North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Vaccine Administration User Guide

Version 4
January 29, 2021
If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

* On the home page of the CVMS Help Desk Portal, select the "Vaccine Provider" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:
1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code
   NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add “NCA” to the front of the six-digit PIN#)
   For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021
3. You will receive an e-mail with your username and temporary password to log into the portal
# Table of Contents

<table>
<thead>
<tr>
<th>Topic</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccine Administration Overview and Process</td>
<td>4 - 7</td>
</tr>
<tr>
<td>Enter &amp; Submit Vaccine Administration Record</td>
<td>8 – 17</td>
</tr>
<tr>
<td>Edit Vaccine Administration Details After Submission</td>
<td>18 – 26</td>
</tr>
<tr>
<td>Edit Vaccine Administration Recipient</td>
<td>27 – 32</td>
</tr>
<tr>
<td>Post-Vaccine Administration Reminders</td>
<td>33 – 34</td>
</tr>
<tr>
<td>Appendix</td>
<td>35 – 38</td>
</tr>
</tbody>
</table>
Vaccine Administration Overview and Process
Administering the COVID-19 vaccine typically involves:

1. Confirming Recipient consent to receive the COVID-19 vaccine
2. Recording the Vaccine Administration details
3. Understanding post-Vaccine Administration reminders

The processes included in this training are for the Healthcare Provider and Healthcare Location Manager profiles.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari (Internet Explorer or Edge non-Chromium are not supported)

Now, let’s get started!
Recipient receives COVID-19 vaccination.

Healthcare Provider enters Vaccine Administration information and submits Vaccine Administration record.

Healthcare Provider creates the Appointment Booking.

Healthcare Provider opens the Appointment Booking and begins Vaccine Administration process.


Healthcare Provider provides Recipient with V-safe Information Sheet and a few reminders on second dosage, Proof of Vaccination, and Adverse Event reporting.

The Vaccine Administration process is now complete.
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.
Confirm Location of Operations
Step 1 of 4: Verify Location for Operations

Before you begin logging VACCINE ADMINISTRATION details, you will need to verify which location you are operating in.

The current location you are operating in is displayed at the top left of the screen. If the location is correct, no further action is required.

Tips
To learn more about getting access to other locations, speak to your location’s VACCINE COORDINATOR.
Step 2 of 4: Begin Switching Locations

If the location needs to be changed (e.g., you are operating in a different clinic location than the one currently displayed), continue following the instructions in this section.

1. Select the **SWITCH LOCATIONS** button
2. A pop-up window will appear asking you to enter the name of the location you would like to be operating in
Step 3 of 4: Submit New Location To Operate In

1. Enter at least three letters of the location name that you would like to operate in
2. Search results will populate in the “smart result box” based on your access
3. Select the location you would like to operate in
4. Click SUBMIT

Note: You must enter a search query for results to begin populating in the “smart result box”. Result options will only be for those locations that you have access to.

Tips
To see a list of locations you have access to operate in / can search for, speak to your location’s LOCATION MANAGER or your location’s VACCINE COORDINATOR.
Step 4 of 4: Confirm Successful Location Switch

Verify that the location successfully switched by checking the display at the top left of the Home Tab.

Audience

Healthcare Provider

Healthcare Location Manager
Enter & Submit Vaccine Administration Record
Step 1 of 9: Recipient Appointment Booking

When a **RECIPIENT** walks in to receive their COVID-19 vaccine, the Healthcare Provider who initially verifies their Eligibility and identity will create an Appointment Booking for the Recipient.

The Healthcare Provider who will administer the COVID-19 vaccine will select the Recipient under **TODAY’S APPOINTMENTS** on the **HOME PAGE**.

Audience

- Healthcare Provider
- Healthcare Location Manager

Tips

See Appendix for options if recipient’s eligibility status is Not Approved.
Step 2 of 9: Begin Vaccine Administration

When you are ready to begin the **VACCINE ADMINISTRATION PROCESS**, navigate to the **HOME PAGE** and find the **CORRECT BOOKING**. The Appointment Booking will initiate the Vaccine Administration process, where you will **VERIFY THE RECIPIENT’S IDENTITY**, **REVIEW THEIR MEDICAL HISTORY**, **CAPTURE THE VACCINE DETAILS**, and more.

1. On your Home Page, locate the **TODAY’S APPOINTMENTS** section
2. Click the **CORRECT APPOINTMENT BOOKING** for the Recipient

**Tips**
Some users can view **TODAY’S APPOINTMENTS** for multiple locations. Be sure to click on the correct appointment booking for the desired location.
Step 3 of 9: Receive Verbal Consent

Clicking on the Recipient’s Appointment Booking takes you to the PATIENT VERIFICATION & SCREENING page.

1. Review the Recipient’s health information on the right-hand side of the screen and click NEXT
2. On the VACCINE CONSENT AND MEDICAL HISTORY page, read the DISCLOSURE STATEMENT to the Recipient
3. After you RECEIVE VERBAL CONSENT, you can CHECK the check box indicating that consent was provided and click NEXT

Note: The Recipient’s MEDICAL HISTORY will be displayed on the right-hand side of the screen throughout the entire Vaccine Administration Process.
Step 4 of 9: Provide the EUA Fact Sheet

Before you administer the COVID-19 vaccine, you must also PROVIDE the EMERGENCY USE AUTHORIZATION (EUA) FACT SHEET and the V-SAFE INFORMATION SHEET to the Recipient or guardian.

1. Obtain copies of the EUA Fact Sheet at this website (There will be different EUAs for different vaccines): https://www.fda.gov/media/144414/download (Pfizer EUA)
2. Obtain copies of the V-safe Information Sheet at this website: https://immunize.nc.gov/providers/ncip/pdf/v_safe_poster_508.pdf
3. Provide the Recipient or guardian with the EUA Fact Sheet prior to vaccination.
4. Ask the Recipient if they have any questions about the risks and benefits of receiving the COVID-19 vaccine.
5. Counsel the Recipient on the importance of enrolling in V-safe to report any adverse events following vaccination.
Step 6 of 10: Review the Vaccine Administration Details

Once you receive the Recipient’s consent and provide them with the appropriate EUA Fact Sheet, you will continue to the **VACCINE ADMINISTRATION** page. This page is where you will CAPTURE KEY INFORMATION about the **COVID-19 VACCINE ADMINISTERED**.
Step 7 of 10: Vaccine Administration Details for the Second Vaccine Dose

If your Recipient has already RECEIVED THE FIRST DOSE of the COVID-19 vaccine, you will see FIRST DOSE DETAILS at the top of the VACCINE ADMINISTRATION PAGE.

Dose 1 Details will include:
- Date and Time
- Administered By
- On Behalf Of (Clinician)
- Location
- Vaccine Inventory
- Vaccine Product
- Lot Number

Alternately, if a Recipient received their first dose outside of CVMS (e.g., out of state, through a Long-Term Care facility), the FIRST DOSE DETAILS will not appear. You may still mark the dose as a SECOND DOSE. In that instance, a warning label will appear at the top of the screen prompting you to verify that the Recipient has received their first dose.
Step 8 of 10: Enter Vaccine Administration Details

On the VACCINE ADMINISTRATION page, you will capture all VACCINE DETAILS.

1. Populate all REQUIRED vaccination details
   - Injection Site
   - Dose
   - Route
   - Date & Time of Vaccination (This field will default to the current date and time, but can be edited to record a vaccine administered in the past)

Note: The field ON BEHALF OF (CLINICIAN) allows you to enter information on behalf of another clinician who administered the COVID-19 vaccine.

Tips

Use the drop-down for the ON BEHALF OF (CLINICIAN) field and type the first letter of the clinician’s name.

If the individual completing the form is the person who administered the vaccine, DO NOT ENTER anything in the ON BEHALF OF (CLINICIAN) field.
Step 9 of 10: Enter Vaccine Administration Details

1. Continue populating all **REQUIRED** vaccination details
   - Vaccine Product (Vaccine Type)
   - Available Vaccine Inventory (what lot?)

2. Enter any additional notes that are relevant in the **NOTES** text field

3. **REVIEW ALL VACCINE DETAILS**

4. Click **NEXT**

*If you are administering a second COVID-19 vaccine dose, please be sure to confirm the COVID-19 vaccine is from the **SAME MANUFACTURER** as the first COVID-19 vaccine dose.*

**MANUFACTURER, LOT NUMBER, SERIAL NUMBER, NDC NUMBER** and **EXPIRATION DATE** will **AUTO POPULATE** once you select the Available Vaccine Inventory.
Step 10 of 10: Finish an Appointment

The final page of the Vaccine Administration Process is the SCHEDULE FOLLOW-UP page. This page will remind you to tell the Recipient to schedule their second dose appointment. Click FINISH APPOINTMENT to close the appointment and bring up the HOME PAGE.

If this is a second dose, the SCHEDULE FOLLOW UP page will not appear, and you will instead be routed back to the HOME PAGE.

See the next section for a few POST-APPOINTMENT REMINDERS.
Edit Vaccine Administration Details
After Submission
Step 1 of 8: Navigate to Appointments Tab

If a RECIPIENT has incorrect details entered during Vaccine Administration, the Healthcare Provider MUST EDIT the details to ensure data accuracy.

To begin, navigate to the APPOINTMENTS tab.
Step 2 of 8: Locate Recipient

Clicking on the Appointments tab takes you to a list view of all Appointments for your location. Verify that you are currently logged in to the same location that the Recipient received their vaccine.

**Audience**
- Healthcare Provider
- Healthcare Location Manager

**Tips**
The APPOINTMENTS tab will default to show you appointments that were scheduled for the same day you are logged in.
Step 3 of 8: Select Appointment to be Updated

To begin editing the details of the VACCINE ADMINISTRATION, you must first locate the correct APPOINTMENT RECORD.

1. Enter the name of the Recipient in the Search field, and adjust the date range to capture the date of the appointment that needs updating.
2. Click SEARCH.
3. Click the CORRECT APPOINTMENT RECORD for the Recipient. The correct record will be the one that shows a VACCINE STATUS as either DOSE 1 ADMINISTERED or DOSE 2 ADMINISTERED.

Tips
Alternatively, you may search for the Recipient via the RECIPIENT TAB, locate their Recipient record, and click on their appointment record.
Step 4 of 8: Review Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will display for the Recipient.

1. All Vaccination details are visible including:
   - Date and Time
   - Vaccine Product / Inventory
   - Injection Site
   - Route
   - Administered By
   - On Behalf of (Clinician)
   - Notes

2. To begin editing the details of the **VACCINE ADMINISTRATION**, select any **PENCIL ICON** to the right of a field
Step 5 of 8: Edit Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will now appear as editable fields. As you edit fields, they will highlight yellow to indicate that you've made a change.

1. **Edit** any of the following fields to the correct information:
   - Date / Time of Vaccination
   - Injection Site
   - Route
   - Administered By
   - On Behalf of (Clinician)
   - Notes

2. **Do not edit** any of the following fields:
   - Account Name
   - Cancellation Reason
   - Appointment Date / Time
   - Case Owner

3. **Click SAVE**
Step 6 of 8: Change Vaccine Inventory

To edit the VACCINE INVENTORY field of the VACCINE ADMINISTRATION, you must select the CHANGE VACCINE INVENTORY button.

Tips
Review the next section of this User Guide for instructions on how to use the CHANGE RECIPIENT button.
Step 7 of 8: Select an Updated Vaccine Inventory

A pop-up window will appear inviting you to Change Vaccine Inventory.

1. Click the **SEARCH VACCINE INVENTORIES** field, which will populate a list of available inventories for your location
2. Locate and click the correct inventory, or type the name of the inventory to quickly find it
3. Click **FINISH**

**Tips**
Although VACCINE PRODUCT is not an editable field, changing the VACCINE INVENTORY to an inventory of a different product will automatically update the VACCINE PRODUCT field.
At any point, you can review the history of changes made to the Vaccine Administration details.

1. From the Appointment Record, click the RELATED tab
2. View CASE HISTORY to see the date, time, user, old value, and new value for each individual field that was changed
Edit Vaccine Administration Recipient
When a HEALTHCARE PROVIDER enters Vaccine Administration details for the wrong RECIPIENT, the Healthcare Provider must change the recipient for the entered Vaccine Administration details. To begin, navigate to the RECIPIENT tab.

**Tips**
Healthcare Providers can only change Vaccine Administration Recipient for Recipients who received their vaccine through the same location as the Healthcare Provider.
Step 2 of 5: Locate Recipient

Clicking on the **RECIPIENT TAB** takes you to a screen to search all Recipients in CVMS.

1. Type in the incorrect recipient's name in the search box
2. Click **SEARCH**
3. Select the recipient's name
Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

1. Click on the **RELATED** tab under the recipient’s name to view appointment information.
2. Select the appointment record that needs to be changed to another recipient (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED** or **DOSE 2 ADMINISTERED**).
Step 4 of 5: Change Recipient

Selecting the appointment record takes you to the appointment details screen. Click **CHANGE RECIPIENT** in the top right corner to transfer the **VACCINE ADMINISTRATION** details to the correct recipient.
Step 5 of 5: Locate Correct Recipient

A Change Recipient pop-up box will appear.

1. Search for the correct recipient in the **UPDATED CONTACT NAME** field
2. Click **FINISH**

3. A Success confirmation pop-up should appear at the top of the screen

**Tips**
The status of the incorrect Recipient will be reverted to their previous status, (e.g., ‘Dose 1 Administered’ will revert to ‘Registered’).

The correct Recipient’s status will be updated to reflect the administered vaccine (e.g., updated from ‘Registered’ to ‘Dose 1 Administered’).
Post-Vaccine Administration Reminders
Post Vaccine Administration Reminders

After recipients received a first dose, they will receive **TWO (2) SECOND DOSAGE REMINDER NOTIFICATIONS** of the timing requirements for the second dosage:

1. The first reminder is **24 HOURS** after

2. The second is **ONE WEEK AFTER** the first dosage is administered.

They also will receive a **NOTIFICATION** informing you of your **PROOF OF VACCINATION**. This will be automatically generated for them.

**NOTE:** COVID-19 vaccination record cards should be provided to the Recipient or their guardian after the Recipient receives their COVID-19 vaccine.

The Recipient can request you provide a completed vaccination record card with important information about the COVID-19 vaccine they received (i.e., vaccine manufacturer, lot number, date of first dose administration, and second dose due date).

You can also suggest that they take a picture of their vaccination record so they can remember the type of vaccine they received and their second dose due date.

**Tips**

Learn more about viewing a Recipient’s Proof of Vaccination in the **CVMS Provider Portal Viewing Proof of Vaccination User Guide.**
When the Recipient’s ELIGIBILITY STATUS is incorrect

If you have a recipient that has ELIGIBILITY of NOT APPROVED and you determine they are eligible, then there is two options.

**Option #1:** If the Recipient informs you that their health information is NOT CORRECT, ask the Recipient to UPDATE the COVID-19 Vaccination (Health) Questionnaire in the CVMS RECIPIENT PORTAL or you can update the Recipient’s information on their behalf.

**Option #2:** You can administer the vaccine if you believe the recipient is eligible, regardless of the ELIGIBILITY status in CVMS.
Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *Asterisks* are used to denote required information.
- A Toggle can be clicked to see selectable options.
- A Pen can be clicked to make edits to the field.
- Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
- A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at [https://ncgov.servicenowservices.com/csm_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium to access CVMS.
- For more information on supported browsers, see [https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)
- Note: Internet Explorer and Edge (Non-Chromium) are not compatible with CVMS.
# User Guide Change Log

## Key Items:
- **Date of Change**: Date that any updates were made to the User Guide
- **Changes Made**: Summary of the updates made within the User Guide
- **Impacted Slides**: Specific slides that were updated or changed
- **Author**: The user that made the updates to the User Guide

<table>
<thead>
<tr>
<th>Version</th>
<th>Date of Change</th>
<th>Changes Made</th>
<th>Impacted Slides</th>
<th>Author</th>
</tr>
</thead>
</table>
| 1       | 12/18/2020     | • Added Patient Verification and Screening page, Removed mention of Adverse Reaction Annotation, clarified On Behalf Of (Clinician), added Schedule Follow-up Page  
• Updated Process for Recipients that are not Eligible yet / Not Approved | 9-18, 22 | Steve DiGangi |
| 2       | 1/10/2021      | • Removed any mention of the 2 CVMS Vaccine Support emails.  
• Added CVMS Help Desk Portal information | 1, 2, 22 | Courtney Seward |
| 3       | 1/13/2021      | • Updated screenshots to include updated branding, Appointments tab, Second Dose warning label, and new Vaccine Route  
• Included information about Recipients who may receive a first dose outside of CVMS | 5, 9-11, 13-17, 21 | Steve DiGangi |
| 4       | 1/28/2021      | • Added Location Switcher button explanation section  
• Added new section: Edit Vaccine Administration Details After Submission  
• Added new section: Edit Vaccine Administration Recipient | 8-12, 23-31, 32-37 | Steve DiGangi, Kaitlin Gates |