Middle	Employee	Line 8: Risk Level is invalid			
9	Nicholas	TestLoadE2ERecip9	Nicholas.NoEmail@company.email9.com	High	Someone	Line 9: Individual Type is invalid			
10									
11									
12									

Potential Reasons for Failure

There are a few reasons why an employee record may fail – from blank fields to invalid data formats.

Potential Error Messages	Meaning	How to Fix
EMAIL IS NOT UNIQUE	The entered email for this record was already found in CVMS	<ol style="list-style-type: none">1. Search in CVMS for the listed email to see if employee is already uploaded2. If employee is already in CVMS, you can delete this record from your file3. If employee still needs to be uploaded, see if employee has an alternative email that can be entered
FIRST & LAST NAME CANNOT BE EMPTY	A first and / or last name was not entered for this record, which is required	<ol style="list-style-type: none">1. Fill in missing first and / or last name
EMAIL CANNOT BE BLANK	An email value was not entered, which is required	<ol style="list-style-type: none">1. Enter email address for employee
INVALID EMAIL ADDRESS	An invalid email address was submitted	<ol style="list-style-type: none">1. Enter email address for employee



In this module, we reviewed:

- 1. Viewing Upcoming Vaccine Shipments**
- 2. Processing Vaccine Shipments**
- 3. Viewing All Vaccine Inventory Records**
- 4. Recording Vaccine Wastage & Returns**
- 5. Initiating Outbound Vaccine Transfers**
- 6. Processing Inbound Vaccine Transfers**
- 7. Where to find the Employee Bulk Upload template**
- 8. Completing the Employee Bulk Upload Template**
- 9. Upload the Employee Bulk Upload file**
- 10. Managing Failed Employee Bulk Uploads**
- 11. Viewing Successfully Loaded Employee**

Do you have any questions?



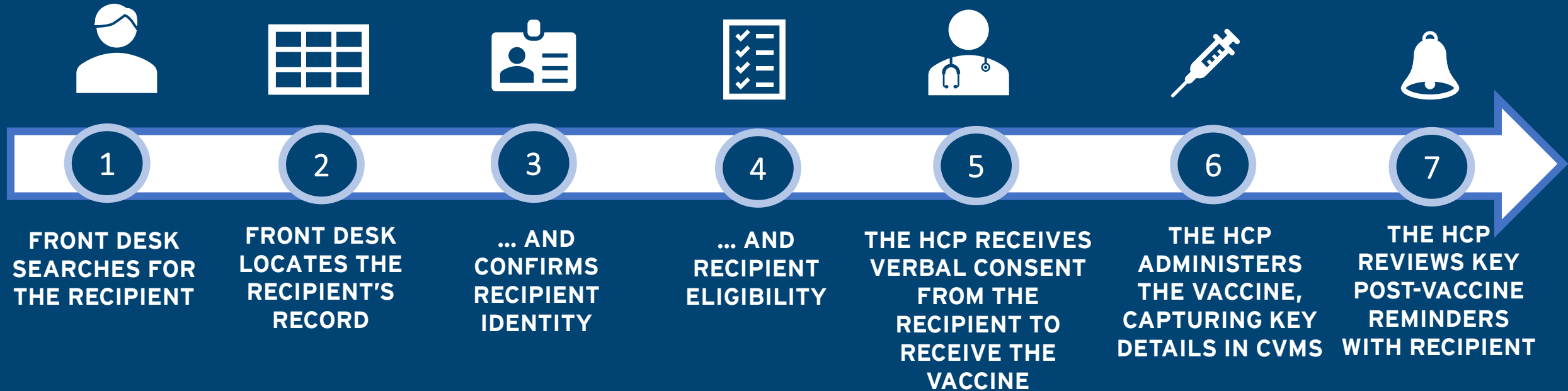
A Day in the Life of an Healthcare Provider



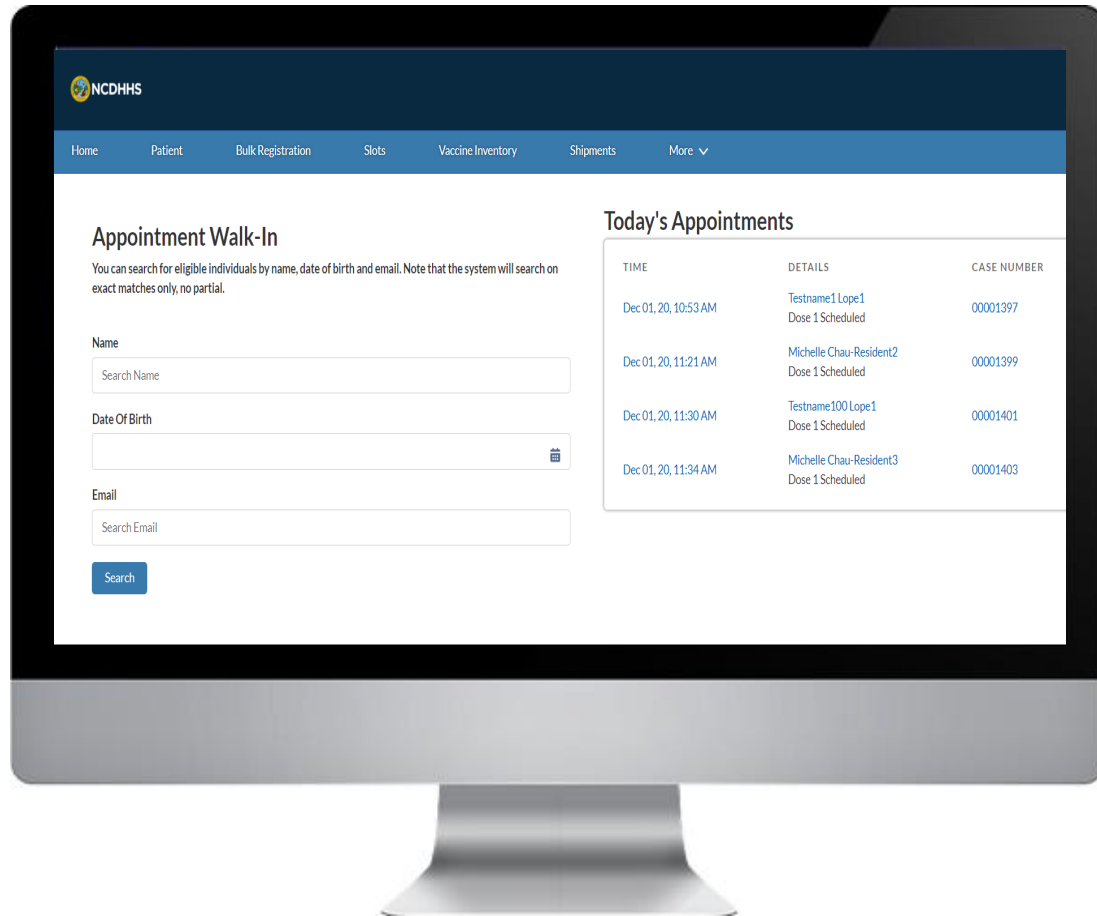
15 min

A Day in the Life of an HCP...

In this module, we'll review the Healthcare Provider experience from both the front desk experience as well as the clinician experience, including check-in all the way through vaccine administration and post-vaccine reminders.



Checking In, Verifying Eligibility, and Administering the Vaccine Overview



In this module, we will review:

1. Verifying the recipient's identity
2. Verifying their eligibility to receive the vaccine
3. Checking them in as a Walk-In
4. Recording the vaccine administration details
5. Understanding post-vaccine administration steps
6. Reviewing lists

Vaccine Administration Key Terms

EUA Fact Sheet

Under section 564 of the Federal Food, Drug, and Cosmetic Act, the FDA Commissioner **may allow unapproved medical products or unapproved uses of approved medical products to be used in an emergency to diagnose, treat, or prevent serious or life-threatening diseases or conditions** caused by CBRN threat agents when there are no adequate, approved, and available alternatives. This is known as **Emergency Use Authorization**. The FDA will issue an Emergency Use Authorization Fact Sheet for each approved vaccine.

Priority Tier

Since there will initially be a very limited supply of COVID-19 vaccines, **North Carolina is implementing a risk-based prioritization approach** based on guidance from the National Academy of Medicine, the CDC's Advisory Committee Immunization Practice, and the NC Institute of Medicine. The **NC population is divided into four priorities based on an individual's occupation, medical history, and age**. The planned **first phase contains health care workers at high risk of exposure to COVID-19 and Long-Term Care Facility staff and residents, followed by frontline workers and adults living in congregate settings** (e.g., migrant farm or fisheries workers, homeless shelters residents, incarcerated individuals) **that have two or more chronic health conditions or are 65 years or older, and staff of homeless shelters, prisons, and jails**.

Eligibility

A recipient's **eligibility will initially be determined by two factors: 1) if the Priority Tier they fall under has been approved** by the NC Department of Health and Human Services to receive the COVID-19 vaccine and 2) **if they have not had COVID-19 in the past 30 days**.

Vial

Vials are used to store vaccines intended for parenteral administration.

Dose

The quantity of COVID-19 vaccine to be administered per usage.

HOME - Appointment Walk-In - Search for the Recipient's Record



[Home](#) [Patient](#) [Bulk Registration](#) [Slots](#) [Vaccine Inventory](#) [Shipments](#) [More](#)

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth



Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER
Dec 01, 20, 10:53 AM	Testname1 Lope1 Dose 1 Scheduled	00001397
Dec 01, 20, 11:21 AM	Michelle Chau-Resident2 Dose 1 Scheduled	00001399
Dec 01, 20, 11:30 AM	Testname100 Lope1 Dose 1 Scheduled	00001401
Dec 01, 20, 11:34 AM	Michelle Chau-Resident3 Dose 1 Scheduled	00001403

HOME - Appointment Walk-In, Verify the Recipient's Identity

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

test

Date Of Birth



Email

Search Email

Search

TIME

DETAILS

CASE NUMBER

Dec 01, 20, 10:53 AM

Testname1 Lope1
Dose 1 Scheduled

00001397

Dec 01, 20, 11:21 AM

Michelle Chau-Resident2
Dose 1 Scheduled

00001399

Dec 01, 20, 11:30 AM

Testname100 Lope1
Dose 1 Scheduled

00001401

Dec 01, 20, 11:34 AM

Michelle Chau-Resident3
Dose 1 Scheduled

00001403

Search Results

Appointment Booking

	Last Name ↑	First Name	Birthdate	Gender	Eligibility Status	
1	Aarons	Jane	2/28/1979	Female	Approved	▼
2	Barbour	Nikki	7/21/1972	Female	Approved	▼
3	Barksdale	Nichelle	7/17/2020	Female	Not Approved	▼

HOME - Appointment Walk-In, Verify the Recipient's Vaccine Eligibility Status

	Last Name ↑	First Name	Birthdate	Gender	Eligibility Status	
1	Aarons	Jane	2/28/1979	Female	Approved	▼
2	Barbour	Nikki	7/21/1972	Female	Approved	▼
3	Barksdale	Nichelle	7/17/2020	Female	Not Approved	▼
4	Brady	Tom	10/28/2001	Male	Approved	▼
5	Chau	Michelle	11/18/1990	Female	Not Approved	▼
6	Chau	Michelle	11/27/1990	Female	Approved	▼
7	Chau-Resident	Michelle	1/20/1990	Female	Approved	▼
8	Chau-Resident2	Michelle	2/2/1990	Female	Approved	▼
9	Chau-Resident3	Michelle	12/1/1990	Female	Approved	▼
10	Chau2	Michelle	11/28/1988	Female	Approved	▼
Load More						

HOME - Appointment Walk-In, Create the Appointment

qa-ncdhhs.cs32.force.com says
Appointment Created Successfully

OK

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email address. Select the search on exact matches only, no partial.

Name

test

Date Of Birth

Email

Search Email

Search

Dec 01, 20, 10:53 AM

Testname1 Lope1
Dose 1 Scheduled

00001397

Dec 01, 20, 11:30 AM

Testname100 Lope1
Dose 1 Scheduled

00001401

Dec 01, 20, 02:03 PM

Michelle Chau-Resident3
Dose 1 Scheduled

00001406

Dec 01, 20, 02:07 PM

Potter Harry
Dose 1 Scheduled

00001407


Appointment Booking

Search Results

Name	DOB	Email	Vaccine Dose Status
<input checked="" type="radio"/> Testname100 Lope1	2011-12-13	ersahil13gupta+v10@gmail.com	
<input type="radio"/> Testname1 Lope1	2000-11-03	ersahil13gupta+v2@gmail.com	
<input type="radio"/> Testname1 Lope1	2020-11-09	ersahil13gupta+v3@gmail.com	
<input type="radio"/> Testname Lope	1986-07-13	ersahil13gupta+v1@gmail.com	



HOME - Appointment Walk-In, Review the Booking!



Home

Patient

Bulk Registration

Slots

Vaccine Inventory

Shipments


More ▾

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth




Email


Search

Today's Appointments

TIME	DETAILS	CASE NUMBER
Dec 01, 20, 10:53 AM	Testname1 Lope1 Dose 1 Scheduled	00001397
Dec 01, 20, 11:30 AM	Testname100 Lope1 Dose 1 Scheduled	00001401
Dec 01, 20, 02:07 PM	Potter Harry Dose 1 Scheduled	00001407

HUMAN SERVICES

Vaccine Administration - Today's Appointments

NCDHHS


[Home](#)[Patient](#)[Bulk Registration](#)[Slots](#)[Vaccine Inventory](#)[Shipments](#)[More](#) ▾

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth




Email

Today's Appointments

TIME	DETAILS	CASE NUMBER
Dec 01, 20, 10:53 AM	Testname1 Lope1 Dose 1 Scheduled	00001397
Dec 01, 20, 11:21 AM	Michelle Chau-Resident2 Dose 1 Scheduled	00001399
Dec 01, 20, 11:30 AM	Testname100 Lope1 Dose 1 Scheduled	00001401
Dec 01, 20, 11:34 AM	Michelle Chau-Resident3 Dose 1 Scheduled	00001403

Vaccine Administration - Verbal Recipient Consent



HomePatientBulk RegistrationSlotsVaccine InventoryShipmentsMore ▾

Vaccine Consent and Medical History

Vaccination Consent

Disclosure Statement

Life threatening allergic reactions to vaccines are very rare. Signs of a serious allergic reaction include: shortness of breath, hoarseness of wheezing, hives, paleness, weakness, elevated heart rate, or severe dizziness. These symptoms may occur within a few minutes, or up to 48 hours after the vaccination. If you are experiencing any of these symptoms, you should contact a healthcare provider immediately.

☐ Verbal Consent: The patient or legal guardian has been provided the benefits and potential adverse reactions, and provides consent to receive the vaccine.

Medical History

Testname1 Lope1
DOB: Nov 9, 2020
Age: 0

Gender
Male

Race
Asian

Ethnicity
Hispanic or Latino

Health Conditions

Covid-19 Positive Test Result
No

Critical / Essential Worker
No

Care Facility Worker / Resident
No

Address
aa
aa, aa 30346

Email Address
ersahil13gupta+v3@gmail.com

Phone Number

Preferred Communication Channel
Email

Next

Vaccine Administration - Capture Immediate Adverse Events

Date and Time of Vaccination
Dec 1, 2020 3:09 PM

Scan or type a barcode

* Product
--Select Vaccine Type

* Manufacturer
--Select Manufacturer

* Available Vaccine Inventory
--Select Vaccine Inventory

Lot Number

Serial Number

NDC

Expiration Date

Immediate Adverse Reactions

☐ Redness

☐ Swelling

☐ Mild Fever

☐ Other

Previous Next

Vaccine Administration - Submit the Vaccine Administration Record

<p>Date and Time of Vaccination</p> <div><div>Dec 1, 2020</div><div>3:09 PM</div></div> <div><div>Scan or type a barcode</div><div>Enter vial</div></div> <p>* Product</p> <div>--Select Vaccine Type--</div> <p>* Manufacturer</p> <div>--Select Manufacturer--</div> <p>* Available Vaccine Inventory</p> <div>-- Select Vaccine Inventory --</div> <p>Lot Number</p> <p>Serial Number</p> <p>NDC</p> <p>Expiration Date</p> <p>Immediate Adverse Reactions</p> <div><input type="checkbox"/> Redness</div> <div><input type="checkbox"/> Swelling</div> <div><input type="checkbox"/> Mild Fever</div> <div><input type="checkbox"/> Other</div> <div>Previous</div>	<p>Ethnicity</p> <p>Hispanic or Latino</p> <p>Health Conditions</p> <p>Covid-19 Positive Test Result</p> <p>No</p> <p>Critical / Essential Worker</p> <p>No</p> <p>Care Facility Worker / Resident</p> <p>No</p> <p>Address</p> <p>aa</p> <p>aa, aa 30346</p> <p>Email Address</p> <p>ersahil13gupta+v3@gmail.com</p> <p>Phone Number</p> <p>Preferred Communication Channel</p> <p>Email</p> <div>Next</div>
---	---



Post Vaccine Administration Reminders

Once the **VACCINE ADMINISTRATION IS COMPLETE** and you submit the record in CVMS, please **SHARE** a few **REMINDERS** with the recipient.

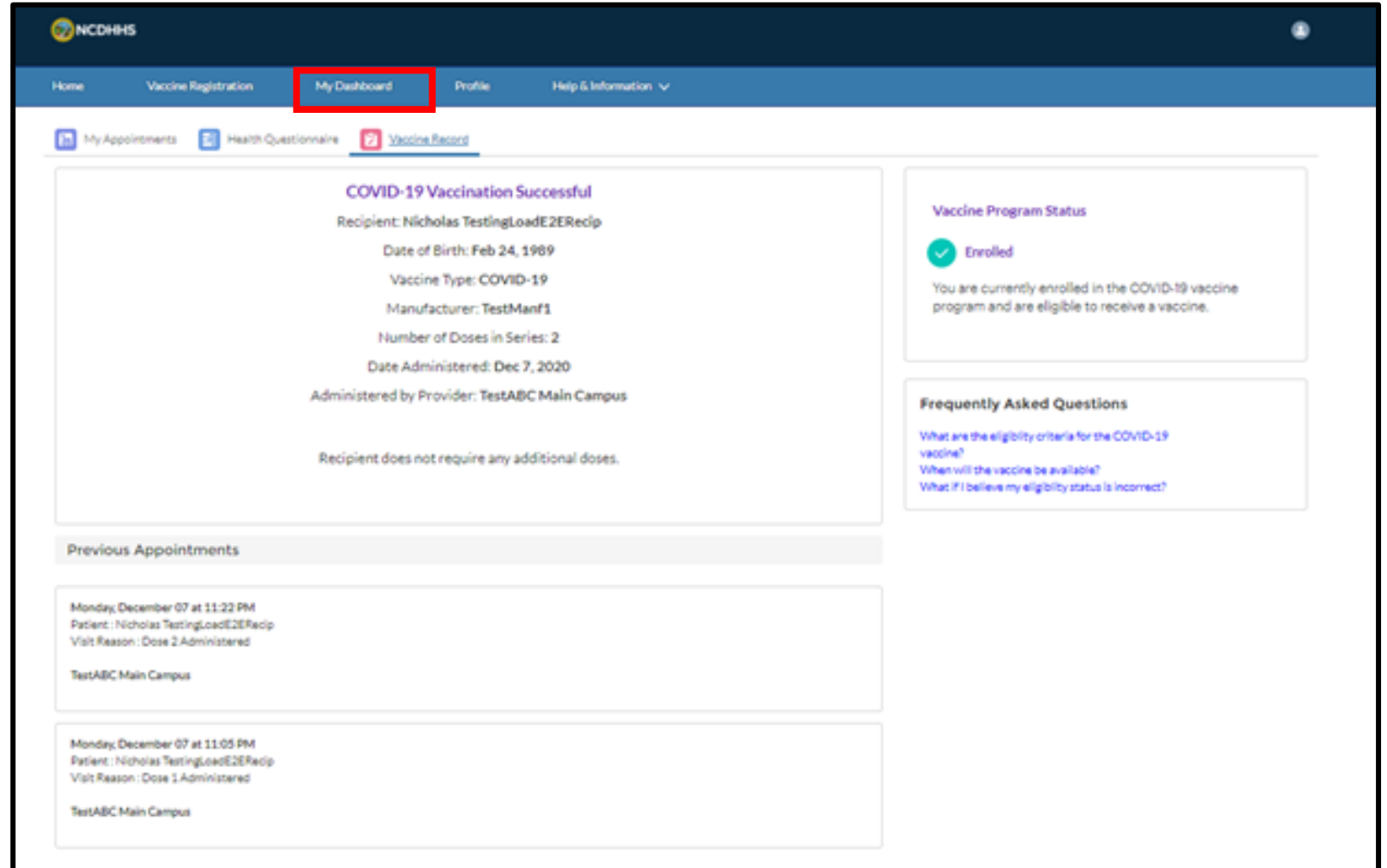
1. The recipient will receive two **SECOND DOSAGE REMINDER NOTIFICATIONS**, the first reminder is **24 HOURS** after and the second is **ONE WEEK AFTER** the first dosage is administered. It will be important to remind the recipient about the timing requirements for the second dosage, if applicable.
2. The recipient will receive a **PROOF OF VACCINATION NOTIFICATION** instructing the recipient to access their vaccination details via the **CVMS RECIPIENT PORTAL**. The proof of vaccination page will be automatically generated for the recipient.

NOTE: COVID-19 vaccination record cards will be provided as part of vaccine ancillary kits. Providers should provide a completed card with accurate vaccine information (i.e., vaccine manufacturer, lot number, date of first dose administration, and second dose due date) to each recipient to ensure a basic vaccination record is provided. Providers should encourage recipients to take a picture of the vaccine card with their cell phone to remind them of the next due date for the second dose, and keep the card in case CVMS is not available when they return for their second dose.

Viewing the Proof of Vaccine in the CVMS Recipient Portal

Recipients will be able to view their **PROOF OF VACCINATION** on the **MY DASHBOARD PAGE** in the **CVMS RECIPIENT PORTAL**.

1. From the **APPOINTMENT TAB** navigate to the **VACCINE RECORD**.
2. **VIEW PROOF OF VACCINE.**



The screenshot displays the CVMS Recipient Portal interface. The top navigation bar includes links for Home, Vaccine Registration, My Dashboard (highlighted with a red box), Profile, and Help & Information. Below the navigation bar, there are tabs for My Appointments, Health Questionnaire, and Vaccine Record (which is the active tab). The main content area is titled "COVID-19 Vaccination Successful" and displays the following information:

- Recipient: Nicholas TestingLoadE2ERecip
- Date of Birth: Feb 24, 1989
- Vaccine Type: COVID-19
- Manufacturer: TestManf1
- Number of Doses in Series: 2
- Date Administered: Dec 7, 2020
- Administered by Provider: TestABC Main Campus
- Recipient does not require any additional doses.

Below this information is a section titled "Previous Appointments" which lists two appointments:

- Monday, December 07 at 11:22 PM
Patient: Nicholas TestingLoadE2ERecip
Visit Reason: Dose 2 Administered
TestABC Main Campus
- Monday, December 07 at 11:05 PM
Patient: Nicholas TestingLoadE2ERecip
Visit Reason: Dose 1 Administered
TestABC Main Campus

On the right side of the dashboard, there is a "Vaccine Program Status" section showing a green checkmark and the word "Enrolled", with a note: "You are currently enrolled in the COVID-19 vaccine program and are eligible to receive a vaccine." Below this is a "Frequently Asked Questions" section with three questions:

- What are the eligibility criteria for the COVID-19 vaccine?
- When will the vaccine be available?
- What if I believe my eligibility status is incorrect?

When the Recipient is NOT Eligible for the Vaccine

Home Recipient Help & Information ▾

Person Account
Michelle Chau

Eligibility Status: Not Approved Priority: Phase 1a Recipient Dose Status: Dose 1 Scheduled

RELATED **DETAILS**

Account Name	Birthdate
Michelle Chau	11/18/1990
Gender	Critical/Essential Worker
Female	No
Race	Tribal Community
Asian	No
Medical Health Conditions	Recipient Dose Status
None	Dose 1 Scheduled
Long-term care worker/resident	
No	
Employer	
Risk Level	
Recipient Type	
Priority	
Phase 1a	
Eligibility Status	
Not Approved	

When you review a **RECIPIENT'S ELIGIBILITY**, you may discover that they are **NOT APPROVED** to receive the vaccine at this time. In this situation, you will need to inform the recipient that they will not be able to receive the vaccine.

You can review the recipient's **HEALTH QUESTIONNAIRE RESPONSES** on the **recipient PROFILE** to potentially understand why; however, *you will **NOT** be able to **EDIT** the recipient's profile.*

1. From the home page, go to the **PATIENT TAB**
2. Search for the recipient in the **ALL RECIPIENTS LIST VIEW**
3. Click the **RECIPIENT NAME**
4. Click on **DETAILS**

*If the recipient informs you that their health information is **NOT CORRECT**, ask the recipient to **UPDATE** their recipient data in the **RECIPIENT PORTAL**.*



In this module, we reviewed:

1. **Verifying** the recipient's **identity**
2. **Verifying** their **eligibility** to receive the vaccine
3. **Checking them in** as a Walk-In
4. Recording the **vaccine administration details**
5. Understanding **post-vaccine** administration **steps**
6. Reviewing Lists

Do you have any questions?



What to Expect Next

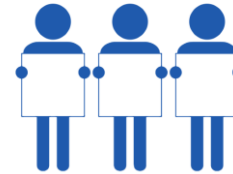
 5 min

A Range of CVMS Training and Support Resources

NC DHHS will provide a range of tools and methods for CVMS and vaccine training including: communications, user guides, live trainings, and helpdesk support.



Communications: Includes CVMS Provider Portal announcements, enhancement updates, training event invitations, and information about new user guides and video demonstrations. Communications will be tailored to individual roles and responsibilities.



Live Training: Live training will include step-by-step demonstrations of key tasks in CVMS, with opportunities to ask questions and do “replays” to take a closer look with the trainers. A key feature of live training is its high engagement and interaction from trainees.



User Guide: Step-by-step guide that combines text instructions and screenshots to walk users through each task in the CVMS Provider Portal. It breaks down tasks into key steps and includes annotated screen shots and helpful tips.



Helpdesk: email help for all CVMS users during published hours for all CVMS related questions.

Initial training of Phase 1 enrolled Providers is currently in progress.

The CVMS Helpdesk can be reached via

Email: CVMS-HELP@DHHS.NC.GOV



Helpdesk: email help for all CVMS end-users (i.e. providers, recipients, employers) during published hours for CVMS tool-based questions. NC State staff and contractors will help answer questions coming to the helpdesk.



Types of questions: questions can be as simple as how to complete a task in the system to more involved process questions. Agents will either address the question directly or help route to the appropriate resource:

- How do I log in?
- Where is the recipient upload template?
- What is this error message?



Thank You!