

NORTH CAROLINA COVID-19 RESPONSE: End-to-end Provider Enrollment Process

This guide contains pertinent information to support Healthcare Provider's readiness to manage and administer the COVID-19 vaccine.

Who can enroll in the COVID-19 Vaccine Management System (CVMS)?

- **Eligible Healthcare Providers** - who are interested in administering the COVID-19 vaccine and can self-register in the CVMS PROVIDER ENROLLMENT PORTAL

Before getting started in CVMS, it is recommended that a representative from your organization should:

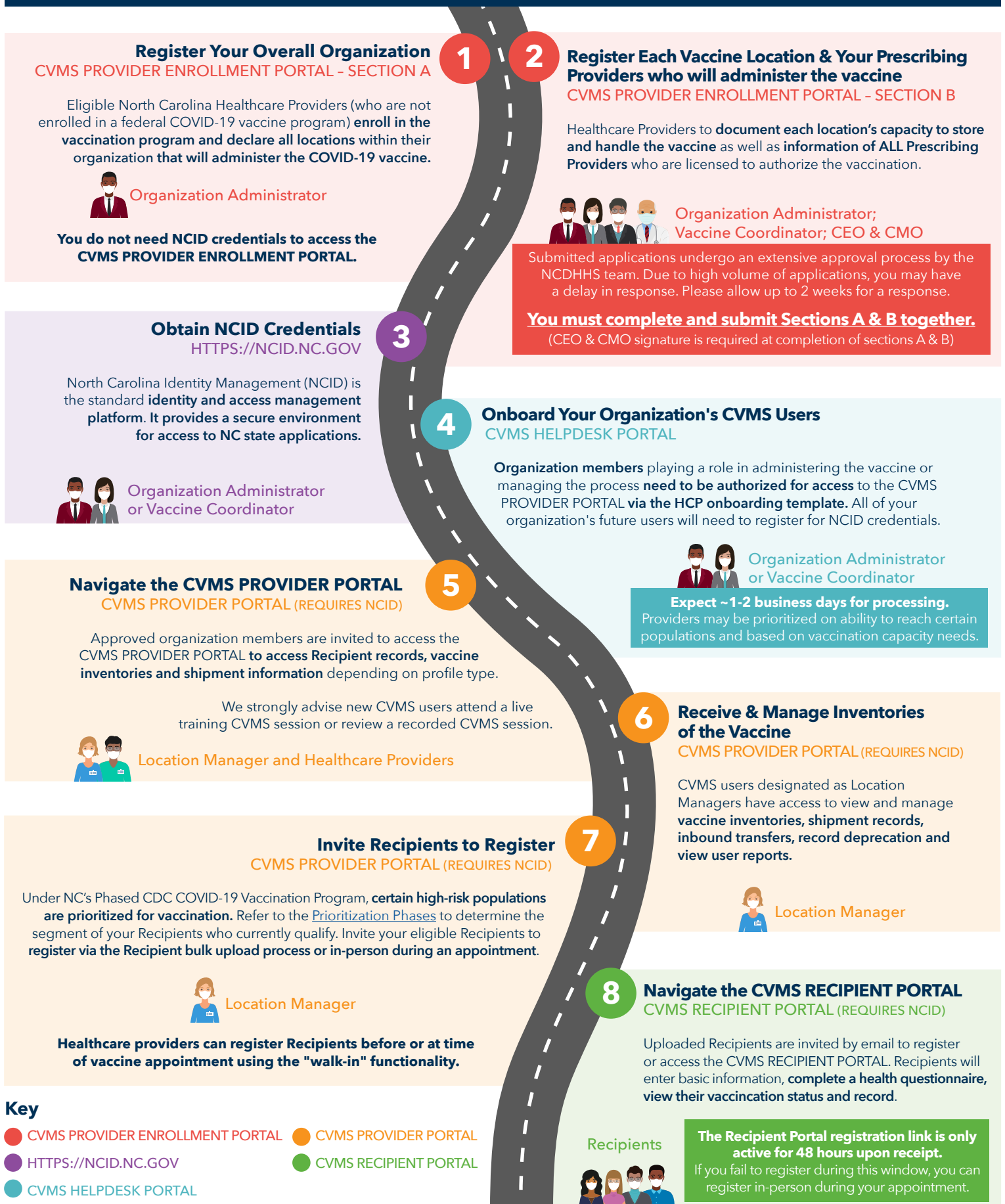
- Attend a live CVMS Provider Enrollment Training Session ([CVMS Training Schedule](#))
- Review and complete the [COVID-19 Vaccine Readiness Checklist](#) before step 4 below
- Identify a single point of contact for your employees to send questions or provide feedback related to the administration COVID-19 Vaccine ([FAQS](#))

*Enrollment can be initiated at <https://covid-enroll.ncdhhs.gov>

As a reminder, COVID-19 vaccine providers must be qualified under the CDC agreement to prescribe COVID-19 vaccines and authorized under the appropriate NC licensing authority. Enrolled COVID-19 vaccine providers must be credentialed/licensed in North Carolina.

Please understand that while currently qualified providers are welcome to enroll, requests will be addressed in an order aligned with the [Prioritization Phases](#) and the timeline for approval will vary. The State will continuously reassess enrollment prioritization based on needs.

CVMS ENROLLMENT & ONBOARDING



Step-by-Step Instructions for CVMS Enrollment

STEP 1: Register Your Overall Organization

Organization Administrators can submit an enrollment application for the CVMS PROVIDER ENROLLMENT PORTAL in one of two ways:

1. Through an email invitation to register from a NCDHHS Immunization Coordinator
2. Initiating self-registration directly at <https://covid-enroll.ncdhhs.gov/>

Follow steps within the CVMS PROVIDER ENROLLMENT PORTAL to complete Section A. To complete this section you will be asked for:

- Organization details
- Organization Administrator contact details

- Location(s) administering vaccinations and their Vaccine Coordinator contact details
- Executive Officers (CEO & CMO) contact details

Once all required fields have been completed for Section A, confirm details are correct and submit to progress to Section B.

LINKS: [CVMS Provider Enrollment Account Registration and Password Reset User Guide](#)

[CVMS Provider Enrollment Organization Administrator User Guide](#)

STEP 2: Register Each Vaccine Location & Your Prescribing Providers who will administer the vaccine

To complete Section B, the Vaccine Coordinator will receive a welcome email to register for the CVMS PROVIDER ENROLLMENT PORTAL. To complete this section you will be asked for:

- Location details
- Primary and Back-up Vaccine Coordinator contact info
- Shipment availability
- Provider type and setting
- Population(s) served
- Storage capacity and storage unit specifications
- List of Providers, including license numbers, with prescriptive authority

*For Locations with 25 or more practicing providers who will be administering the COVID-19 vaccine, you can receive support entering your providers into CVMS via the provider bulk upload process:

- Please use the [Provider Bulk Upload Template](#) and submit a ticket via the [CVMS HELPDESK PORTAL](#)
- If your location needs assistance with bulk upload, please submit Section B WITHOUT adding Providers in CVMS

Once all required fields have been completed for Section B, the Vaccine Coordinator must:

- Review and sign the Storage and Handling Attestation
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement

Upon completion of Section B, the organization's CEO and CMO will receive a welcome email to register and access the CVMS PROVIDER ENROLLMENT PORTAL to:

- Review submitted organization information
- Provide an e-signature to approve submitted organization information
- Review and sign the Storage and Handling Attestation
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement

You must complete and submit Sections A & B together. The CEO and CMO signature is required at completion of sections A & B.

Submitted applications undergo an extensive approval process by the NCDHHS team. You will be notified if your file has been approved, denied or requires additional information.

Due to high volume of applications, you may have a delay in response. Please allow up to 2 weeks for a response.

LINKS: [CVMS Provider Enrollment Vaccine Coordinator User Guide](#)

[CVMS Provider Enrollment Responsible Officer User Guide](#)

[Practicing Provider Bulk Upload Template](#)

[CVMS Provider Enrollment Portal Complete Storage and Handling Attestation Job Aid](#)

STEP 3: Obtain NCID Credentials

All Healthcare Providers and Employees who require access to CVMS with the intention of managing the vaccine distribution process must register for NCID credentials.

If you do not have a Business NCID, go to <https://NCID.NC.GOV>. Use the following steps to obtain your credentials and store them some place safely:

- Click register
- Select Business
- Choose a username
- Confirm email address by clicking link in the automated verification email
- Complete all required fields
- Set up security questions
- Finish & submit

Email your NCID username to your assigned Vaccine Coordinator or Organization Administrator who will onboard your organization and grant you access to the CVMS PROVIDER PORTAL. Please note there is a 24-hour approval process.

IMPORTANT: If you are employed or responsible for two or more locations for your organization, you only need to create a SINGLE NCID login to access each of your locations.

LINKS: [NCID Registration Link](#)

STEP 4: Onboard Your Organization's CVMS Users

Vaccine Coordinators (or similar role within your organization) will need to complete the HCP User Onboarding Template for users in their organization who will need access to CVMS. Types of users may include:

- **Healthcare providers** administering the vaccine and checking in recipients
- **Location Managers** responsible for supervising vaccine inventories and uploading Recipient access to CVMS

To begin, download the HCP User Onboarding Template (can also be opened from the CVMS Readiness Checklist)

Save and rename the file according to the following naming convention: [Insert Organization] HCP [Insert Date].xlsx

Instructions for filling out the HCP User Onboarding Template:

Complete Preparer Information

If there are any issues or errors with the HCP User Onboarding Template, a member of the NCDHHS COVID-19 Vaccine Program Team will need to contact you.

The preparer of the file will need to enter their contact information:

- Organization name
- Preparer name
- Role/Title
- Email address
- Phone number

Add User Data to HCP User Onboarding Template

For all Healthcare Providers or Employees who require access to the CVMS PROVIDER PORTAL, you will need to collect and enter the following information into the template:

- First name and Last name
- Email address
- NCID username
- Profile (Drop-down field, select either "Healthcare Provider" or "Healthcare Location Manager")
- Location information

If a user needs to be associated with multiple locations, you will need to create a line item for each location. Make sure to duplicate the same user details in the first five columns for all locations.

Ensure that the First name, Last name, and Email address matches the information used to register for an NCID. Any discrepancy will delay the user from receiving system access to CVMS.

STEP 5: Navigate the CVMS PROVIDER Portal

Approved users will receive an automated welcome email from the CVMS PROVIDER PORTAL inviting them to log-in.

On the CVMS PROVIDER PORTAL log-in page, click the blue NCID button.

Use your NCID username and password to sign-in.

In the CVMS PROVIDER PORTAL, TABS help you navigate between pages. The TABS you see are based on your user profile, Healthcare Location Manager or Healthcare Provider.

Healthcare Location Managers tabs:

- Home
- Bulk Registration
- Shipments
- Appointments
- Recipients
- Vaccine Inventory
- Help & Information
- Reports

Verify & Save Data to Submit File

Review all required Healthcare Provider User Data that you have entered and save the file

While processing your HCP User Onboarding Template, the team may encounter issues or errors within the file. If any employees or individuals included in your HCP User Onboarding Template failed, you will receive an email notification from the IT Service Desk (ncgov@servicenowservices.com)

Submitting the HCP User Onboarding Template:

Create a new ticket or refer to your existing ticket on the CVMS Vaccine

We have streamline our processes for onboarding providers to CVMS and have launched a new intake form available on the CVMS HELPDESK PORTAL website here: https://ncgov.servicenowservices.com/csm_vaccine. Please follow the below instructions:

1. Visit the CVMS HELPDESK PORTAL website (linked above) and login with your account
2. Click on the "HCP User Onboarding Template / Recipient Bulk Upload" tile to create a ticket
3. Submit a case via the intake form and attach your .xlsx file(s)
4. Your ticket will be automatically routed to our onboarding team for processing

Please expect 1-2 business days for the NCDHHS team to process your file.

Once your users have been granted system access to the CVMS PROVIDER PORTAL, each user will receive a system auto-generated welcome email with instructions on how to complete account setup.

LINKS: [HCP User Onboarding Process User Guide](#)
[HCP User Onboarding Template](#)
[CVMS HELPDESK PORTAL Form](#)

Healthcare Providers tabs:

- Home
- Help & Information
- Recipients
- Appointments

It is strongly advised that Healthcare Providers and Locations managers who recently received access to the CVMS PROVIDER PORTAL sign-up to attend a live training session for how to navigate the portal.

For training session description and agendas, please refer to the Live Learning Sessions section on the Immunization branch site: <https://immunize.nc.gov/providers/covid-19training.htm>

LINKS: [CVMS PROVIDER PORTAL](#)

STEP 6: Receive & Manage Inventories of the Vaccine

Users designated as a "Healthcare Location Manager" in the CVMS PROVIDER PORTAL will have the ability to receive and process their COVID-19 Vaccine inventories through the system.

If you are responsible for multiple locations within your organization, you will be able to switch locations within the CVMS PROVIDER PORTAL to view and manage vaccine inventories for each of your locations.

It is important to maintain accurate COVID-19 Vaccine inventory levels for the location(s) that you support to remain in alignment with the CDC's COVID-19 Vaccine guidelines.

Once a COVID-19 Vaccine Inventory shipment is on its way, a vaccine shipment record will be available for you to review in your shipments tab.

You will also receive an email notification when a Vaccine inventory shipment is on its way to your location.

- At the top of your home page, locate the Shipments tab
- Click Shipments
- After clicking Shipments, you will be directed to the Shipments page

You will see a List view on your page. To see all your Shipment Records, you will have to switch to the All Shipment Records list view. You will be able to switch back and forth between list views.

On the Shipment record, you will be able to review details about your expected order. On the Shipment record, click on the Details tab.

Primary Vaccine Coordinators will be notified via email from Pfizer or McKesson (Moderna) if a vaccine shipment has been processed for location(s) they support.

Please reference the user guides in the Links section, for detailed instructions on how to complete the following actions relating to your vaccine inventories:

Adding COVID-19 Vaccine Inventory

When you physically receive a COVID-19 vaccine inventory shipment, you will want to add the inventory to your location's overall COVID-19 Vaccine inventory. Processing your COVID-19 Vaccine shipments correctly will ensure that your COVID-19 Vaccine levels are accurate for your reporting.

STEP 7: Invite Recipients to Register

Complete the Recipient Bulk Upload Template by entering the following information in the template:

- Employee/Recipient First Name
- Employee/Recipient Last Name
- Employee/Recipient Email Address

Submitting the Recipient Bulk Upload Template:

Upload the completed Recipient Bulk Upload File by navigating to the Bulk Registration tab in the CVMS PROVIDER PORTAL.

View uploaded recipient records for completeness and accuracy. If you find errors or missing information, click cancel to remove the file and edit.

If the data is correct, click Create Records.

STEP 8: Navigate the CVMS RECIPIENT PORTAL

Invited Recipients will receive an automated email to register for the CVMS RECIPIENT PORTAL.

In the CVMS RECIPIENT PORTAL, Recipients are able to enter basic information, complete a health questionnaire, view their vaccination status and record. They will be assigned to a priority tier group and eligibility status.

Recipients are encouraged to fill out the questionnaire before their appointment and call their provider to make an appointment.

Receiving an Inbound Vaccine Transfer

If you are receiving an inbound transfer from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound transfer, you will be able to process the inventory via the inbound transfer page.

Updating Vaccine Records

You will ONLY be able to update the vaccine inventory name on the vaccine inventory record. It will be very important to ensure accurate data entry when processing a new COVID-19 Vaccine inventory shipment.

If you need to make additional corrections to the Vaccine Inventory record, you will need to contact the CVMS HELPDESK PORTAL.

Redistribution

The planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

Transfer

The unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

Generating Reports

There are three separate reports currently available for Healthcare Location Managers:

1. [HCP Healthcare Roles Report](#) - identify all users and associated roles at the location of the logged-in user
2. [Inventory Summary Report](#) - view your location(s) COVID-19 vaccine inventories
3. [Recipient Vaccination Report](#) - view all recipient vaccination details of your location

LINKS: [Receiving and Processing Vaccine Shipments User Guide](#)

[Inventory Wastage, Return and Redistribution/ Transfer User Guide](#)

[NC COVID-19 Vaccine Redistribution or Transfer Request Form](#)

[Updating Total inventory Dose Quantities Job Aid](#)

[CVMS PROVIDER PORTAL Reports User Guide](#)

Once upload is complete, you will receive an alert message stating the number of successful employee/recipient uploads and the number of failed.

Once you click OK, the successful uploads will receive an automatic email notification with instructions on how to complete their account setup and register in the CVMS RECIPIENT PORTAL.

If any employees or individual Recipients included in your upload failed, you will automatically receive an email with the attachment that contains the failed records and the reason for failure.

Correct the errors in the same file based on the failure reason and re-upload the file in the Bulk Registration tab.

LINKS: [Recipient Bulk Upload User Guide](#)

[Recipient Bulk Upload Template](#)

The CVMS RECIPIENT PORTAL registration link is only active for 48-hours upon receipt.

If you fail to register during this window, you can register in-person during your appointment. Otherwise, Recipients will have to navigate to the portal log-in page and click on forgot your password to generate a new password.

LINKS: [CVMS RECIPIENT PORTAL](#)

[Recipient Portal User Guide](#)