North Carolina COVID-19 Vaccine Management System (CVMS)

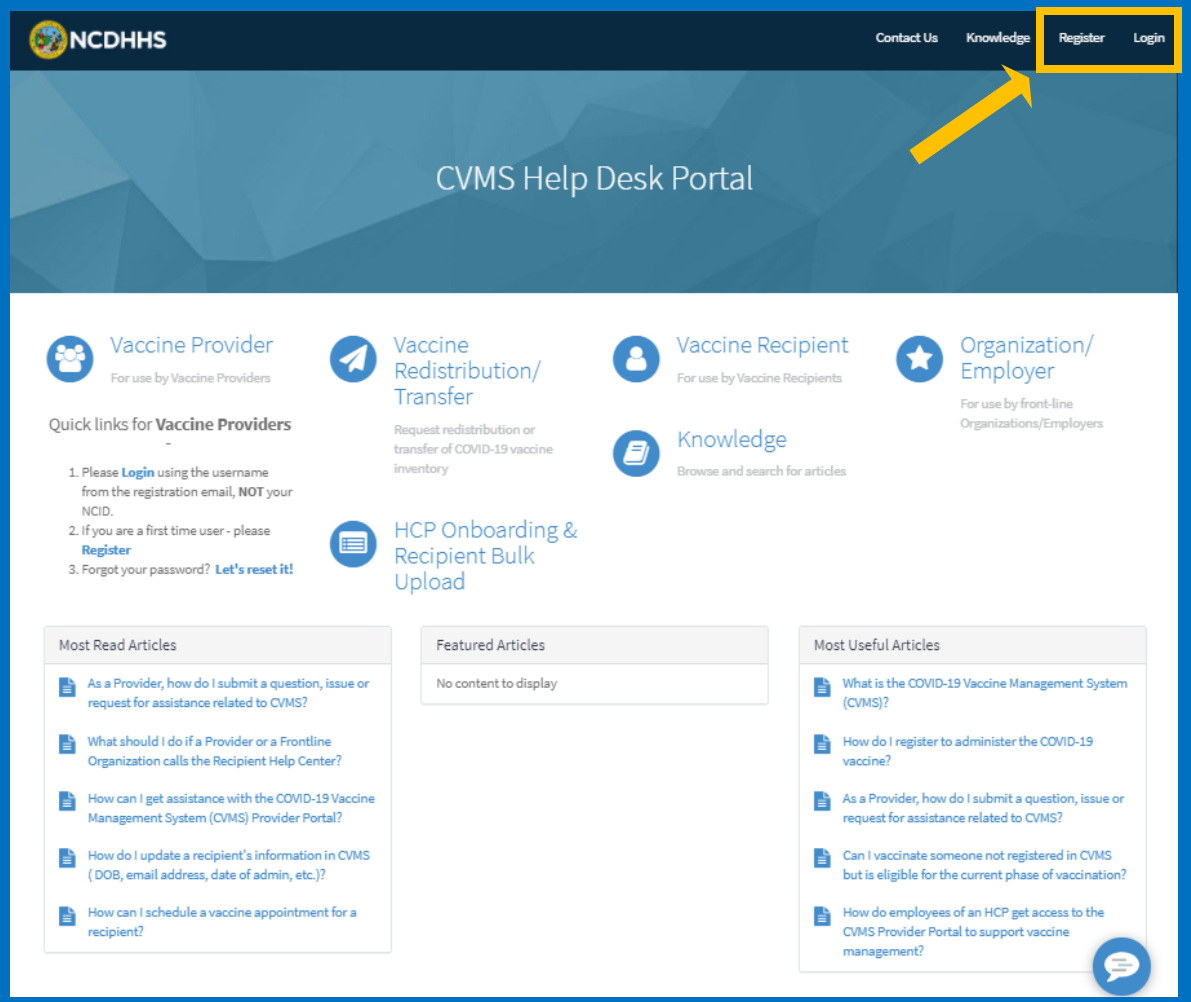
Provider Portal

Inventory Marketplace, Deprecation, Transfer, and Redistribution User Guide

Version 13

June 11, 2021

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES



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

You can also call the COVID-19 Vaccine Provider Help Center at **(877) 873-6247** and select option 1.

The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday to Friday: 7 am – 7 pm ET
Saturday & Sunday: 10 am – 6 pm ET

* On the home page of the CVMS Help Desk Portal, select Login at the top right-hand corner, then 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, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

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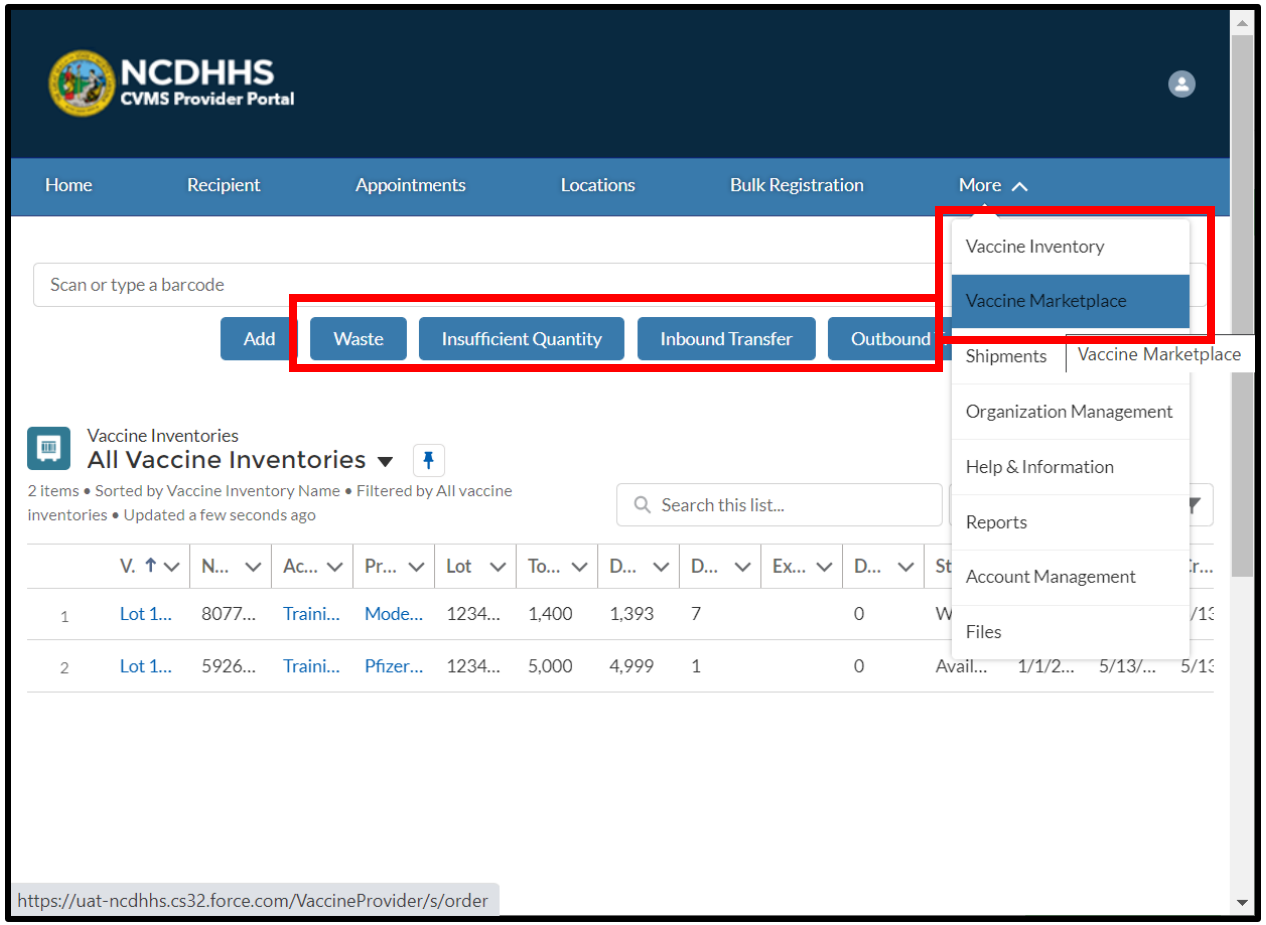
Overview

Overview



To provide NCDHHS with an accurate picture of the COVID-19 vaccine inventory available across all provider locations, you will need to update the CVMS Provider Portal with COVID-19 vaccine inventory reductions, deprecations or transfers to other providers or other locations.

If you have a surplus of COVID-19 vaccine doses or if you need additional COVID-19 vaccine doses, use the **VACCINE MARKETPLACE** to directly coordinate with another provider and agree to transfer COVID-19 vaccine doses.

The processes discussed in this training guide are primarily for users with a **Healthcare Location Manager** profile.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers. Internet Explorer or older versions of Edge (non-Chromium) browsers are not supported
- Log into the CVMS Provider Portal at https://covid-vaccine-provider-portal.ncdhhs.gov using your NCID username and password.

Now, let's get started!

Search the Vaccine Marketplace

The "Vaccine Marketplace" enables providers to self-identify and match COVID-19 vaccine needs with other providers

This feature supports the transfer of COVID-19 vaccine from **provider to provider**.

SUPPLY

Providers with extra COVID-19 vaccine doses can:

- Search the Vaccine Marketplace for a nearby provider in need of extra COVID-19 vaccine doses
- If provider is identified, contact is made via phone or email
- If provider is not located, marketplace post of extra dose availability is created

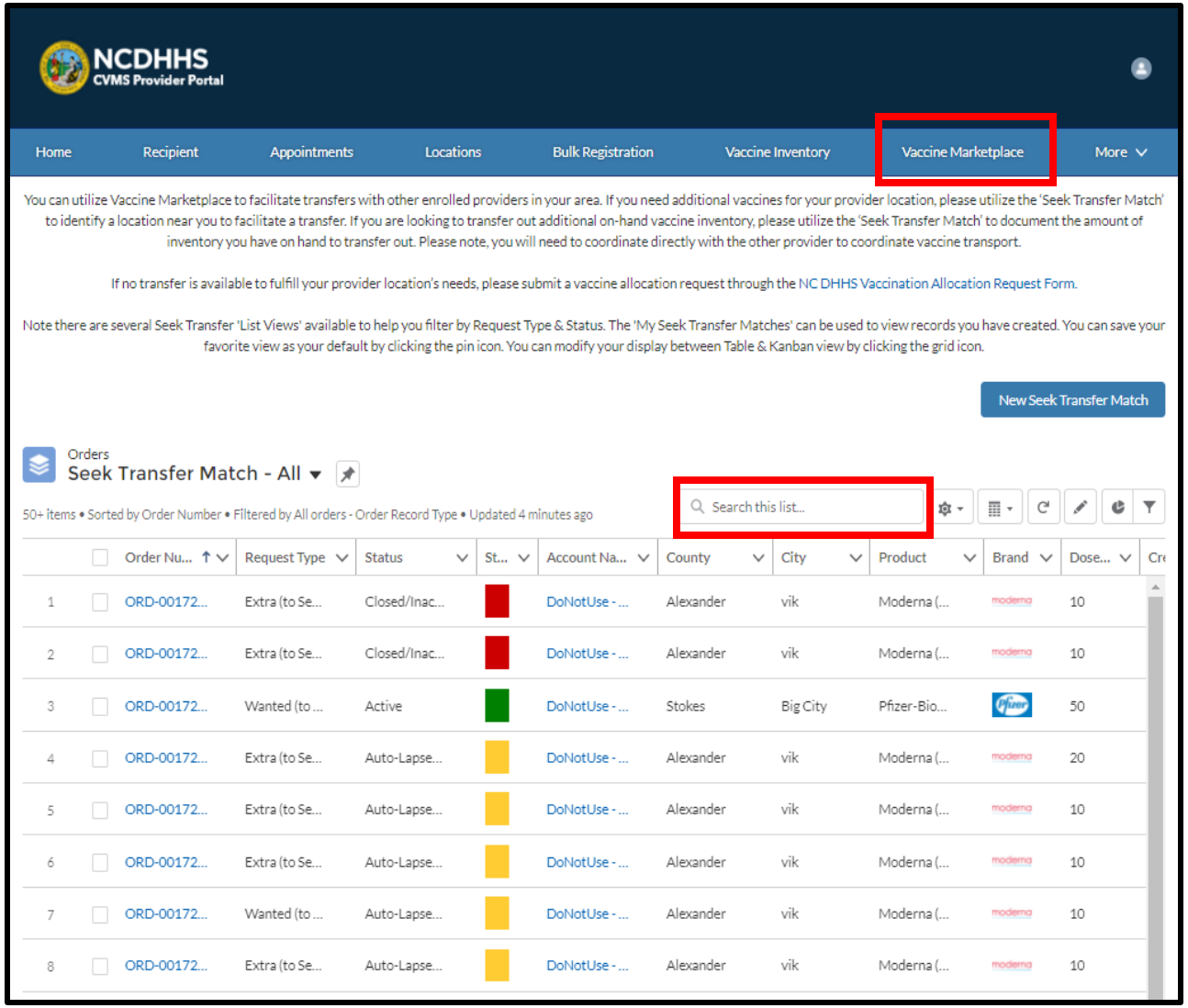
DEMAND

Providers seeking extra COVID-19 vaccine doses can:

- Search the Vaccine Marketplace for a nearby provider offering extra COVID-19 vaccine doses
- If provider is identified, contact is made via phone or email
- If provider is not located, marketplace post with quantity and vaccine brand needed is created

Once providers reach an agreement on moving COVID-19 vaccine doses, the existing transfer process in the CVMS Provider Portal is followed to complete the transaction

Search and Post Request in the Vaccine Marketplace



All Users with a Healthcare Location Manager Profile have access to the Vaccine Marketplace via **the Vaccine Marketplace tab.**

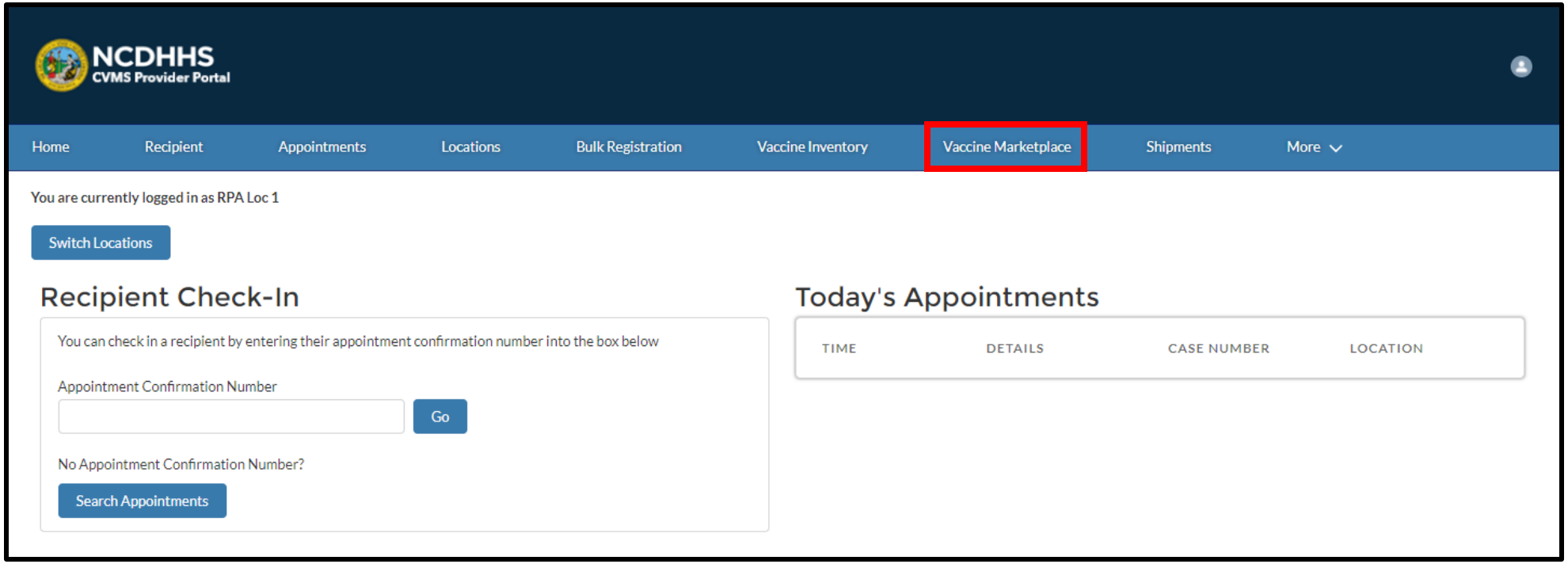
You can **search** other providers in your area with extra inventory ready to transfer out *OR* providers near you seeking inventory by vaccine product.

Offer your Vaccine Surplus

Step 1 of 9: Navigate to the Vaccine Marketplace

If you have a surplus of COVID-19 vaccine doses, first check if other providers in your area are looking for COVID-19 vaccine doses. If you don't find any, you can post a request on your own.

1. At the top of your home page, click on the **VACCINE MARKETPLACE**



Audience

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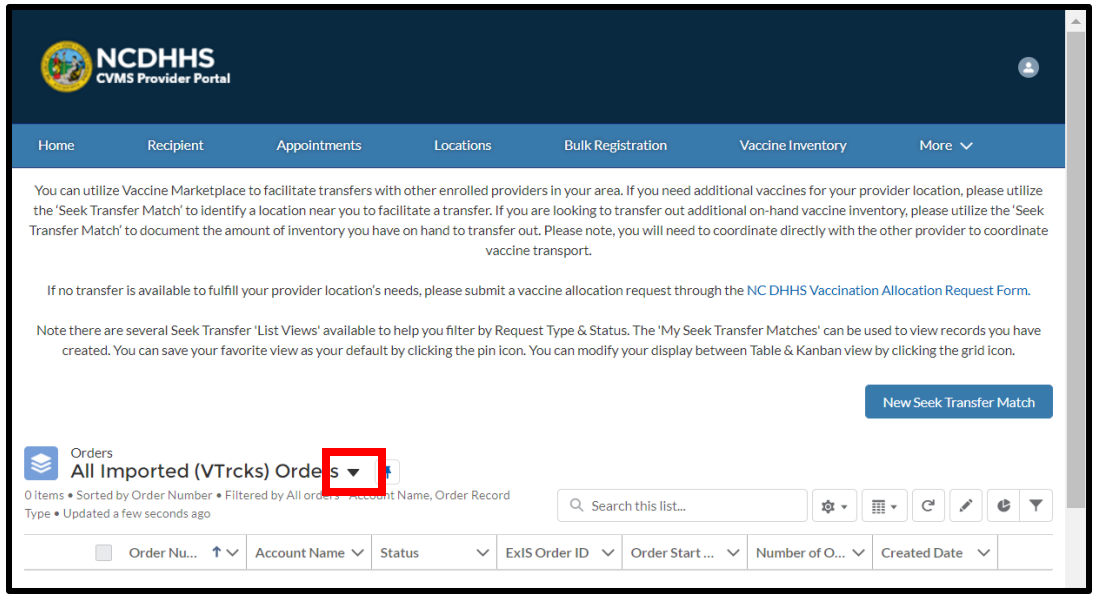
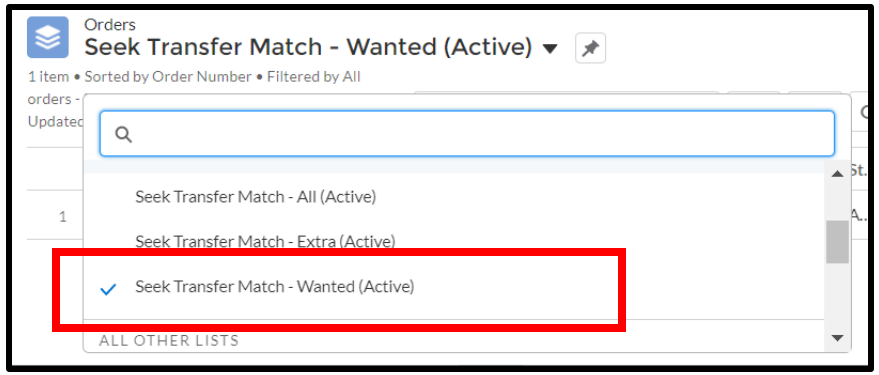
Step 2 of 9: View All Available And Active Requests

1. Locate **ORDERS** and click on the drop-down menu to change the view



2. Select **SEEK TRANSFER MATCH – WANTED (Active)**



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Tips

To always see the available and active requests, set the view to **SEEK TRANSFER MATCH – ALL**, and use the pin icon to set this as your default view.

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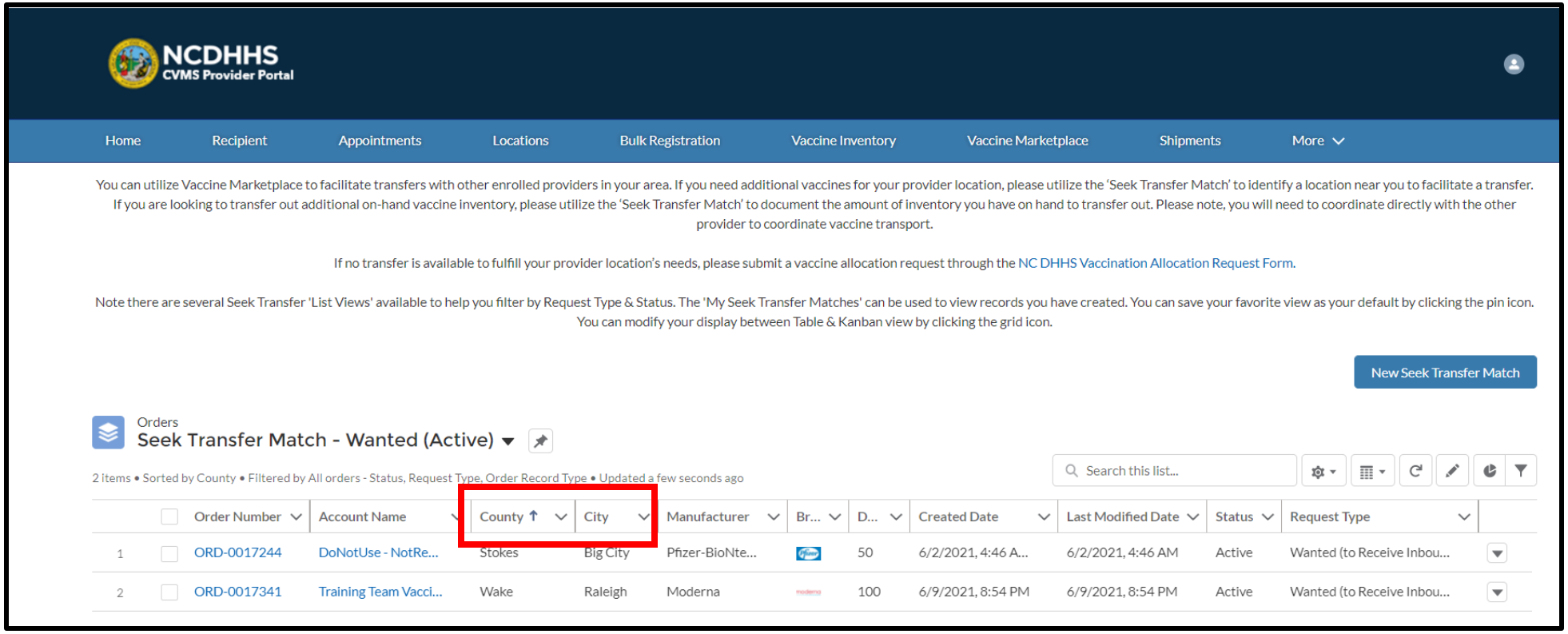
Step 3 of 9: Sort Inventories by Location

To find a provider near your location, sort the inventories by location.

1. Click on the Header Row fields **CITY** or **COUNTY** to sort the records in ascending or descending order by location



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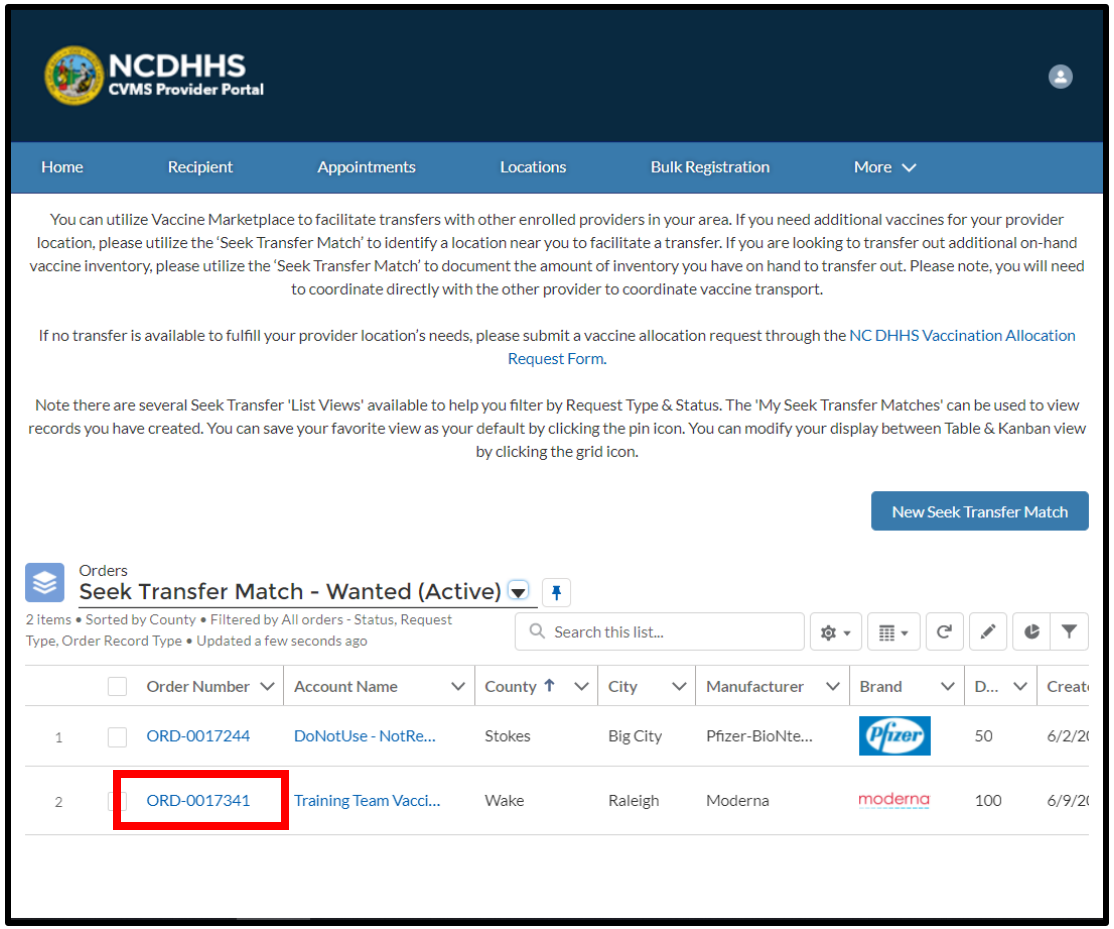
Step 4 of 9: Select the Request that Match Your Offer



After sorting your results, navigate the list to find the inventory that appears to best suit your Offer.

1. Click on the **ORDER NUMBER** associated with the request

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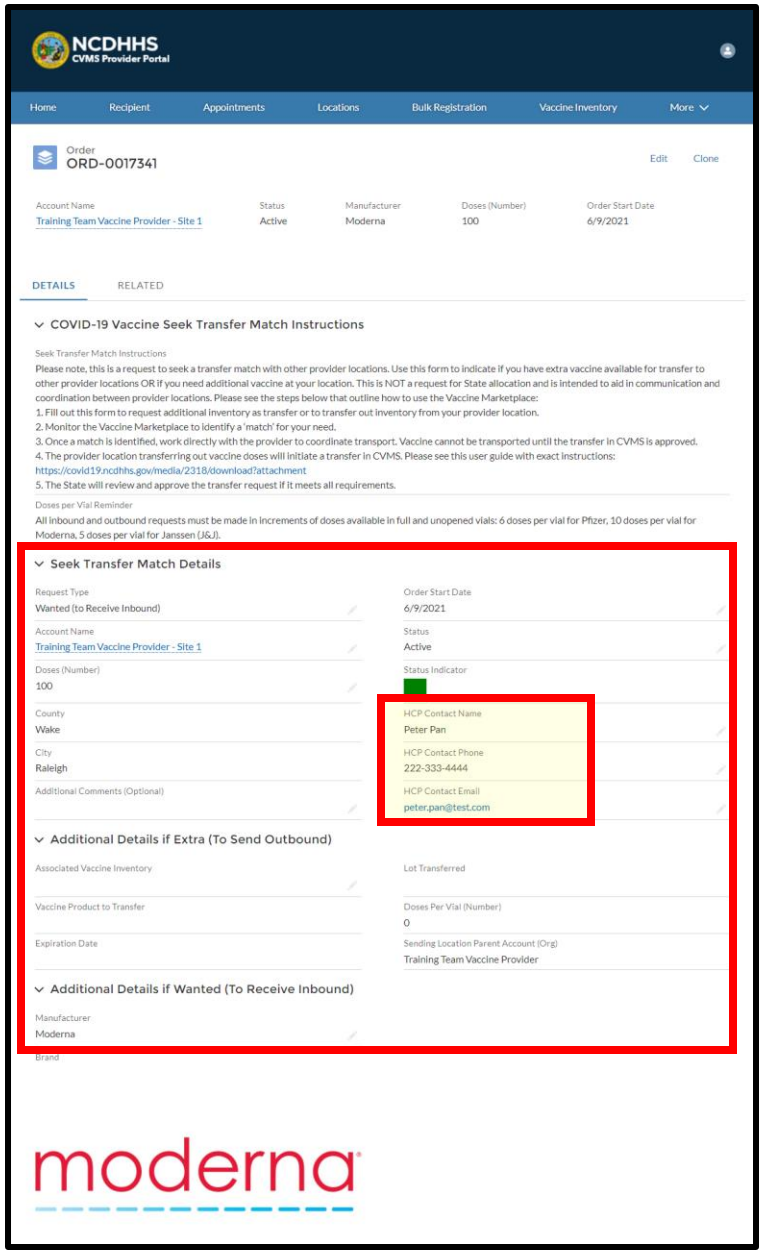
Step 5 of 9: Review the Inventory Details

Review the inventory details, and contact the other provider directly using the **HCP CONTACT PHONE** and **HCP CONTACT EMAIL.**

If an agreement is reached to transfer COVID-19 vaccine doses, you can **initiate an Outbound Transfer** (Click here to read the instructions on the Outbound Transfer Process located in this user guide).

Please also check the NCDHHS guidance for transport of COVID-19 vaccine at https://covid19.ncdhhs.gov/media/3070/download?attachment



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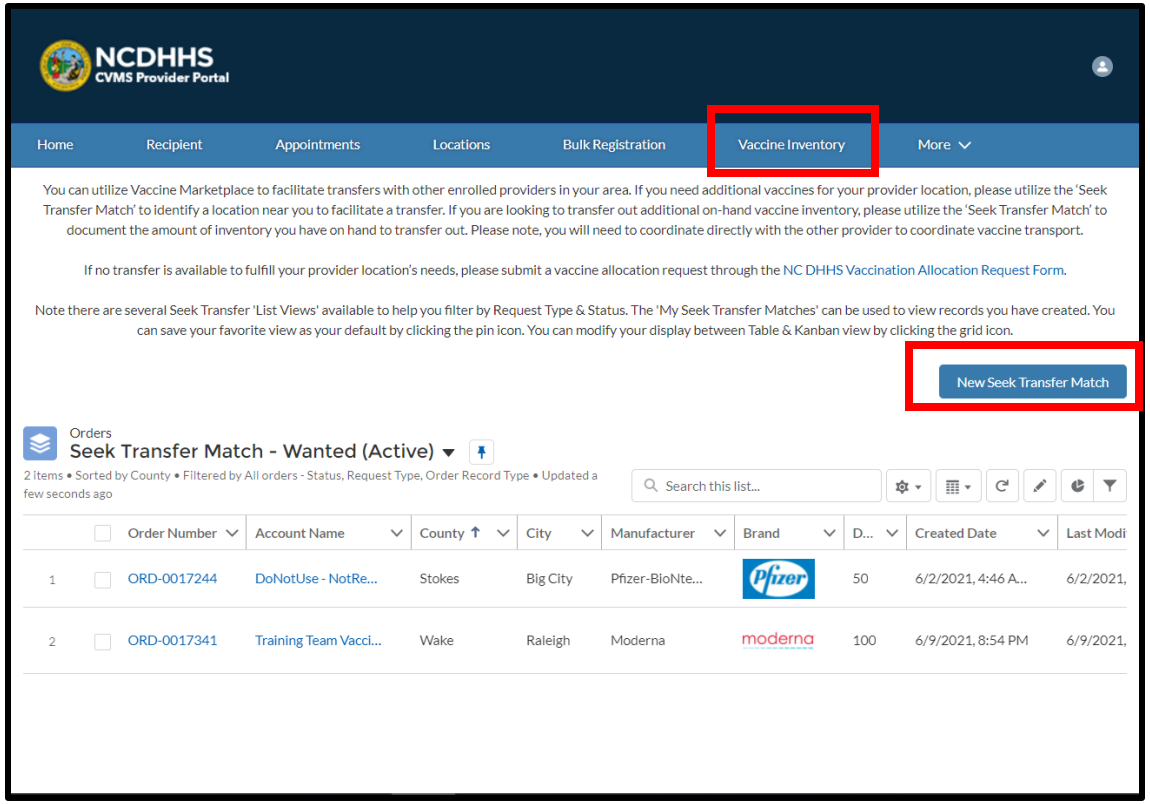
Step 6 of 9: Initiate and New Seek Transfer Match



If no provider is looking for the type of COVID-19 vaccine product you are offering, post an extra dose availability in the Vaccine Marketplace to let other providers know that you can support them.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Click on **NEW SEEK TRANSFER MATCH**

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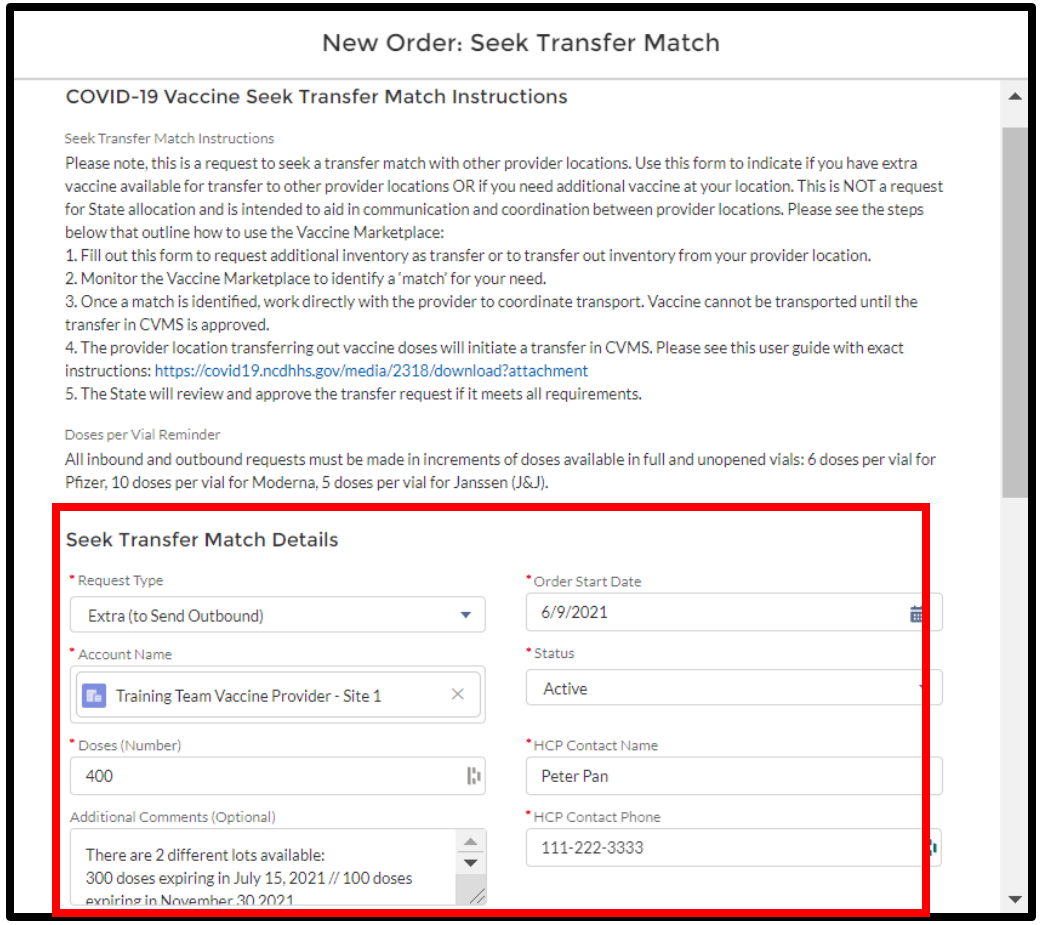
Step 7 of 9: Start completing the "Seek Transfer Match" Form



1. Read the instructions at the top of window
2. Complete the required fields:
   - **Request Type:** select "Extra (to Send Outbound)"
   - **Order Start Date:** enter today's date
   - **Account Name:** select your location account name
   - **Status:** select **ACTIVE**
   - **Doses:** enter the number of doses you are offering
   - **HCP Contact Name/phone/email:** who to contact to agree on the transfer
   - **Additional Comments**: be as detailed as possible. For example, "These Extra doses of 400 doses are split over six separate inventories. Here are the number of doses per lot and expiration date: xxx – xx/xxxx"

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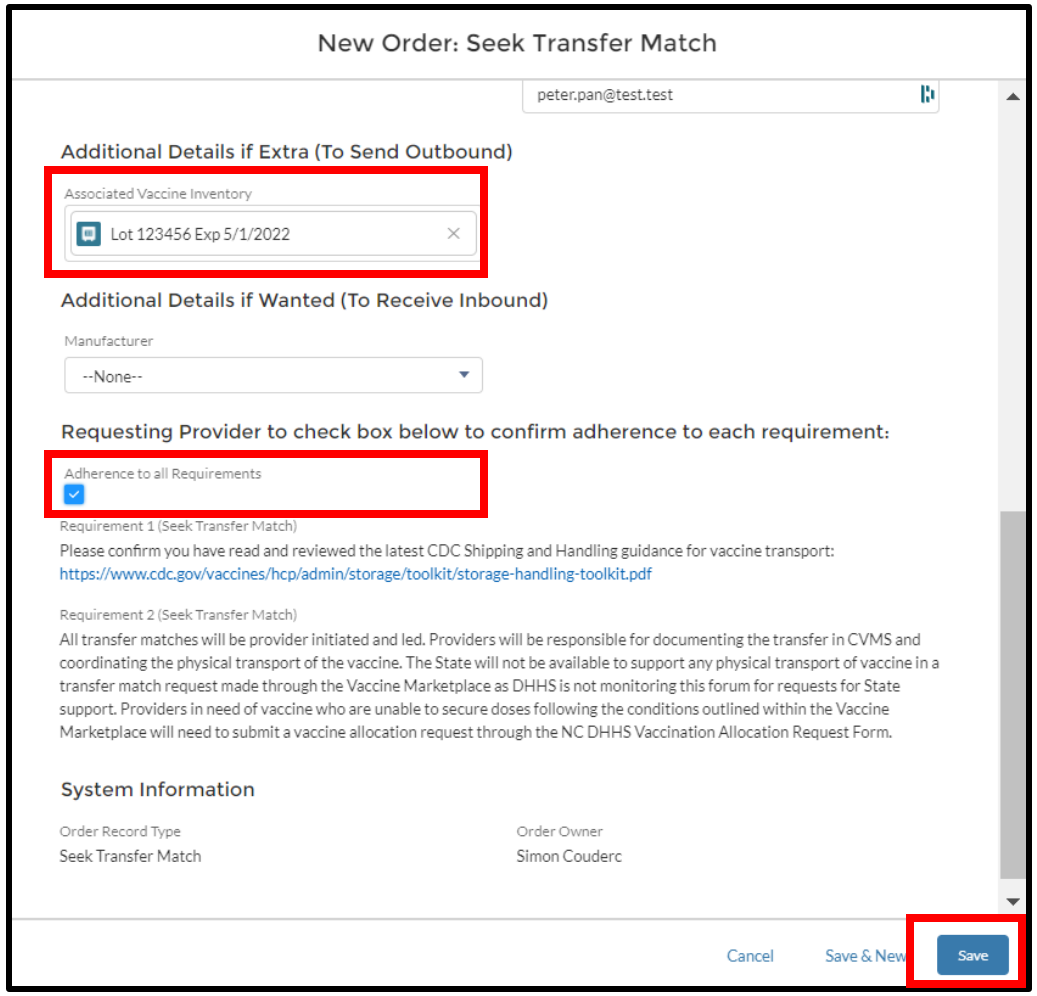
Step 8 of 9: Submit the "Seek Transfer Match" Form



1. Scroll down and complete the bottom of the form:
   - **Associated Vaccine Inventory:** select the lot number you are offering. See previous slide if you wish to submit multiple inventories of the same brand
   - **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them
2. Click **SAVE**

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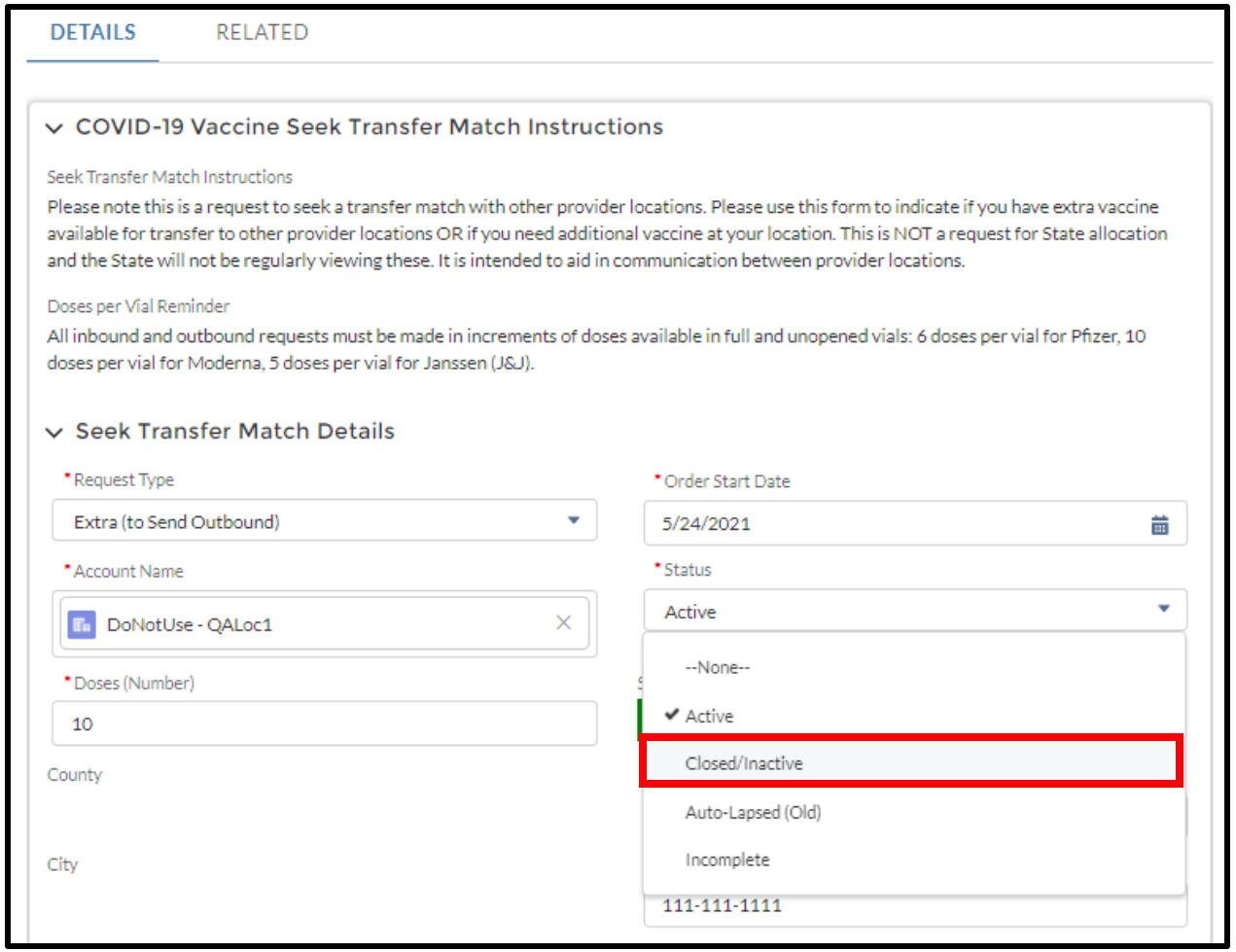
Healthcare Location Manager

Tips

Your form will automatically be cancelled after 7 days. To extend it prior the cancellation, simply edit the date on the record which will reset the clock. If there are no changes to the post within one week, the Healthcare Location Manager will receive an e-mail letting them know that the ad has auto-lapsed with instructions on how to clone the ad to repost is desired. The auto-lapse email will go to the email address associated to your NCID, not the email you enter in the form.

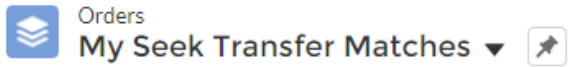
Step 9 of 9: Close Your Order



If a local provider contacts you and you are in agreement with the conditions of transfer, you can **initiate an Outbound Transfer (Click here for instructions on the Transfer).**

When the transfer has been agreed on, close your Order in the Vaccine Marketplace:

1. Navigate to the **Vaccine Marketplace** tab
2. Filter the view on

3. Open the form
4. Click on **EDIT** at the top right
5. Change the Status to **CLOSED/INACTIVE**

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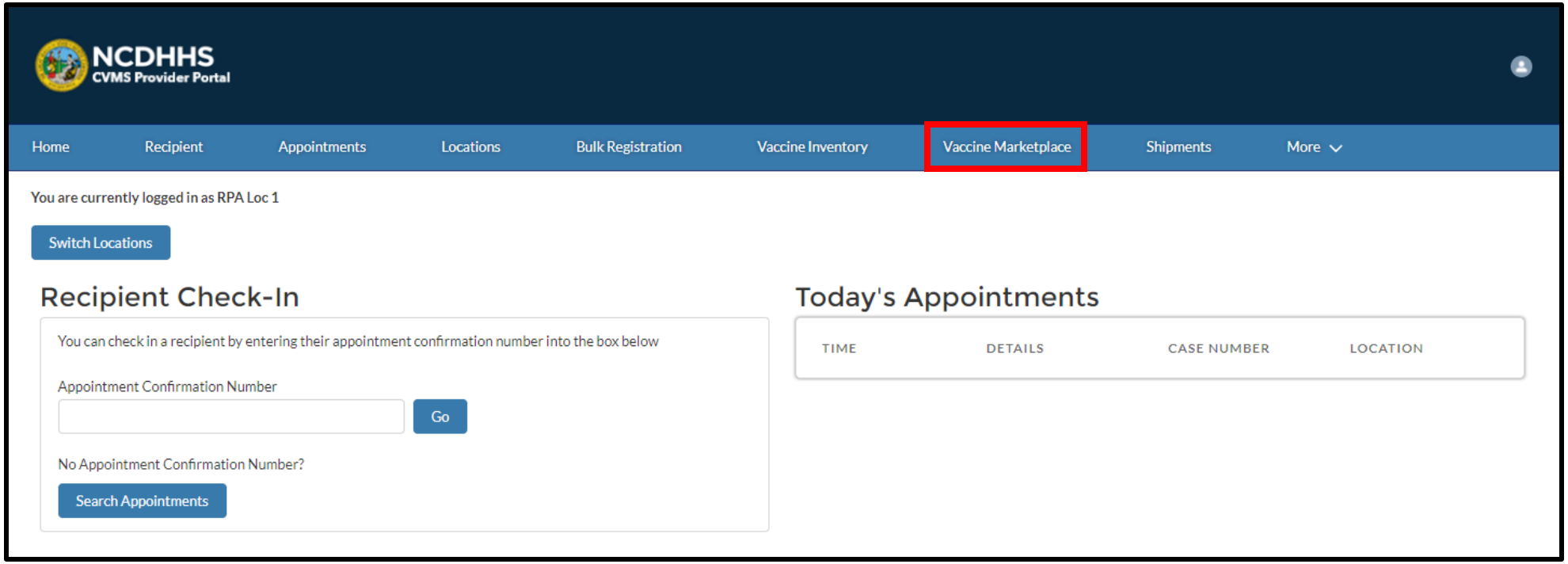
Request Additional Vaccines

Step 1 of 9: Navigate to the Vaccine Marketplace

If you need additional COVID-19 vaccine doses, first check if other providers in your area are offering extra doses in the Vaccine Marketplace. If you don't find any, you can post a request on your own.

1. At the top of your home page, click on the **VACCINE MARKETPLACE**



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Step 2 of 9: View All Available And Active Offers

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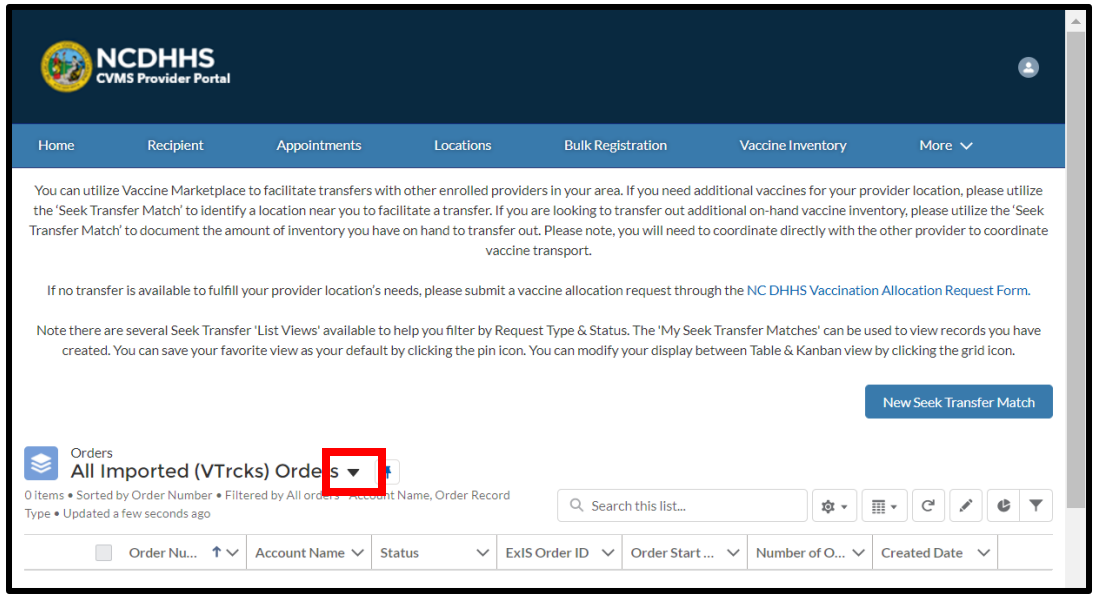
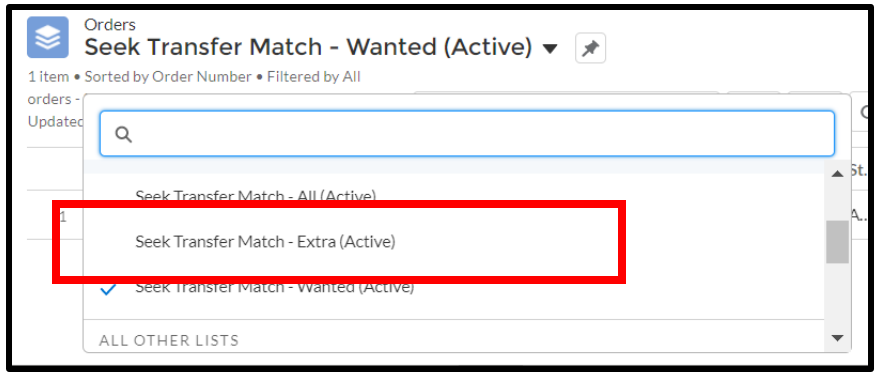


2. Select **SEEK TRANSFER MATCH – EXTRA (Active)**



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Step 3 of 9: Sort Inventories by Location

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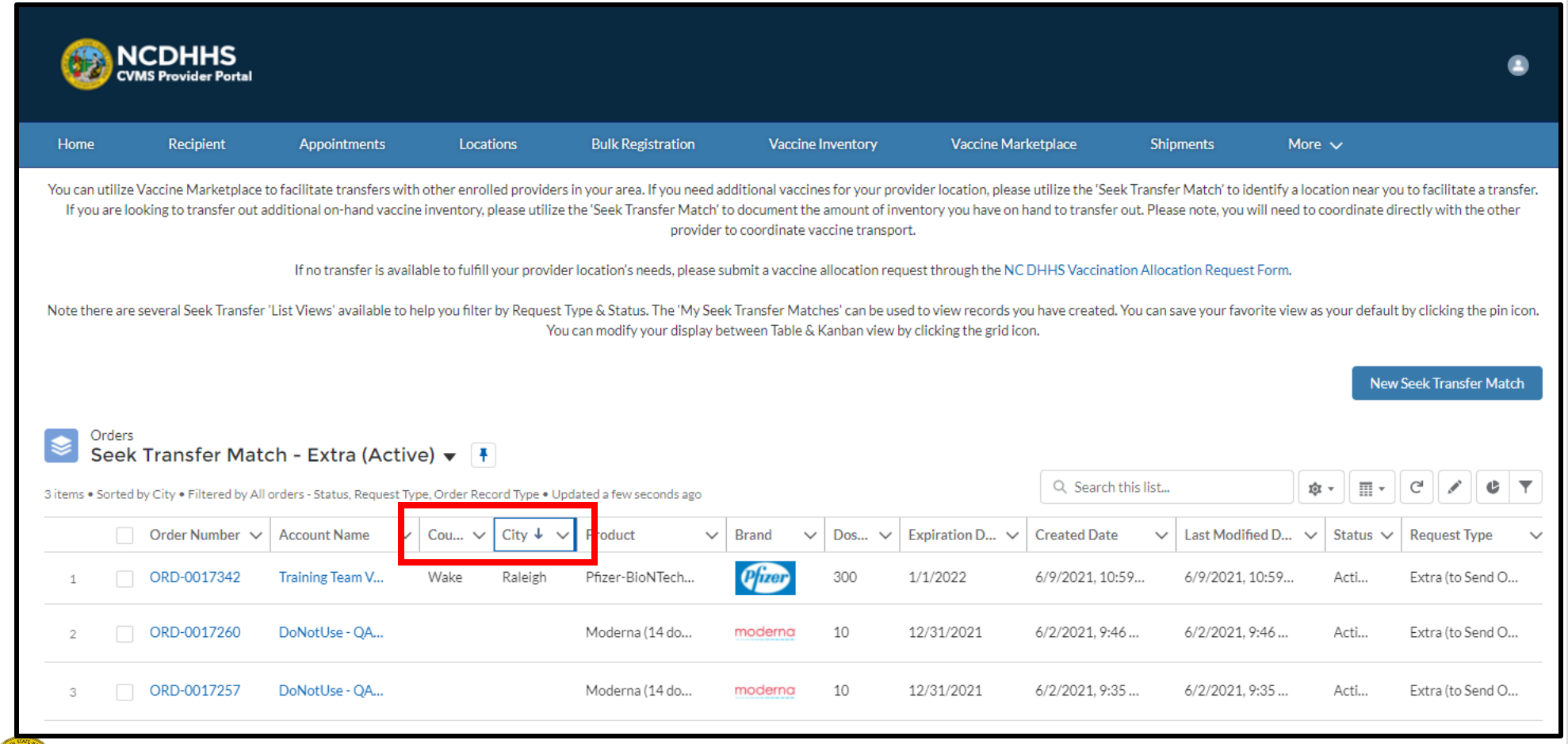

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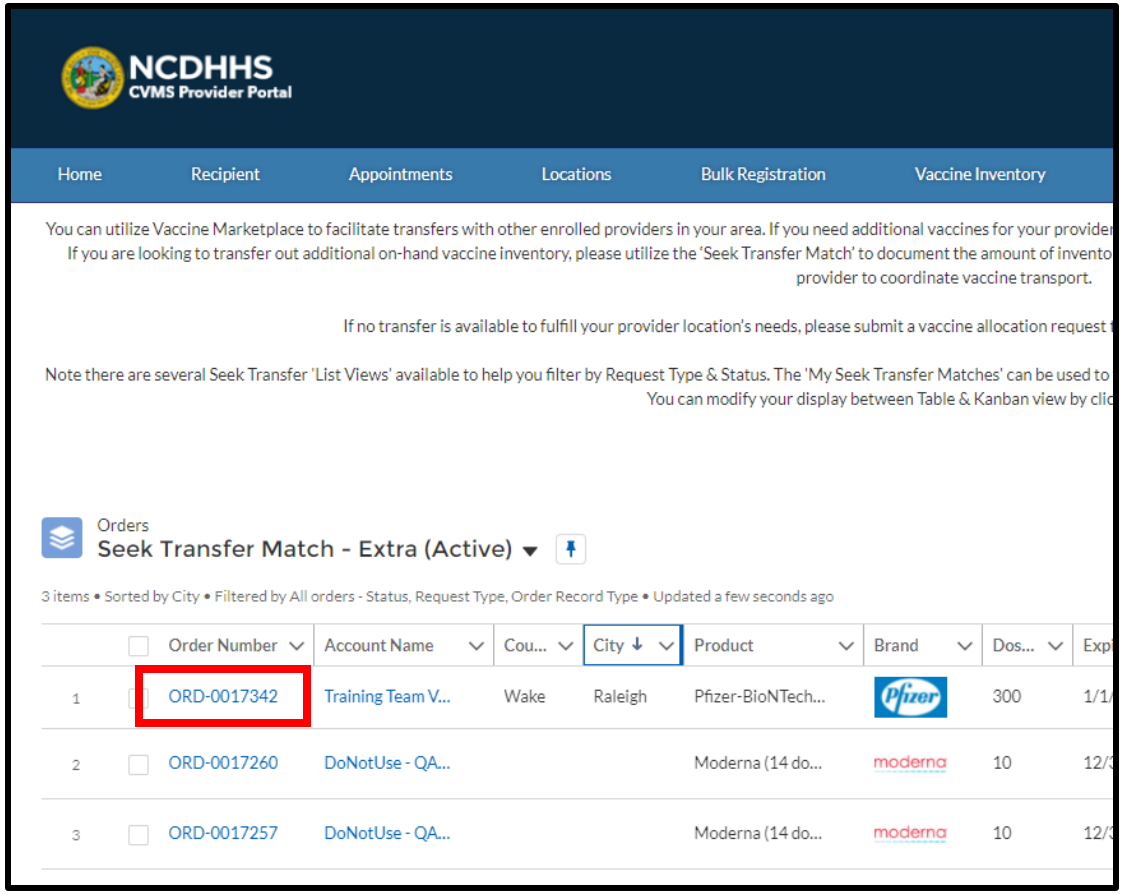
Step 4 of 9: Select the Request that Match Your Offer



After sorting your results, navigate the list to find the inventory that appears to best suit your need.

1. Click on the **ORDER NUMBER** associated with the request

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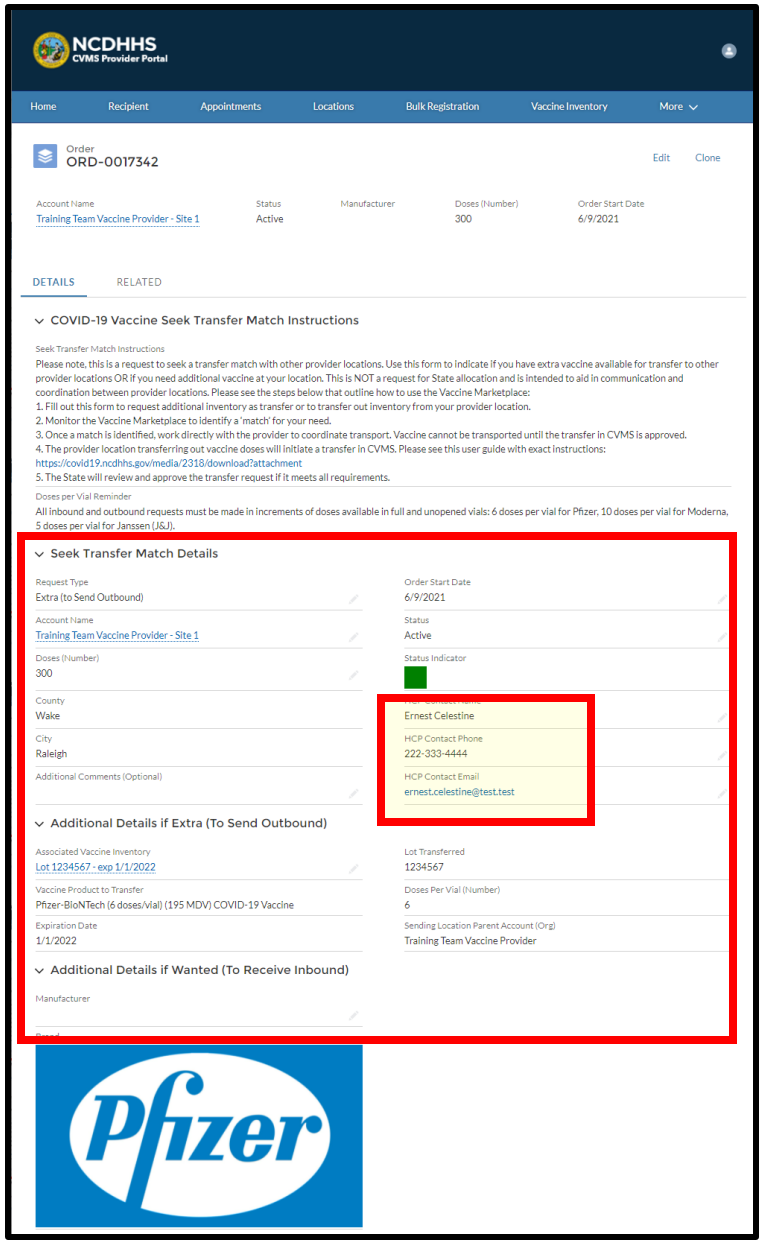
Step 5 of 9: Review the Inventory Details

Review the inventory details, and contact the other provider directly using the **HCP CONTACT PHONE** and **HCP CONTACT EMAIL.**

If you both agree on the conditions of transfer, the sending provider will create a transfer in the CVMS Provider Portal.

You can check the NCDHHS guidance for transport of COVID-19 vaccine at https://covid19.ncdhhs.gov/media/3070/download?attachment

Once the transferred inventory is delivered, add the inventory in the CVMS Provider Portal by **receiving an Inbound Transfer** (Click here to read the instructions on the Inbound Transfer Process located in this user guide).



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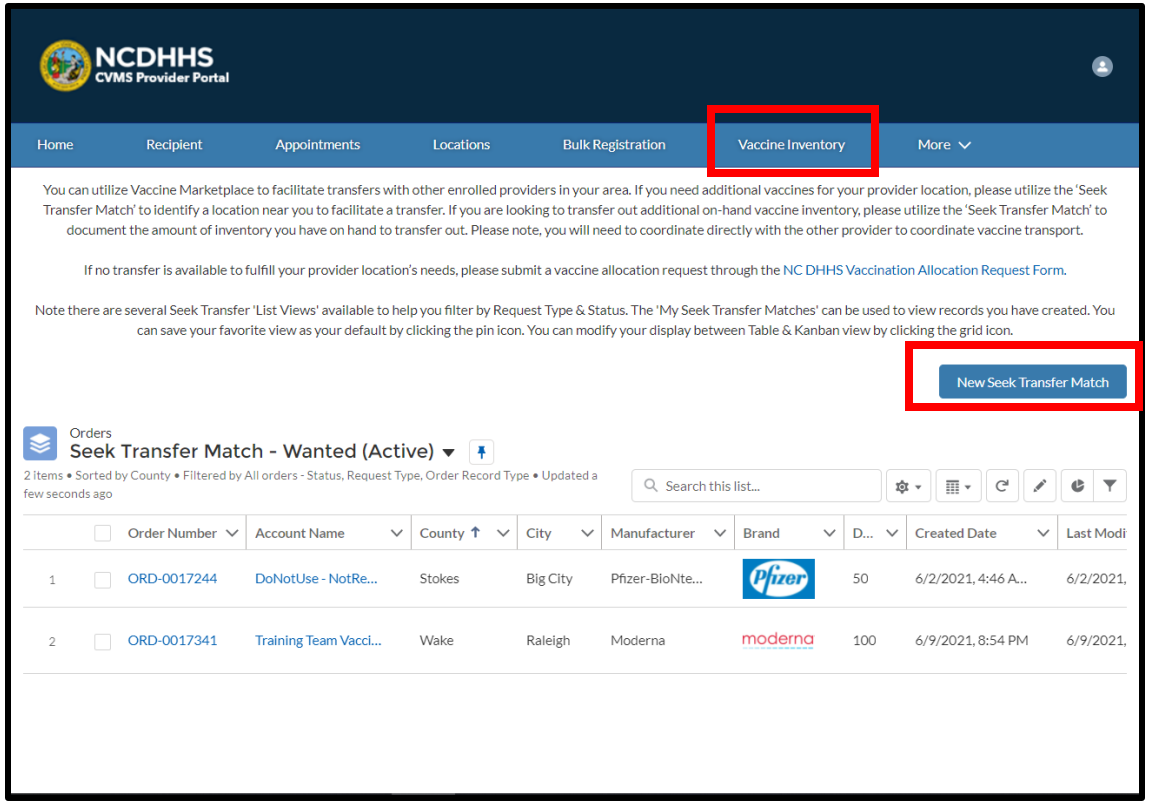
Step 6 of 9: Initiate and New Seek Transfer Match



If no provider is offering the type of COVID-19 vaccine product you are seeking, post a **WANTED** request in the Vaccine Marketplace to let other providers know that you can are seeking additional COVID-19 vaccine doses.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Click on **NEW SEEK TRANSFER MATCH**

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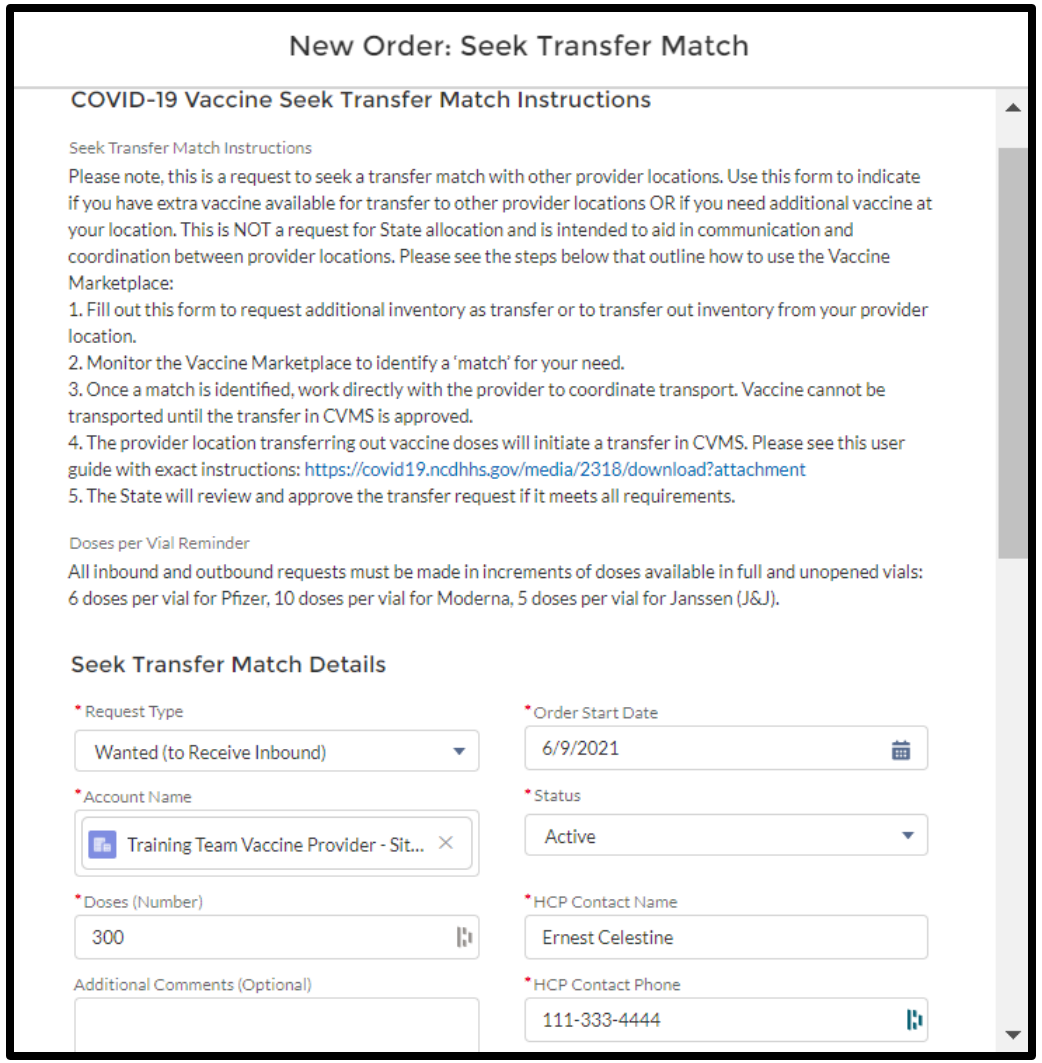
Step 7 of 9: Start completing the "Seek Transfer Match" Form



1. Read the instructions at the top of window
2. Complete the required fields:
   - **Request Type:** select "Wanted (to Receive Inbound)"
   - **Order Start Date:** enter today's date
   - **Account Name:** select your location account name
   - **Status:** select **ACTIVE**
   - **Doses:** enter the number of doses you are looking for
   - **HCP Contact Name/phone/email:** who to contact to agree on the transfer
   - **Additional Comments**: enter any information that could be useful like the address of shipment, and opening hours to receive the shipment

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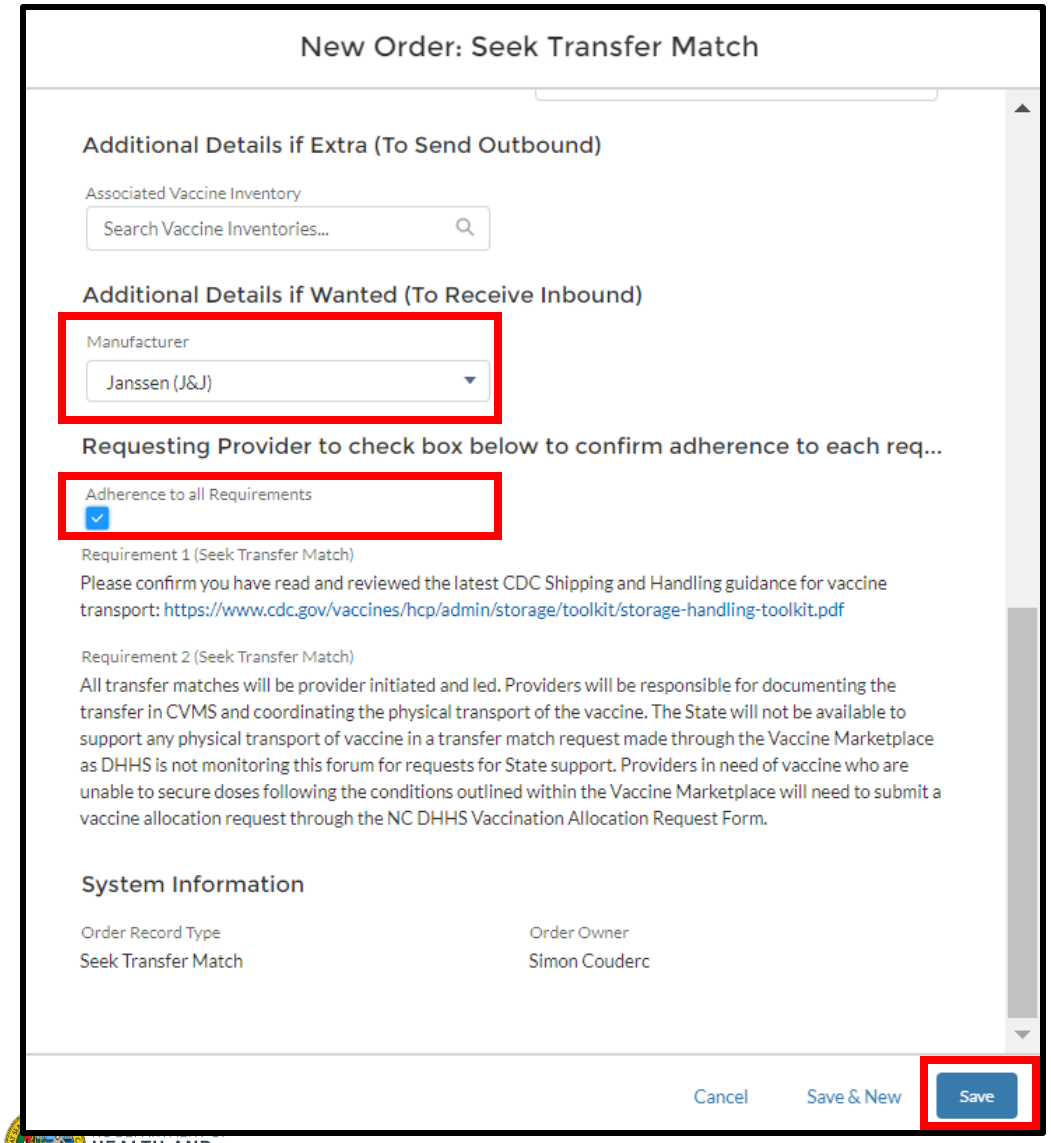
Step 8 of 9: Submit the "Seek Transfer Match" Form



1. Scroll down and complete the bottom of the form:
   - **Manufacturer:** select the COVID-19 vaccine brand you are seeking, or select **ANY** if any brand is acceptable
   - **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them
2. Click **SAVE**

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Tips

Your form will automatically be cancelled after 7 days. To extend it prior the cancellation, simply edit the date on the record which will reset the clock. If there are no changes to the post within one week, the Healthcare Location Manager will receive an e-mail letting them know that the ad has auto-lapsed with instructions on how to clone the ad to repost is desired. The auto-lapse email will go to the email address associated to your NCID, not the email you enter in the form.

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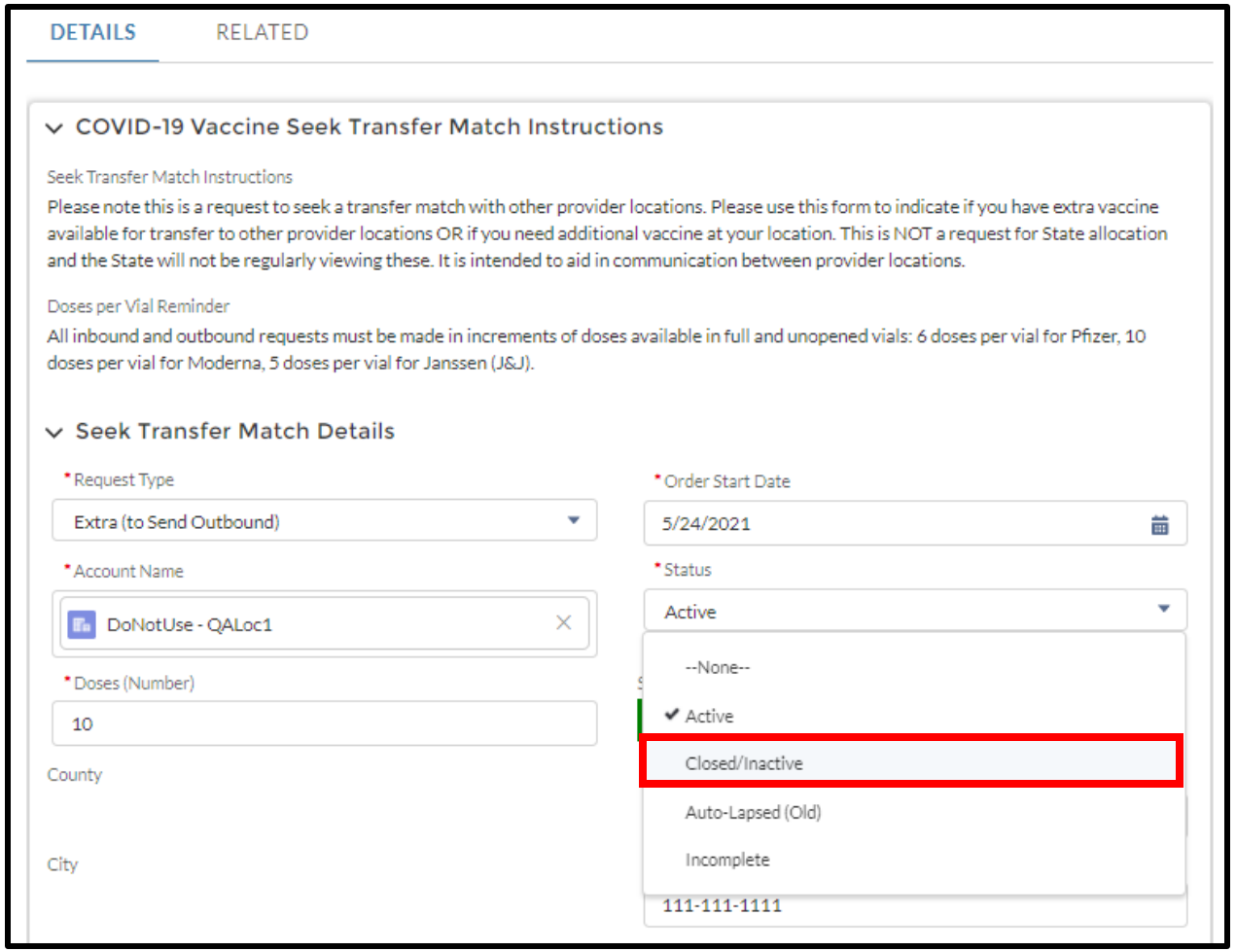
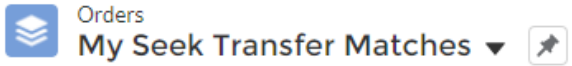
Step 9 of 9: Close Your Order



If you reach agreement with a provider on the conditions of transfer, the sending provider will enter a transfer in the CVMS Provider Portal. Once the inventory is delivered, you can **receive the Inbound Transfer to add the inventory to your location (Click here for instructions on the Transfer).**

When the transfer has been agreed on, close your post in the Marketplace:

1. Navigate to the **Vaccine Marketplace** tab
2. Filter the view on

3. Open the form
4. Click on **EDIT** at the top right
5. Change the Status to **CLOSED/INACTIVE**

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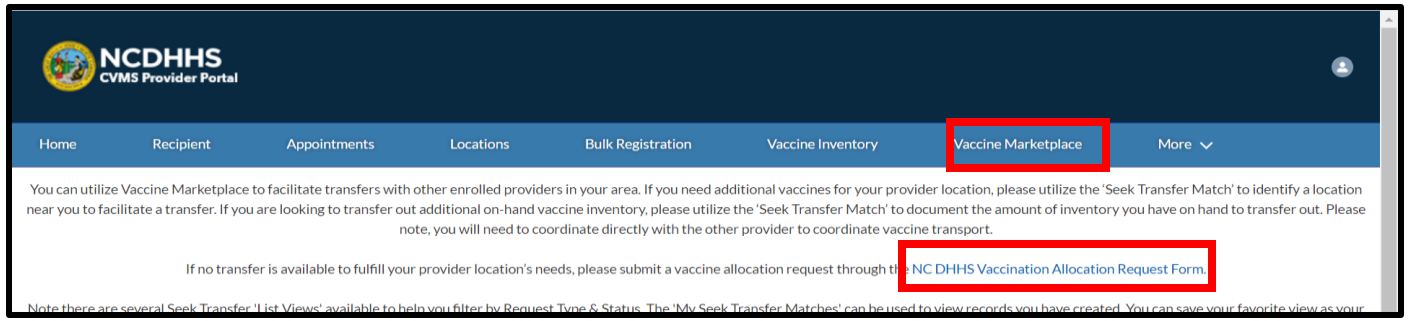
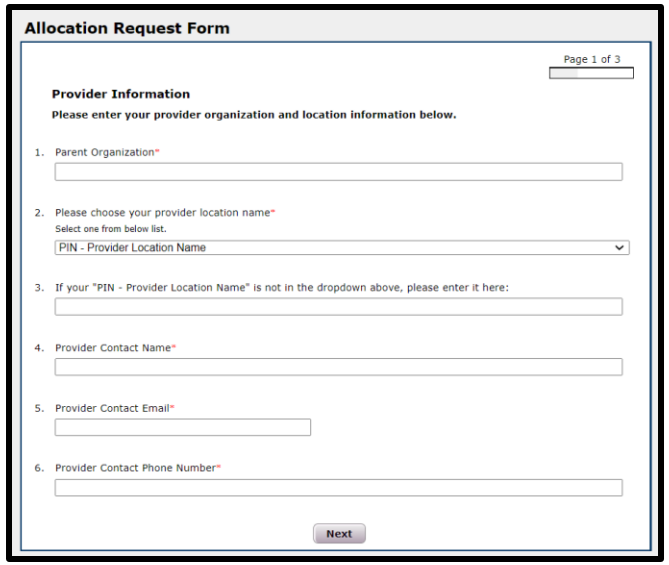
Request a New Shipment to the NCDHHS Team

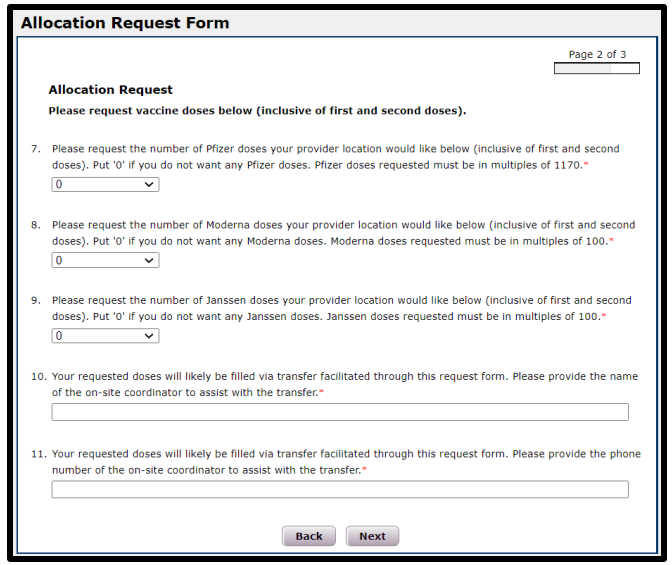
If there is no inventory available nearby, you can submit a request to the State via the NC DHHS Vaccine Allocation Form: https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyID=98MI76m3#. A link to the form was added to the **VACCINE MARKETPLACE** tab.

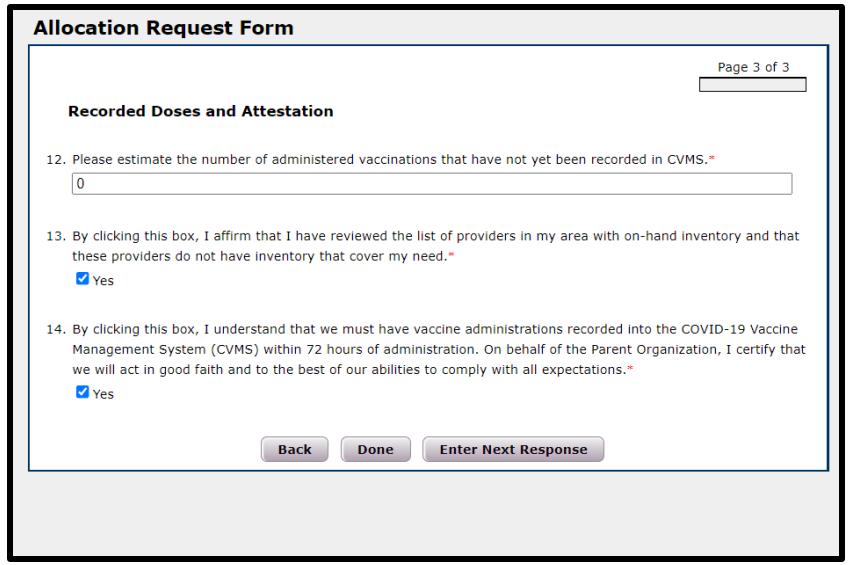
1. Navigate to **VACCINE MARKETPLACE**
2. Click the **NC DHHS VACCINATION ALLOCATION REQUEST FORM** link



3. Fill out the form and submit it







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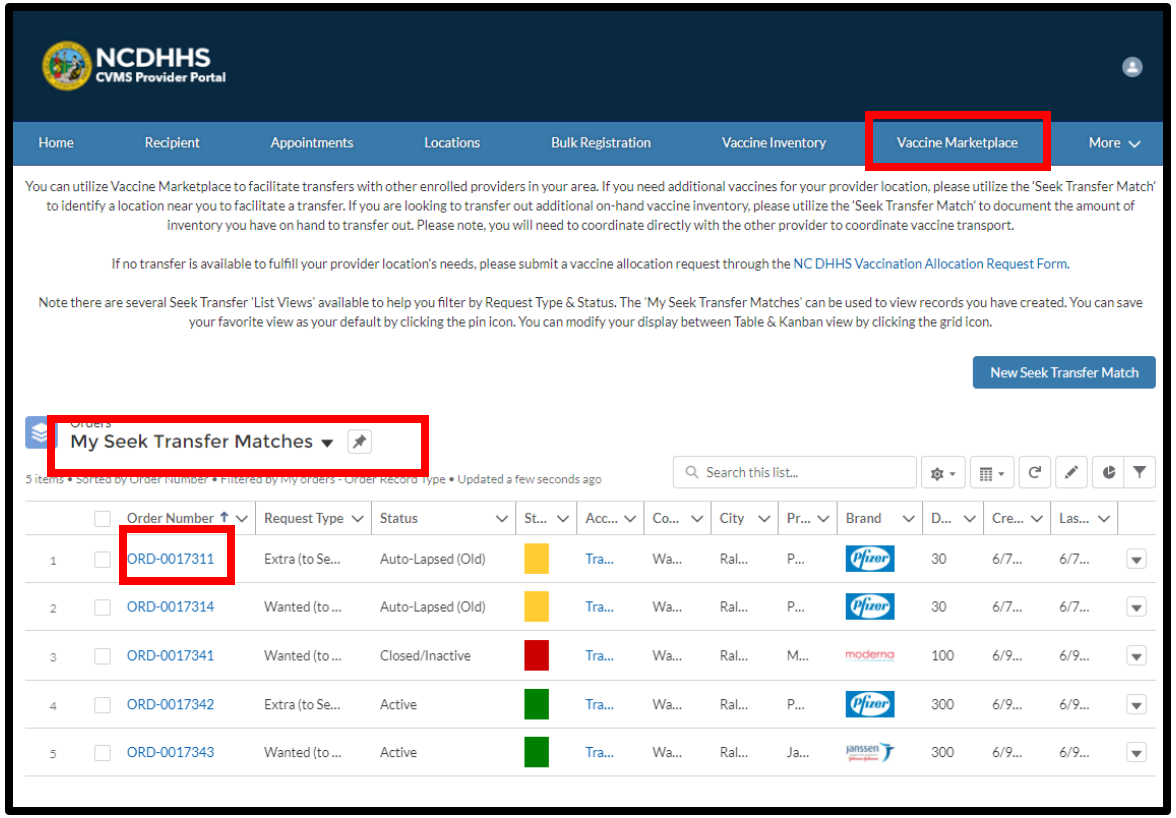
Maintain Your Requests Posted in the Vaccine Marketplace

Step 1 of 3: Renew Your Extra or Wanted Forms



After 7 days, your post in the Vaccine Marketplace will expire. You can renew your post prior the seven days, or after seven days by cloning your form and posting a new one.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Change the view to **MY SEEK TRANSFER MATCHES**
3. Open the request you wish to extend or to clone

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Tips

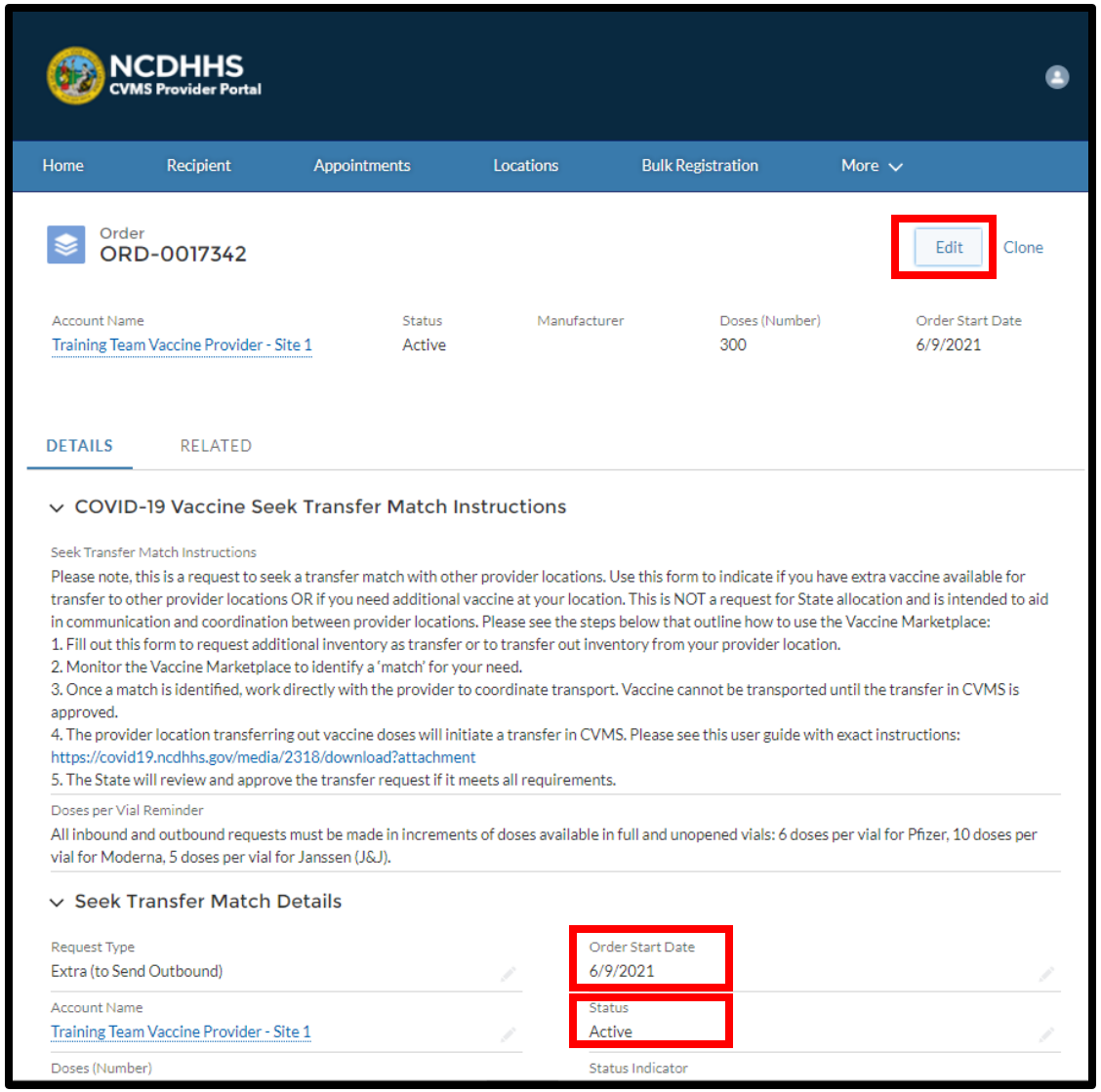
The Status color code is:

Yellow for Auto-lapse (Old) requests. These requests can only be cloned, and the Status cannot be modified.

Green for Active requests for which you can still extend the duration.

Red for Closed/Inactive requests that can be cloned as well to start a new form with the same content.

Step 2 of 3: Renew Your Forms



If you request is still active and you wish to extend the deadline before the request automatically expires, update the request date.

1. Click on **EDIT**
2. Update the **ORDER START DATE** to Today's date to reinitiate the 7-day count-down
3. Click **SAVE**

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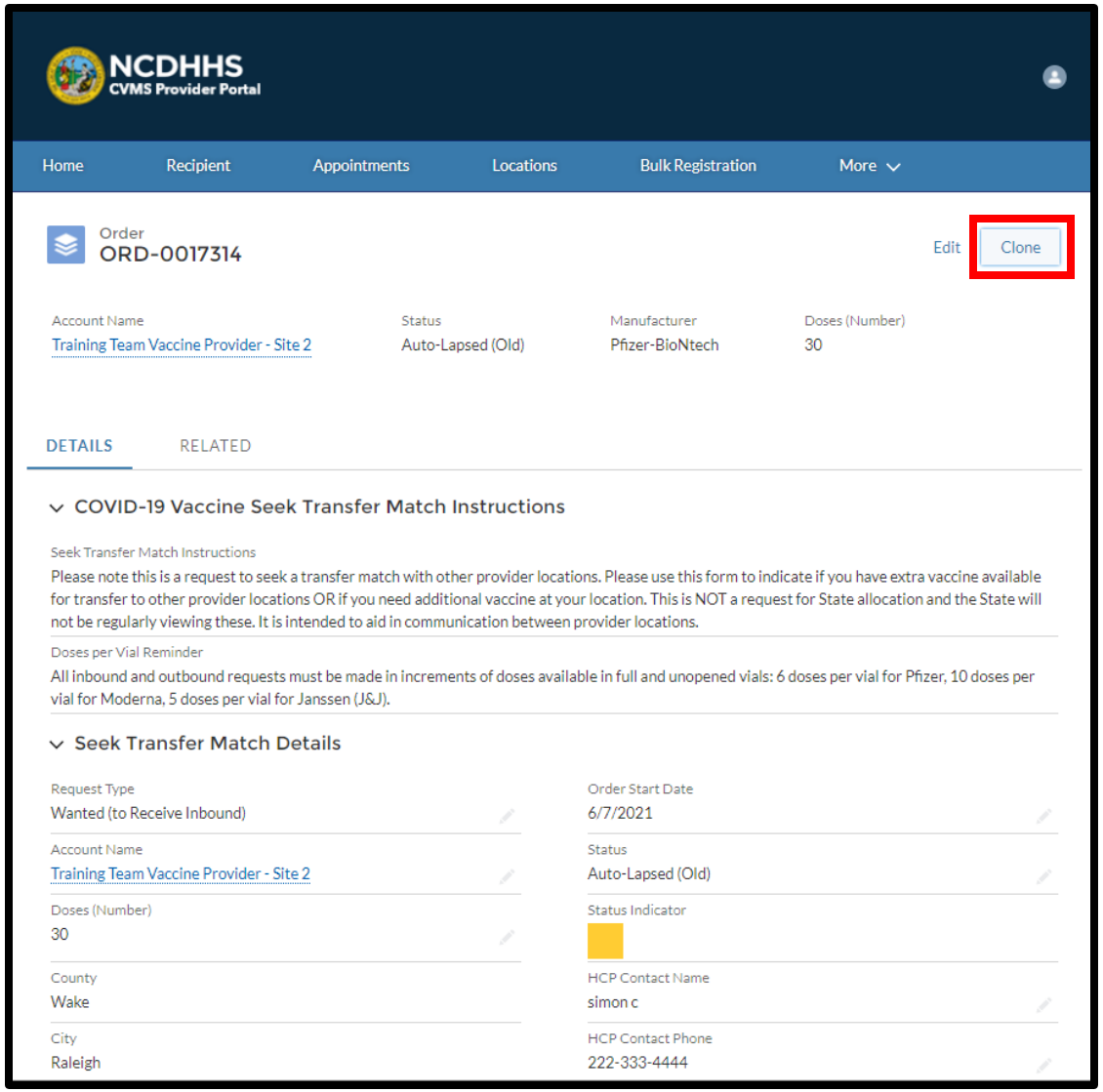
Step 3 of 3: Clone Your Forms



If your request's status is **AUTO-LAPSED (OLD)** or **CLOSED/INACTIVE** and you wish to post an identical new form, use the clone feature.

1. Click on **CLONE**
2. Update the **ORDER START DATE** to Today's date to reinitiate the 7-day count-down
3. Update the Status to **ACTIVE**
4. Update any other fields if necessary
5. Click **SAVE**

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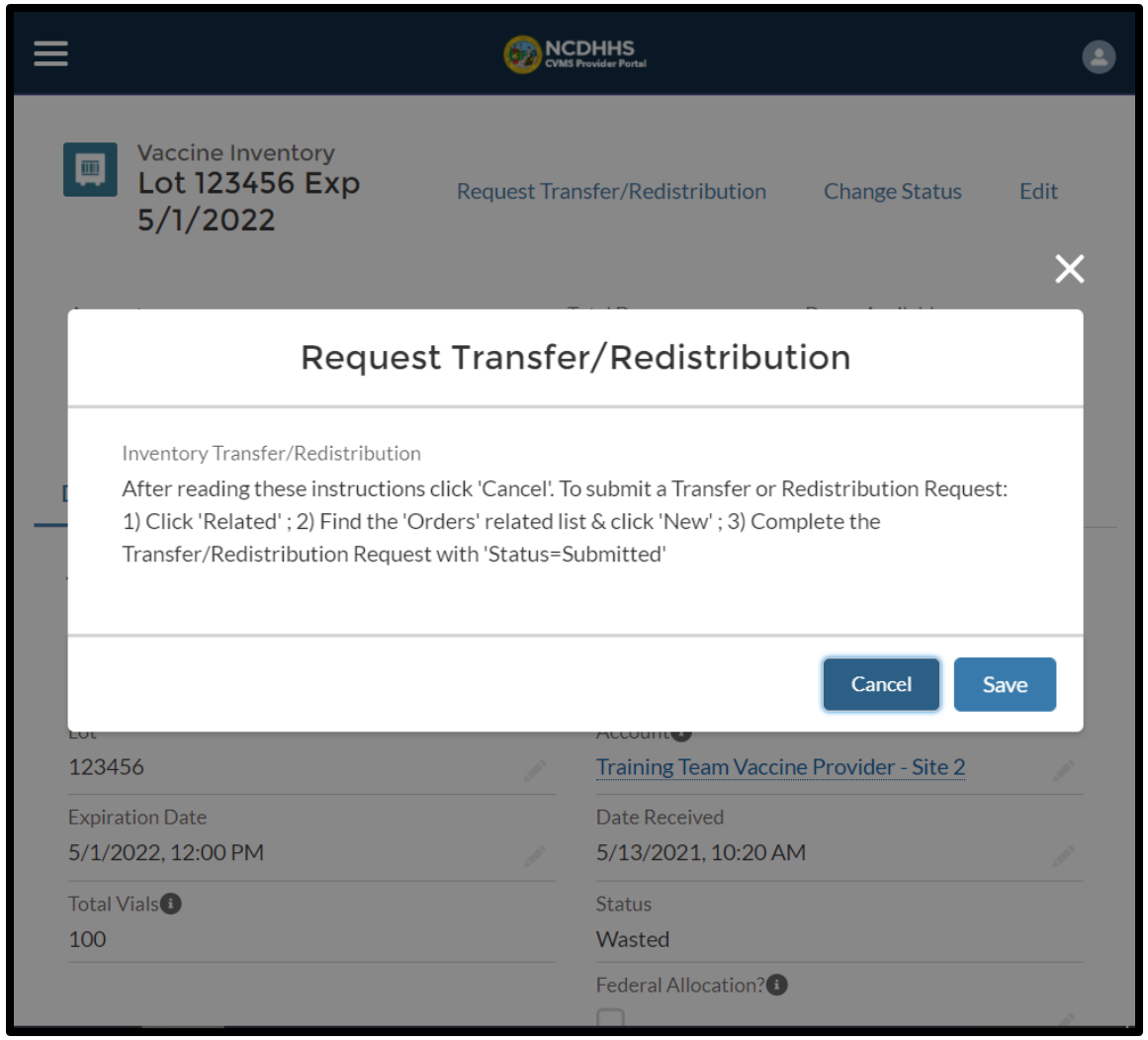
Transfer Vaccine between two Providers

Transfer Vaccine Inventories between two locations



When a COVID-19 vaccine is to be redistributed / transferred to another provider location

- Healthcare Location Manager enters the COVID-19 Vaccine Redistribution/Transfer Request into the CVMS Provider Portal with details such as Sending Location, Receiving Location, lot number, and quantity to redistribute/transfer. The approved redistribution/transfer is reflected as an order for the Receiving Location.
- The COVID-19 Vaccine On Hand inventory of the sending location is decreased. The receiving location has a COVID-19 Vaccine Inventory Record auto-created, but the quantity is noted as "in transit".
- Receiving Location completes "Inbound Redistribution/Transfer" process, and the quantity is changed from "in transit" to "available".

Initiate an Outbound Transfer or Redistribution

Overview of an Outbound Redistribution/Transfer

Redistribution and transfer requests require **NCDHHS IMMUNIZATION BRANCH APPROVAL** to ensure proper storage capabilities and tracking of COVID-19 Vaccine Inventory movements. There are three scenarios that transfer requests will fall under.

1. If a provider requests a redistribution between two CVMS Provider locations within the same organization, who have an existing redistribution agreement, **THE TRANSFER IS AUTOMATICALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
2. If a provider requests a redistribution between two locations within the same organization, but there is no existing redistribution agreement, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
3. If a provider requests a transfer to a location that is outside their location's organization, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**

Audience

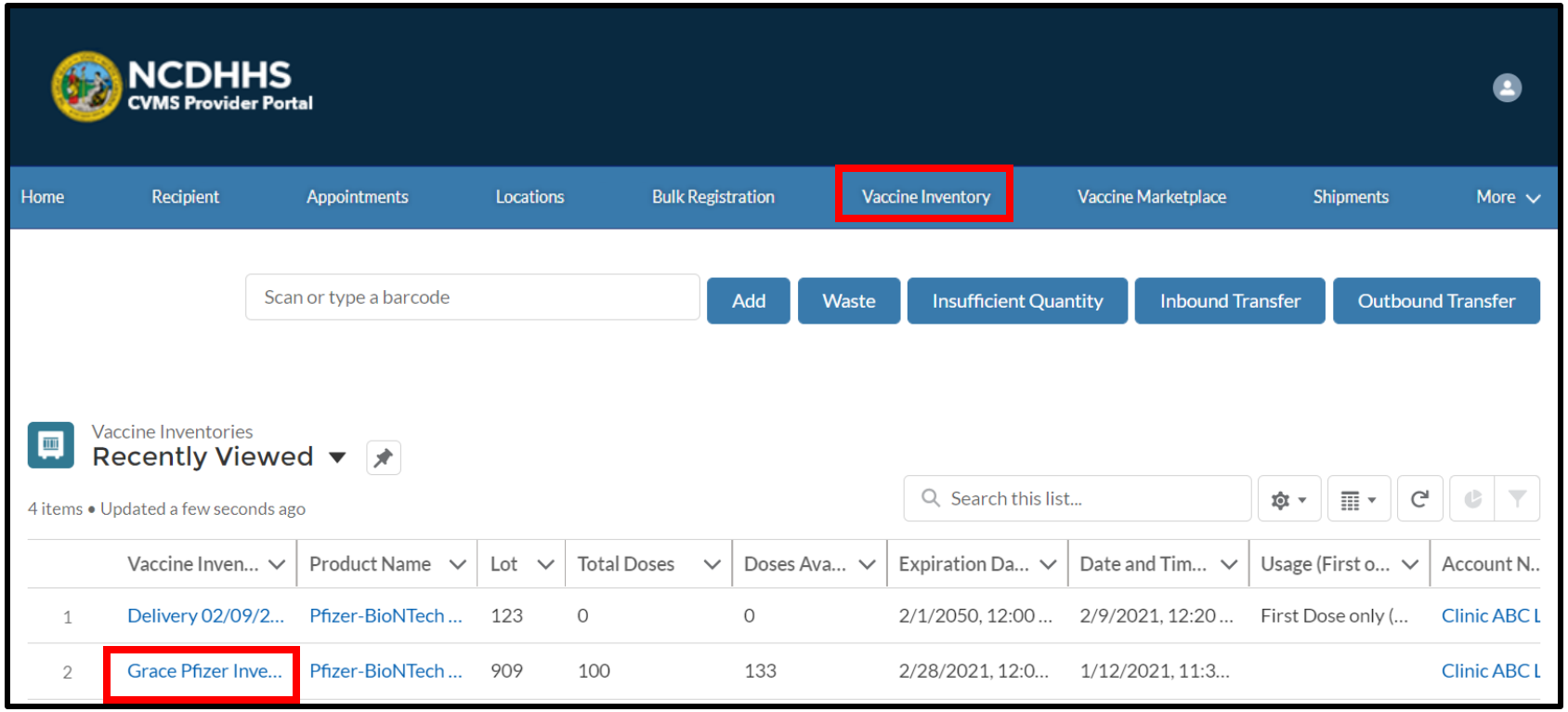
Healthcare Location Manager

Step 1 of 10: Locate Inventory for Redistribution/Transfer

To initiate an **OUTBOUND REDISTRIBUTION/TRANSFER** to another location, you will have to submit a request through the CVMS Provider Portal.

1. From the Home Page, click the **VACCINE INVENTORY** tab

2. Select the correct **VACCINE INVENTORY** Record that you want to redistribute/transfer to a different location / organization



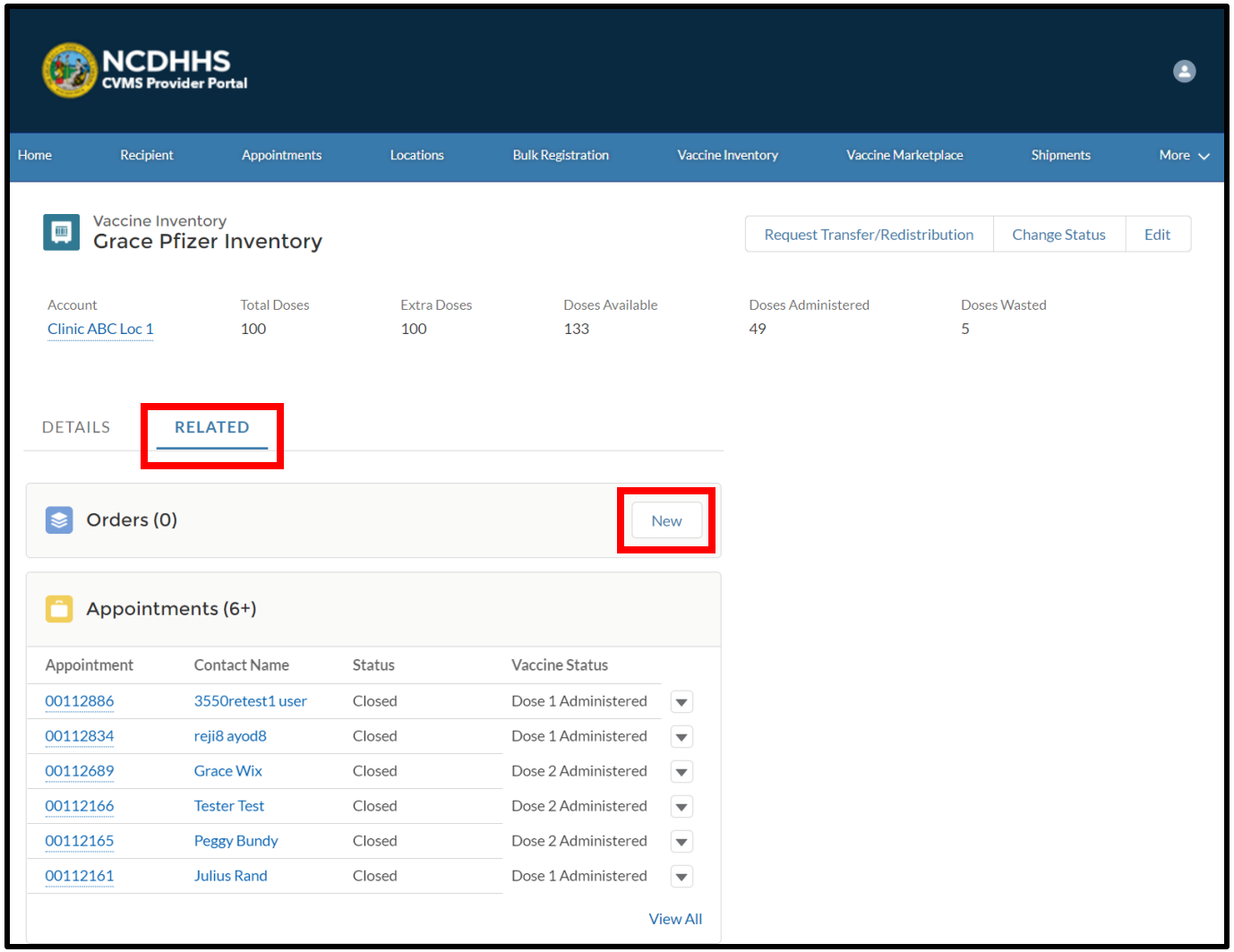
Audience

Healthcare Location Manager

Tips

Selecting the **OUTBOUND TRANSFER** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

Step 2 of 10: Creating a Transfer/Redistribution Request



1. From the Vaccine Inventory Record, select the **RELATED** tab
2. Locate the **ORDERS** related list and click **NEW**

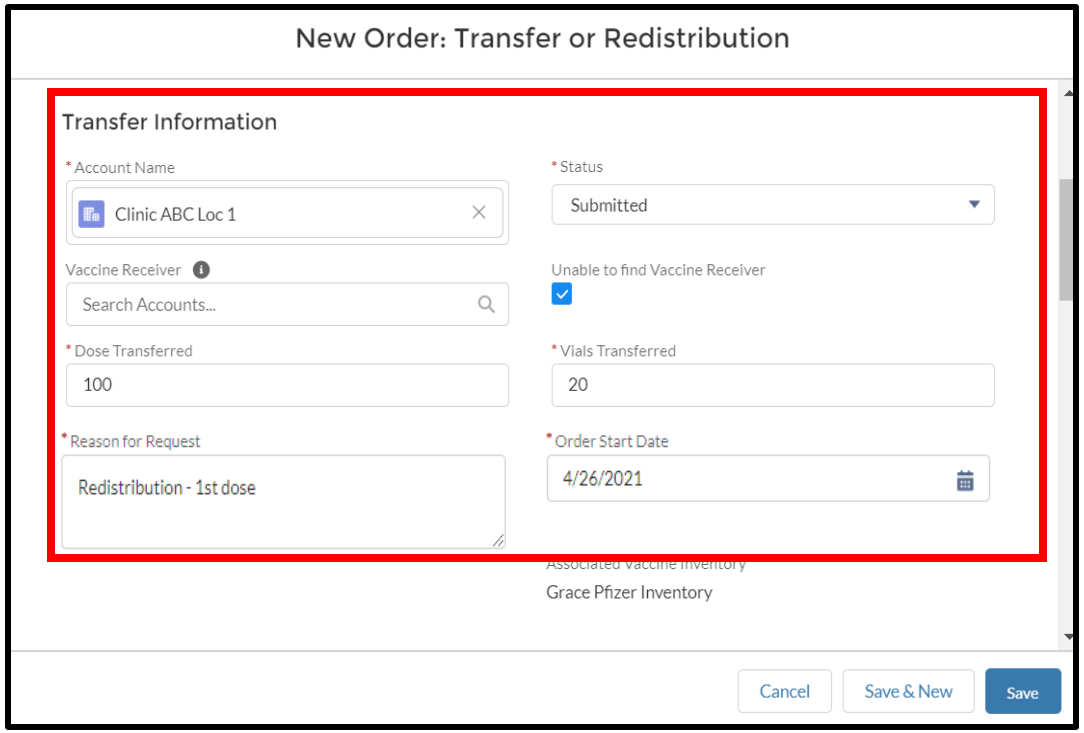
Audience

Healthcare Location Manager

Tips

Selecting the **REQUEST TRANSFER / REDISTRIBUTION** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

Step 3 of 10: Edit the Order Transfer Record



A pop-up window will appear titled **NEW ORDER: TRANSFER OR REDISTRIBUTION** for you to fill out.

1. Enter your own location for **ACCOUNT NAME**
2. Select **SUBMITTED** for status
3. If the receiving provider / location is in your organization, enter the name of the receiving provider in the **VACCINE RECEIVER** field
4. If the receiving provider / location is outside your organization, select the **UNABLE TO FIND VACCINE RECEIVER** button
5. Enter the desired number of doses to be transferred
6. Enter the desired number of vials to be transferred
7. Enter the reason for the request
8. Enter the desired date for transfer

Audience

Healthcare Location Manager

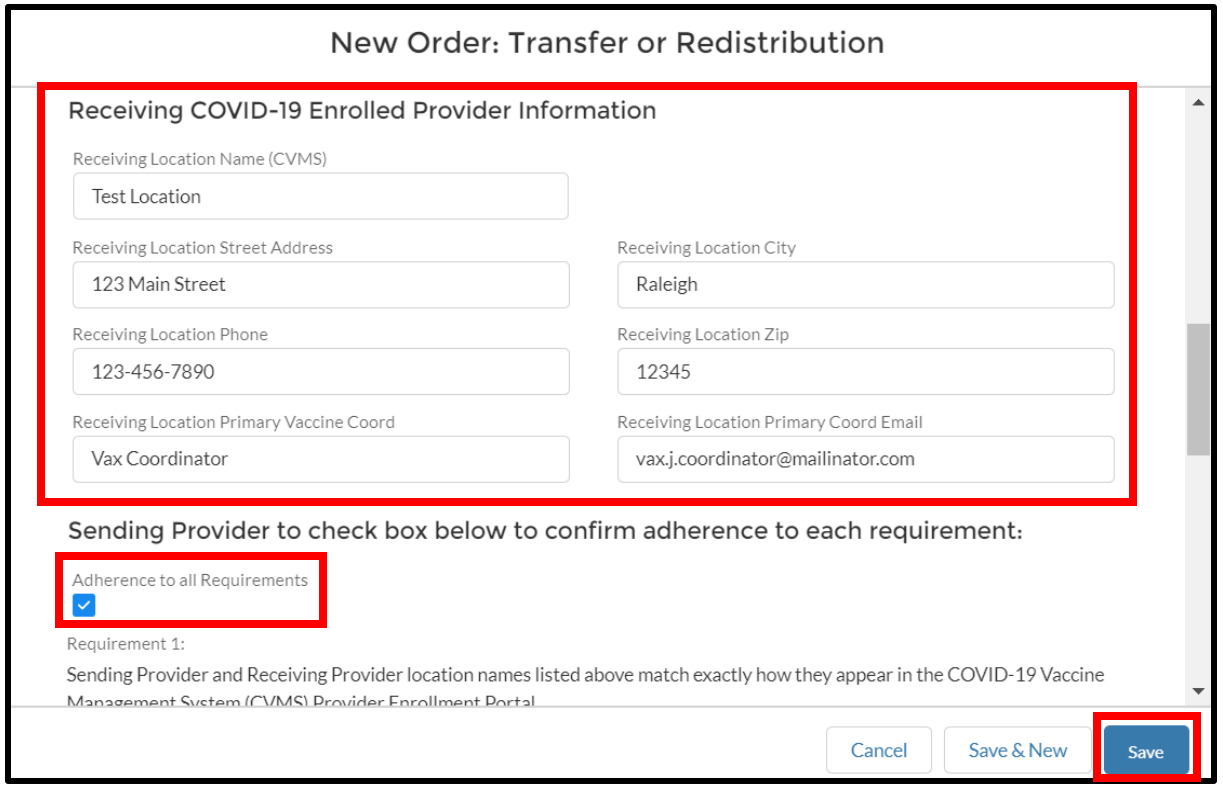
Tips

The doses transferred must be less than the doses currently available on the selected Vaccine Inventory Record.

The Vials Transferred number must be equal to the Doses Transferred divided by the standard doses per vial for the vaccine inventory.

Save request as a Draft Status to review all information prior to submitting. Transfer request will be reviewed once the request status has been changed to submitted.

Step 4 of 10: Submit the Order Transfer Record



Scroll down within the **NEW ORDER: TRANSFER OR REDISTRIBUTION** pop-up window.

1. If the receiving provider / location is in your organization, do not enter any information in the **RECEIVING COVID-19 ENROLLED PROVIDER INFORMATION** section
2. If the receiving provider / location is outside your organization, fill in the Location Name, Street Address, City, Phone Number, Zip Code, and Vaccine Coordinator's Name and Phone Number for the receiving provider
3. Review all the listed requirements for initiating a transfer / redistribution request
4. Select the **ADHERENCE TO ALL REQUIREMENTS** checkbox
5. Click **SAVE**

Audience

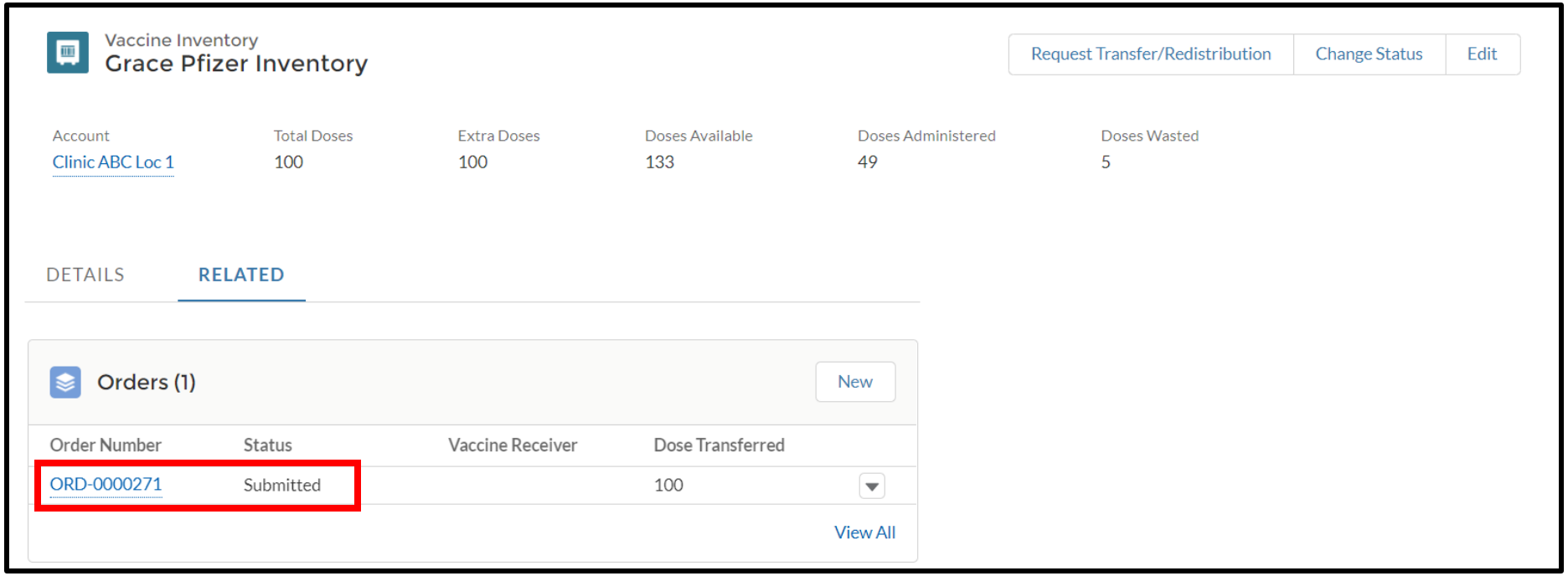
Healthcare Location Manager

Tips

You must fill in **ALL** fields in the **RECEIVING COVID-19 ENROLLED PROVIDER INFORMATION** section if you selected the **UNABLE TO FIND VACCINE RECEIVER** checkbox at the top of the form.

Step 5 of 10: Confirm the Redistribution/Transfer Request was Submitted

1. On the **ORDERS** related list from the Vaccine Inventory Related Tab, the new Order redistribution or transfer request will appear
2. If the status shows as **SUBMITTED** or **PROCESSING**, that indicates the redistribution or transfer is pending approval from NCDHHS Immunization Branch
3. If the status appears as **TRANSFER IN TRANSIT**, that indicates the transfer has been approved by NCDHHS Immunization Brach



Audience

Healthcare Location Manager

Step 6 of 10: Provide Redistribution/Transfer Details

Once your **NC COVID-19 VACCINE REDISTRIBUTION/TRANSFER REQUEST** is approved, you will be able to **SHIP YOUR VACCINE INVENTORY** to the receiving location.

As soon as the transfer is approved, the Healthcare Location Manager who initiated the transfer request will receive an automated email indicating the approval.

[External] Sandbox: CDC COVID-19: Transfer/Redistribution Approved - 100 doses to Te...

NC CVMS <nccvms@dhhs.nc.gov>

To

Reply | Reply All | Forward | ...

Thu 2/11/2021

If there are problems with how this message is displayed, click here to view it in a web browser.

Hello ,

Your Transfer/Redistribution request has been approved. Please see below for details and send this as soon as possible.

Transfer/Redistribution Details:

- **Sending Location:** Clinic ABC Loc 1
- **Receiving Location:** Test Location
- **Doses:** 100
- **Vials:** 20
- **Lot:** 909
- **Vaccine Product:** Pfizer-BioNTech (5 doses/vial) (195 MDV) COVID-19 Vaccine

Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine.

Thank you, NC Department of Health and Human Services

Division of Public Health

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

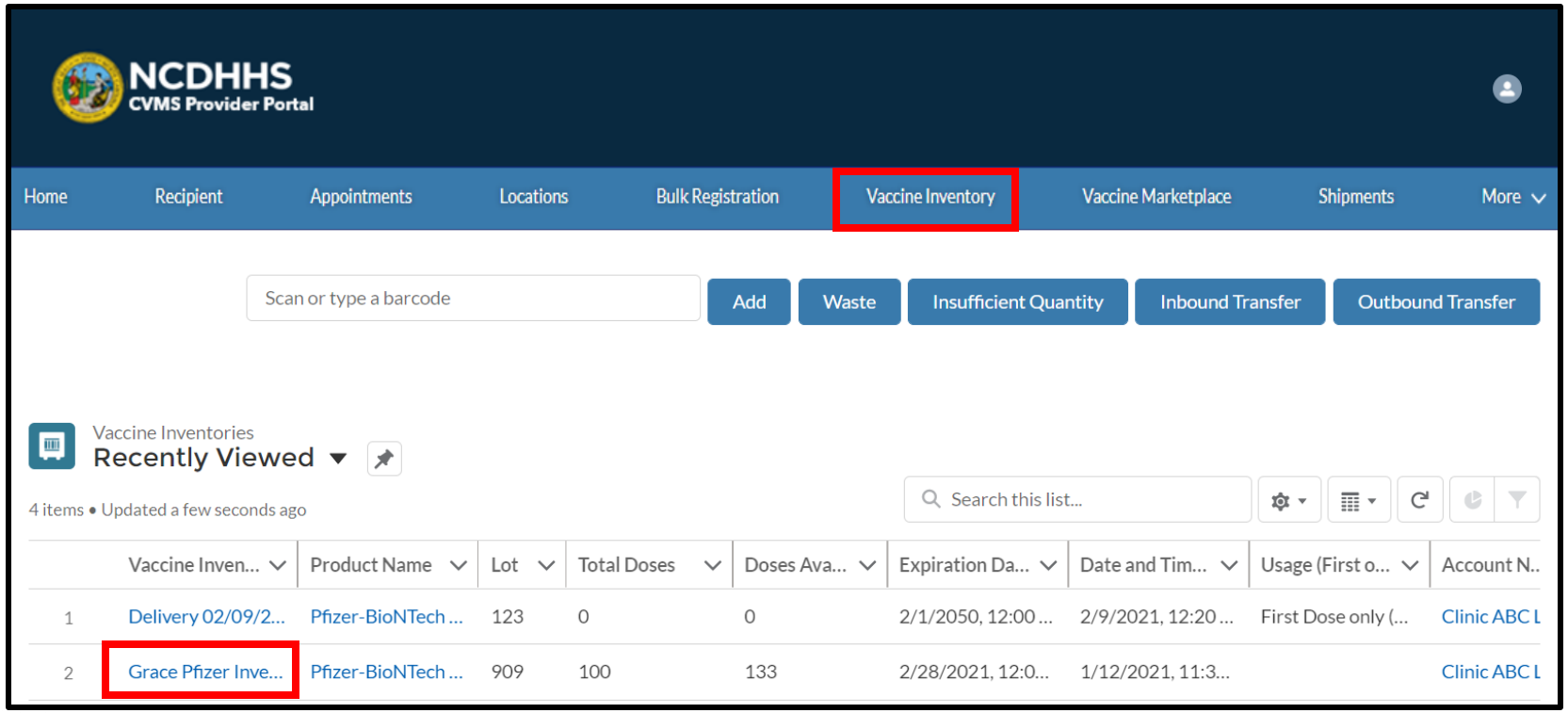
Audience

Healthcare Location Manager

Step 7 of 10: Provide Redistribution/Transfer Details

You can **UPDATE** the Order Transfer Record with the **ACTUAL SHIPMENT DETAILS** to support tracking of the shipment. The Order Transfer Record can be located via the Vaccine Inventory Record that is providing the inventory.

1. From the Home page, click the **VACCINE INVENTORY** tab
2. Select the correct **VACCINE INVENTORY** Record

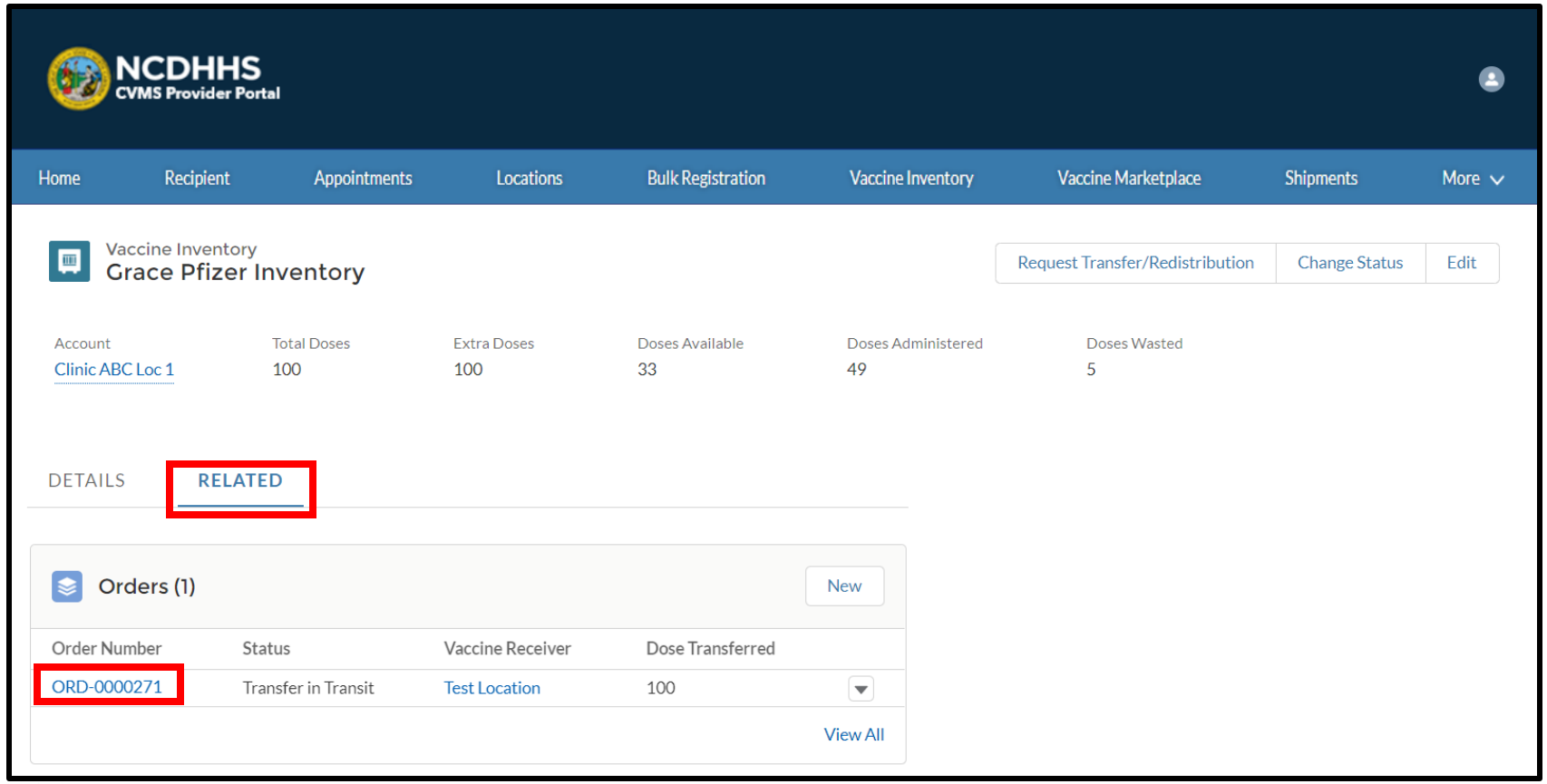


Audience

Healthcare Location Manager

Step 8 of 10: Open the Approved Redistribution/Transfer Request

1. Navigate to the **RELATED TAB**
2. Locate the Orders related list
3. Confirm that the Order is in **TRANSFER IN TRANSIT** status and click the **ORDER NUMBER** of the Transfer Request



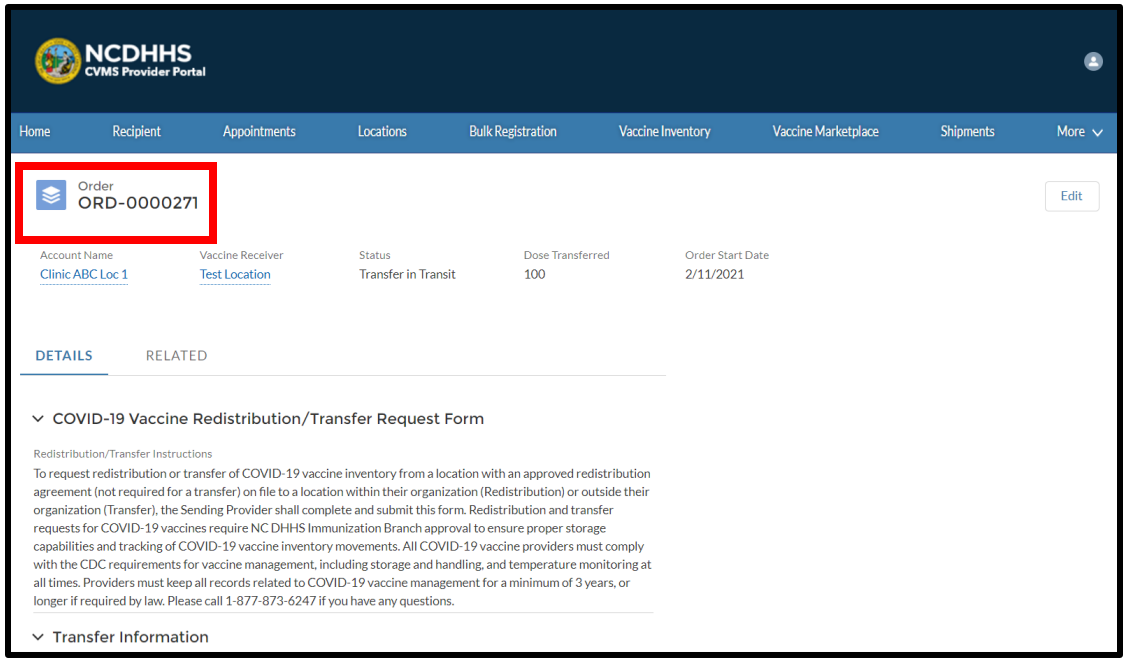
Audience

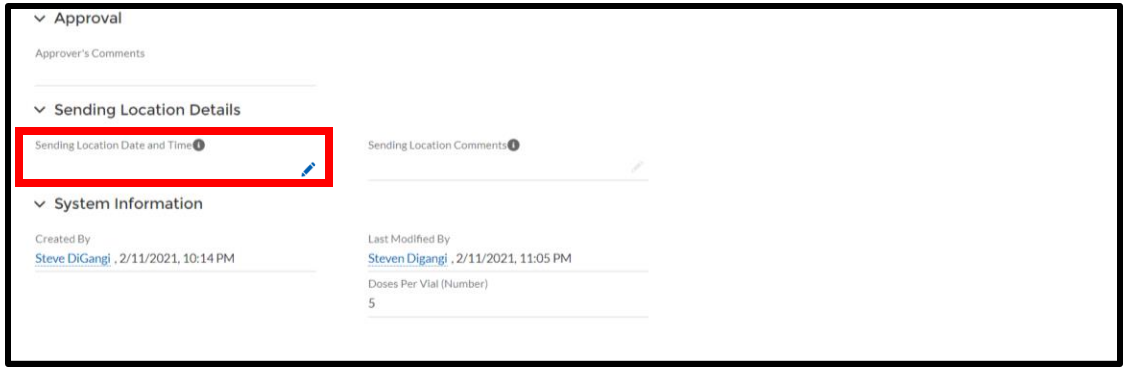
Healthcare Location Manager

Tips

Review the Vaccine Receiver to confirm it is the correct record.

Step 9 of 10: Update the Order Transfer Record





Once you have the **ORDER TRANSFER RECORD** open, you can provide the **SHIPMENT DETAILS REQUIRED**.

1. Scroll down to the **SENDING LOCATION DETAILS** section
2. Click the **PENCIL ICON** next to **SENDING LOCATION DATE AND TIME**

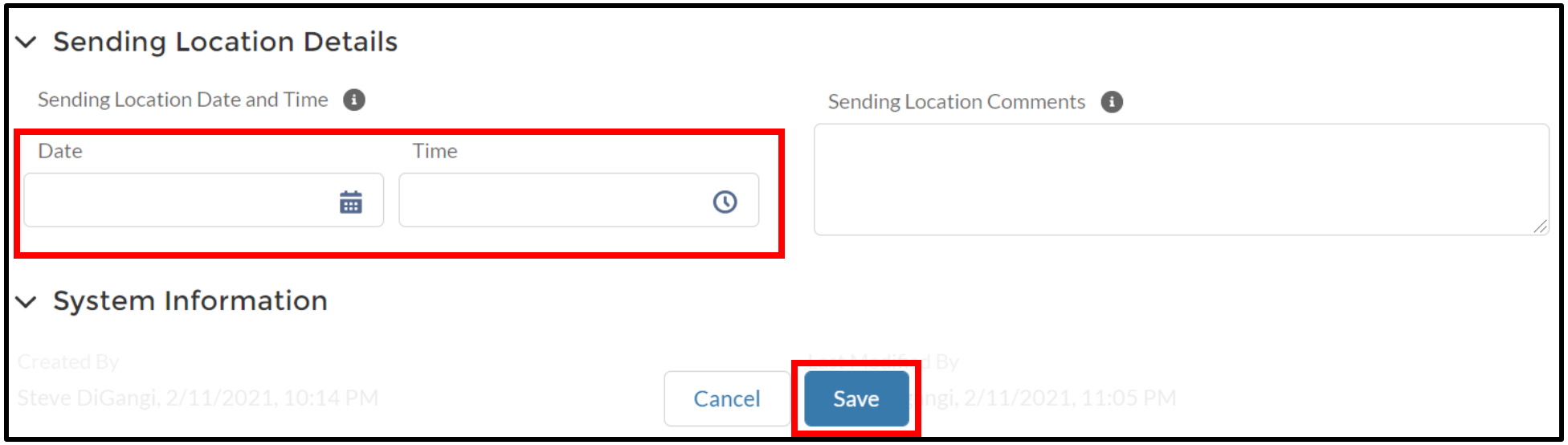
Audience

Healthcare Location Manager

Step 10 of 10: Submit Shipment Details

Once you click edit, you will be able to update the record and save your changes.

1. Enter the **SENDING LOCATION DATE** and **TIME** when shipment was sent
2. Enter the **SHIPMENT TRACKING INFORMATION** in the **SENDING LOCATION COMMENTS** field
3. Click **SAVE**



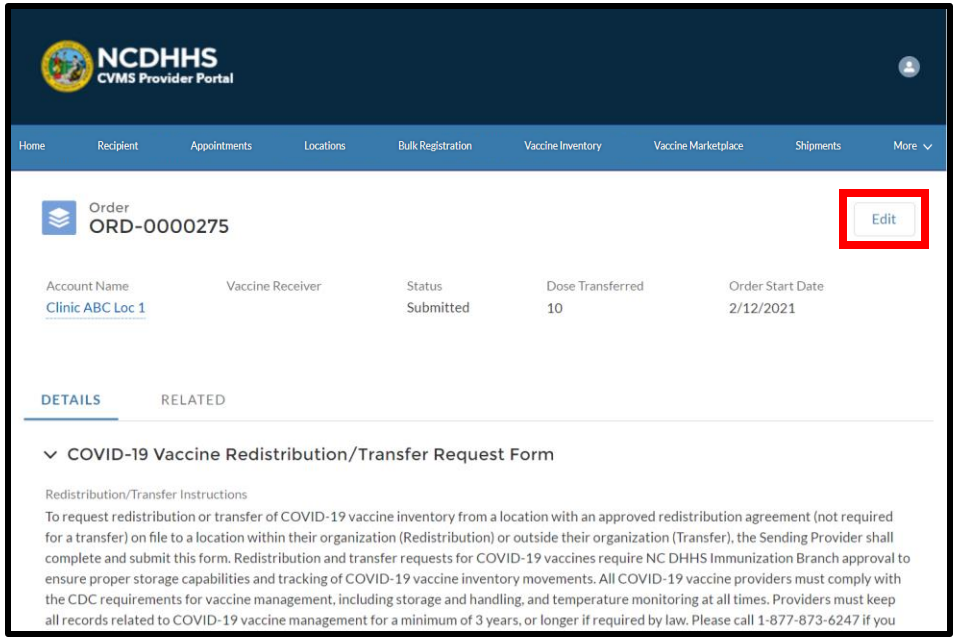
Audience

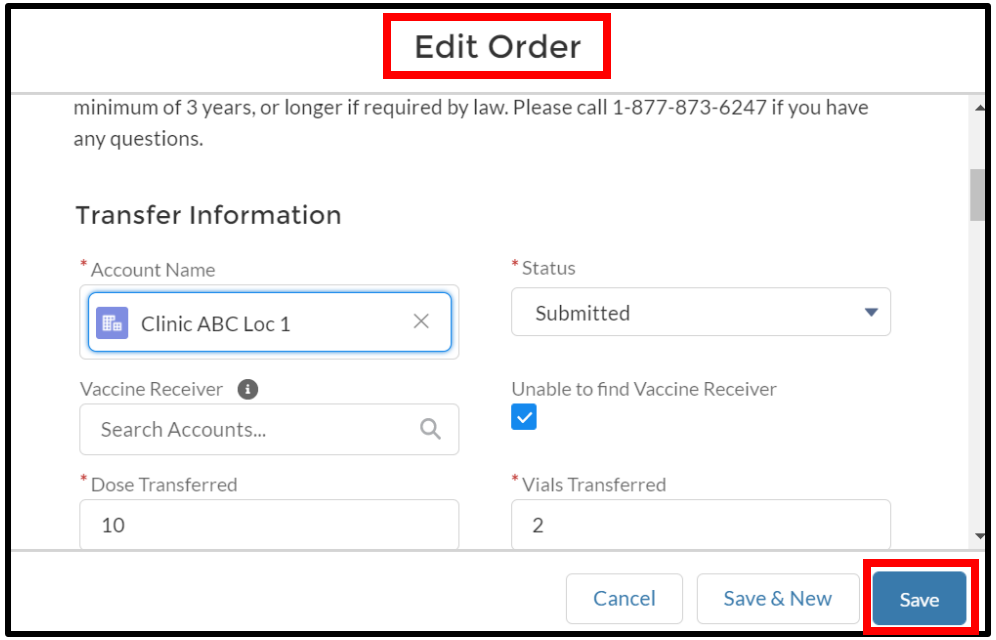
Healthcare Location Manager

Editing Order Redistribution or Transfer Requests

Transfer requests can still be **EDITED** while in **SUBMITTED** or **DRAFT** status.

1. Select the Vaccine Inventory Record that has a transfer request
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **SUBMITTED** or **DRAFT** status
3. Click on the **EDIT** button
4. Make changes to the necessary fields and click **SAVE**

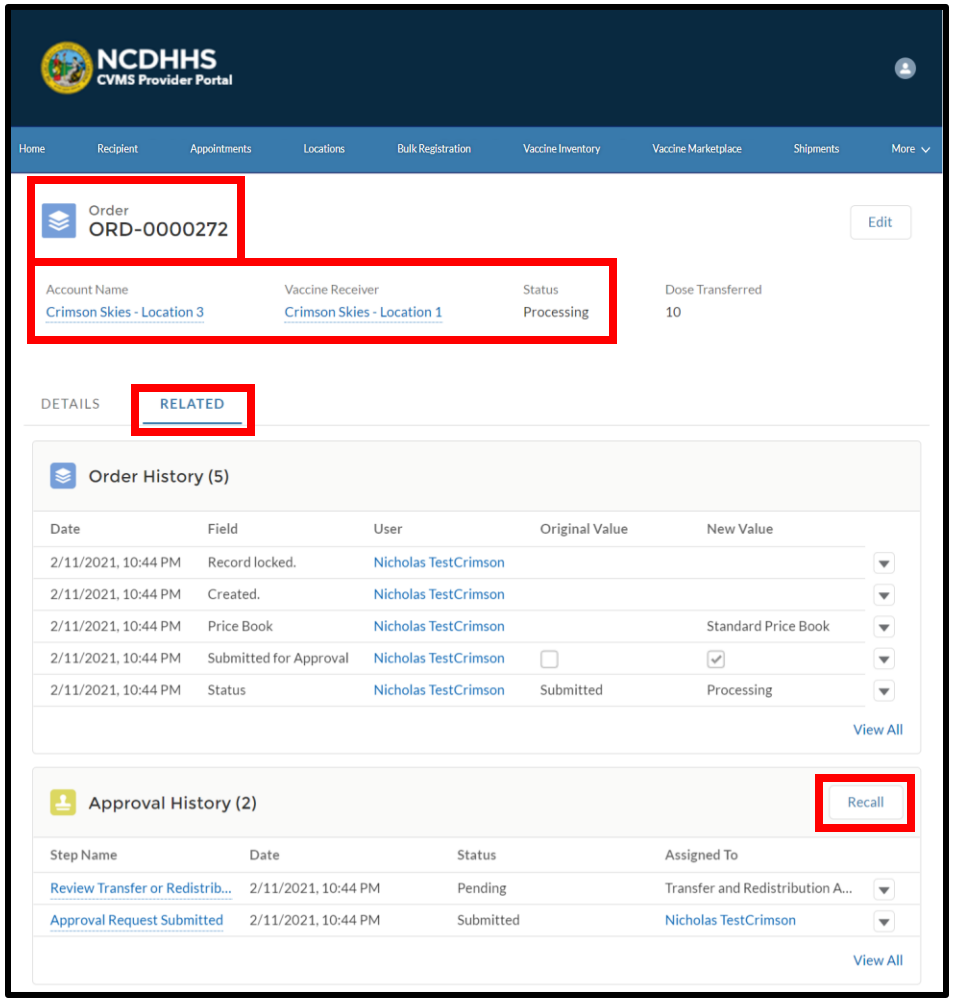




Audience

Healthcare Location Manager

Recalling Order Redistribution or Transfer Requests



Transfer requests can be **RECALLED** while in **PROCESSING** status. The recall function is only used when transferring between two locations in the same organization that do not have an existing redistribution agreement (Scenario #2 from the **Overview of an Outbound Redistribution/Transfer slide**). In any other scenario, the Healthcare Location Manager should use the **EDIT** capability.

1. Select the **VACCINE INVENTORY RECORD** that has a transfer request.
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **PROCESSING** status
3. Navigate to the **RELATED** tab on the Order Transfer Record
4. Scroll down to Approval History and click on **RECALL**
5. Add comments and click **RECALL**
6. **ORDER WAS RECALLED** will appear at the top of the screen

Audience

Healthcare Location Manager

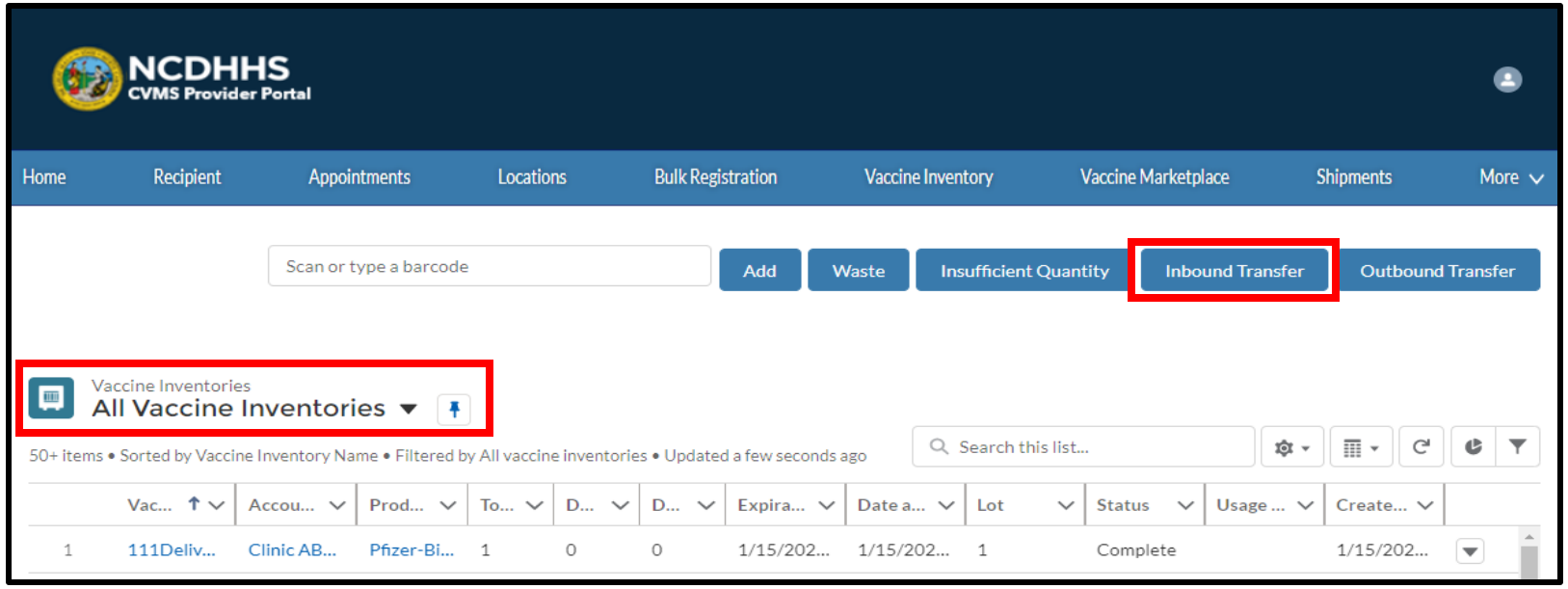
Receive Inbound Transfer or Redistribution

Step 1 of 4: Processing an Inbound Redistribution/Transfer

If you are **RECEIVING** an **INBOUND REDISTRIBUTION/TRANSFER** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound redistribution/transfer, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound redistributions/transfers from the **ADD INVENTORY PROCESS**.

1. From the home page, click **VACCINE INVENTORY**
2. Click **INBOUND TRANSFER**



Audience

Healthcare Location Manager

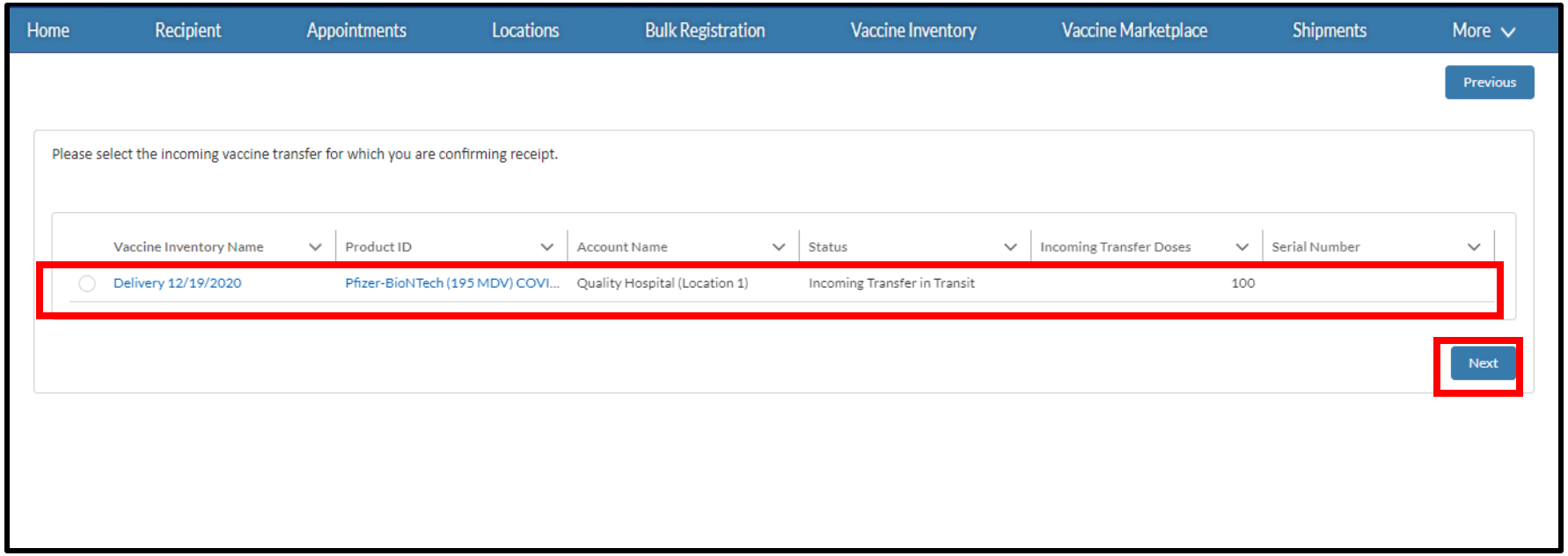
Tips

Inbound redistributions/ transfers are **not** processed from the Add Inventory Process.

Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** Records that are incoming redistributions/transfers to your location. 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. Click **NEXT**



Audience

Healthcare Location Manager

Tips

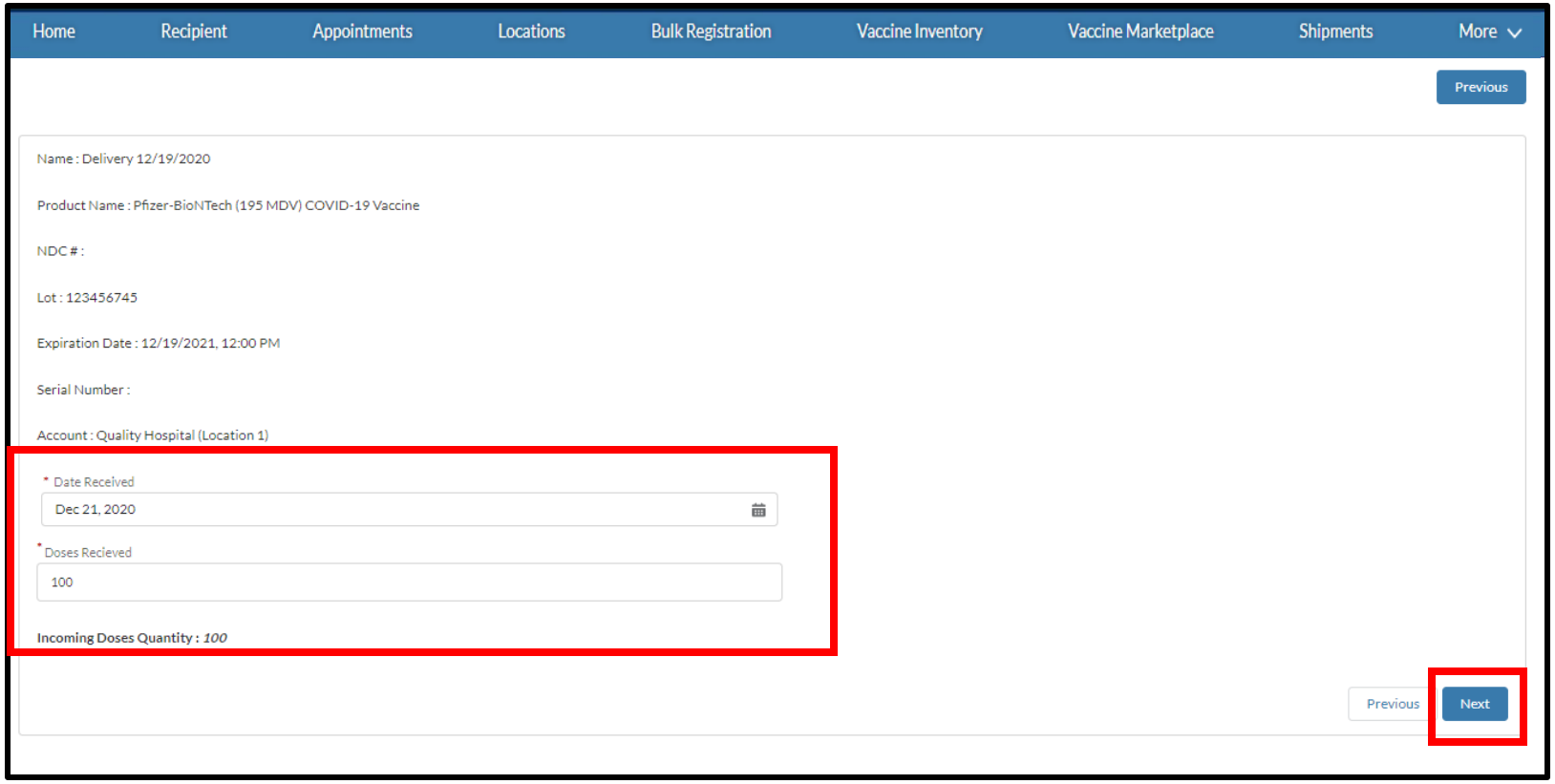
Identify Vaccine Inventory Records for inbound redistribution/transfer.

Step 3 of 4: Complete the Inbound Transfer form

Once you select the Vaccine Inventory Record, you will see the Vaccine Inventory details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound redistribution/transfer is now processed.

1. Enter the **DATE RECEIVED**
2. Enter the **DOSES RECEIVED**
3. Click **NEXT**



Audience

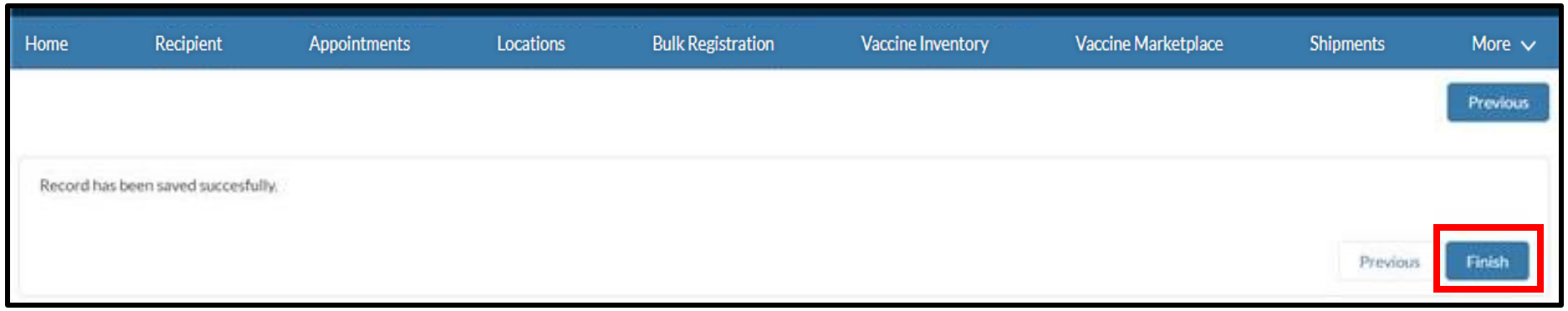
Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 4 of 4: Complete the Inbound Transfer form

After clicking next, your inbound redistribution/transfer is processed and added to your inventory.

1. Click **FINISH**



Audience

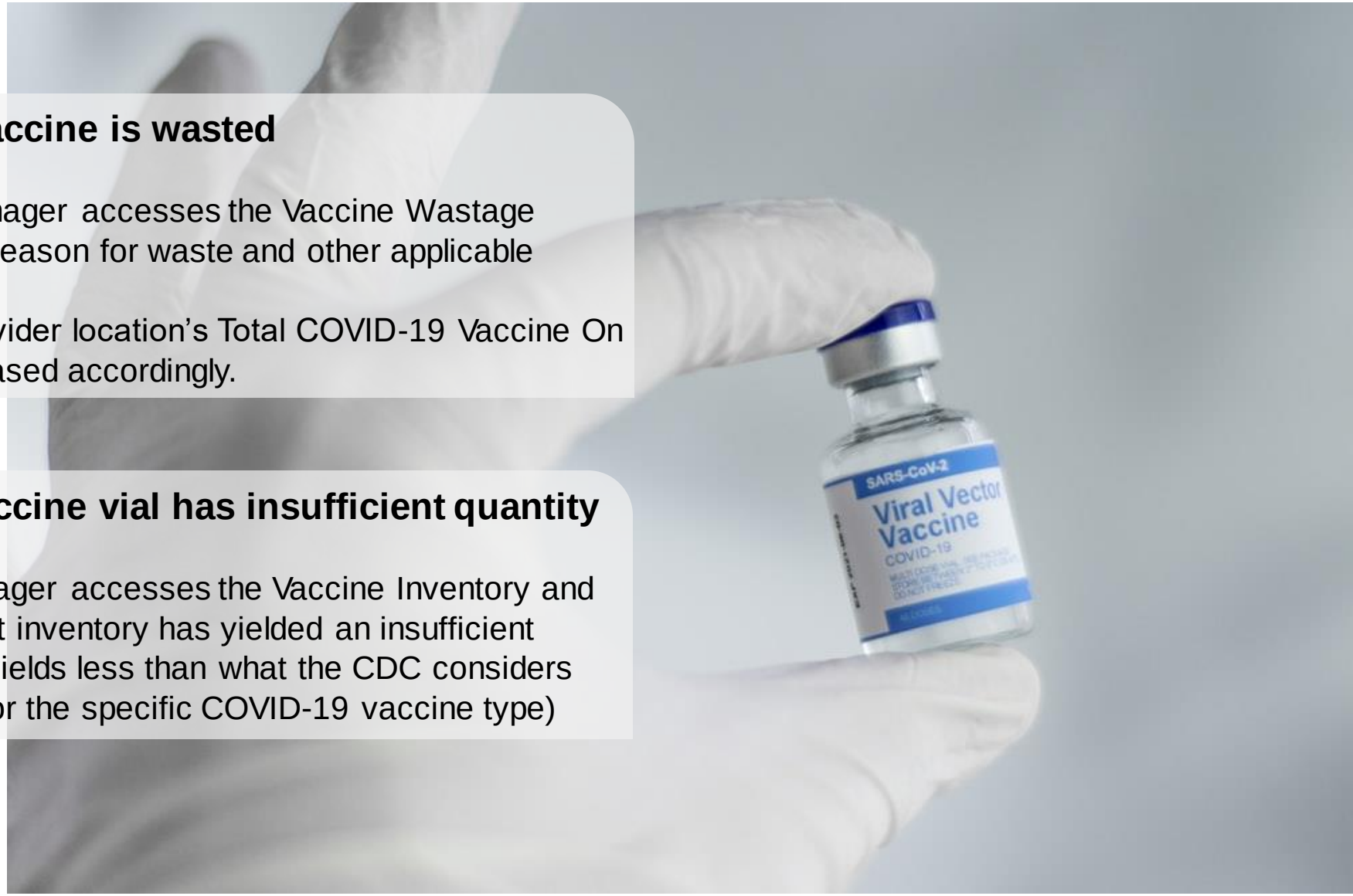
Healthcare Location Manager

Tips

Complete the inbound transfer form by clicking Finish.

Document Vaccine Inventory Deprecation

When to declare in CVMS a COVID-19 Vaccine Inventory Deprecation



When a COVID-19 vaccine is wasted

Healthcare Location Manager accesses the Vaccine Wastage Survey Form, providing reason for waste and other applicable information.
Once submitted, the provider location's Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.

When a COVID-19 vaccine vial has insufficient quantity

Healthcare Location Manager accesses the Vaccine Inventory and inputs that a vial from that inventory has yielded an insufficient quantity (any time a vial yields less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type)

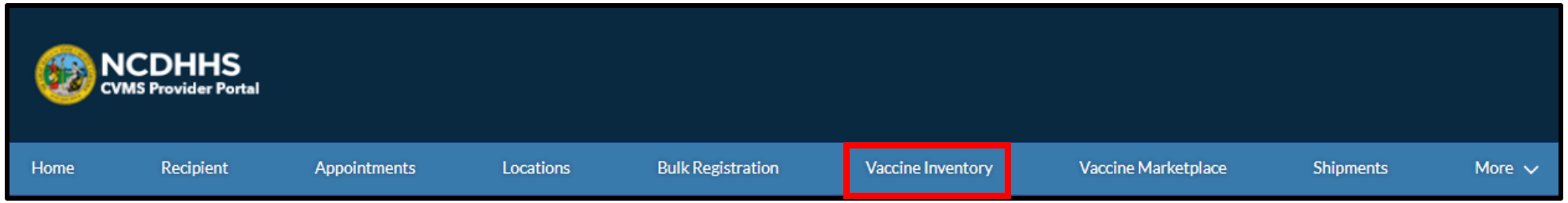
Log a Vaccine Wastage

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 vaccine inventory management guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE WASTAGE** events for all COVID-19 Vaccine Types in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Wastage will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Vaccine Wastage include breaking vial/syringe and lost COVID-19 vaccines.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



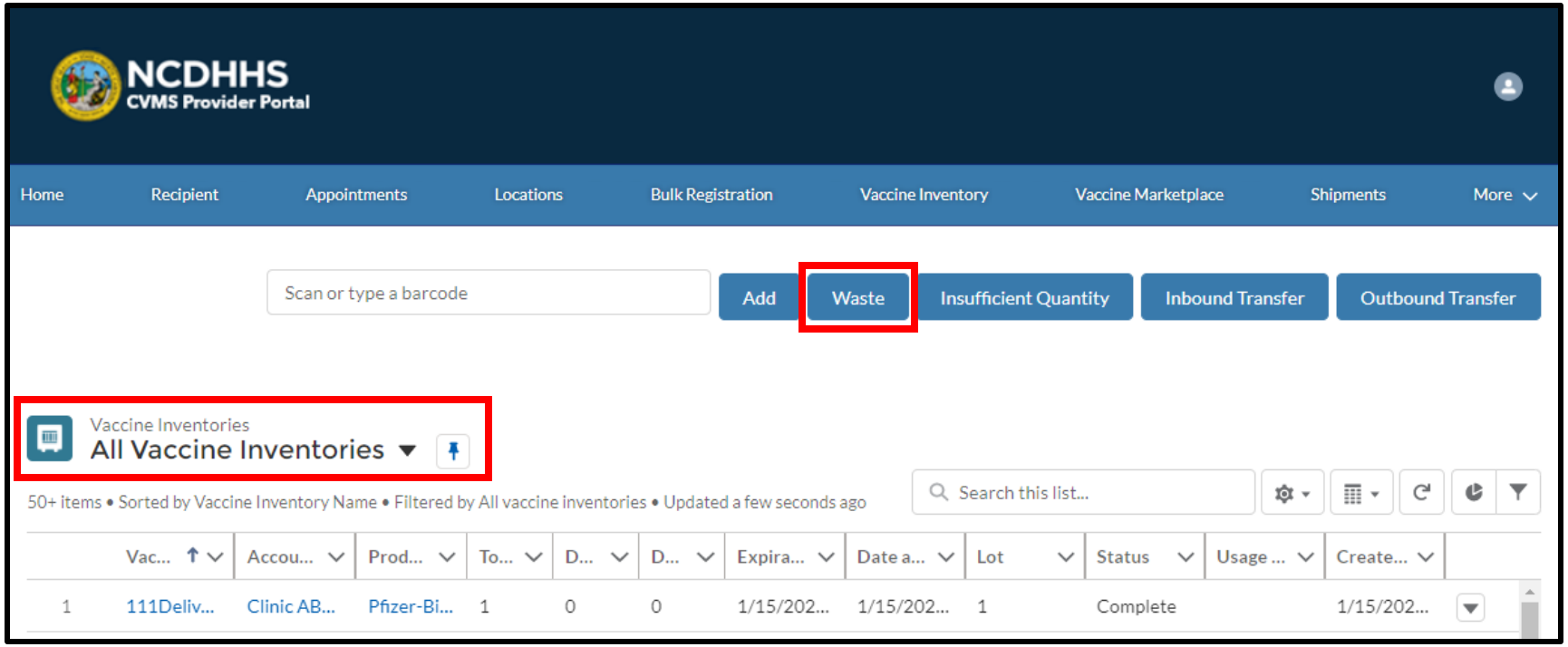
Audience

Healthcare Location Manager

Step 2 of 5: Open the Vaccine Wastage Survey form

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. The **ALL VACCINES LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

1. Click **WASTE** at the top of the page
2. After clicking **WASTE**, you will be directed to the **VACCINE WASTAGE SURVEY FORM**



Audience

Healthcare Location Manager

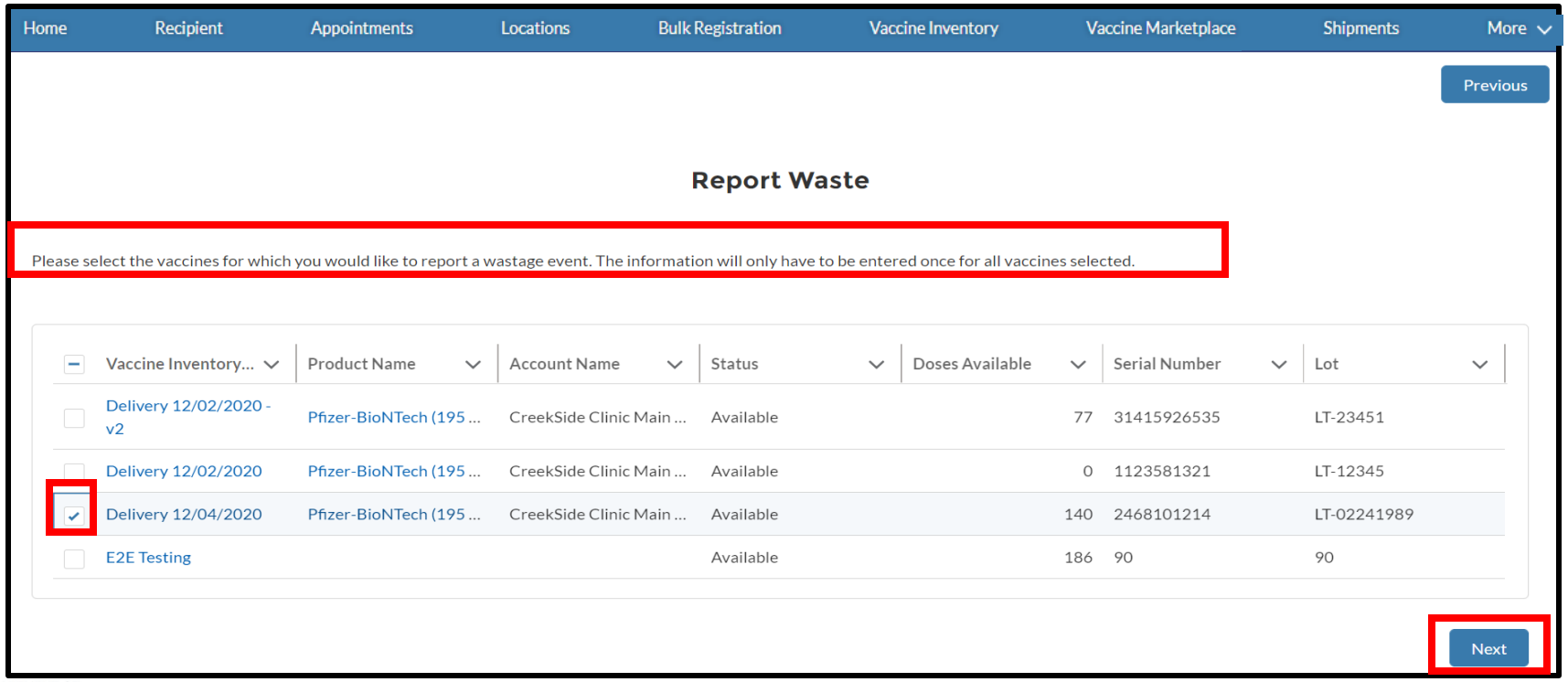
Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory Hyperlink.

Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report waste. At the bottom, you will see **ALL WASTAGE EVENTS** displaying all previously recorded COVID-19 vaccine inventory waste.

1. Check the **BOX** for the **APPROPRIATE ROW(S)**
2. Click **NEXT** at the bottom of the page
3. After clicking **NEXT**, you will see the **VACCINE WASTAGE SURVEY FORM**



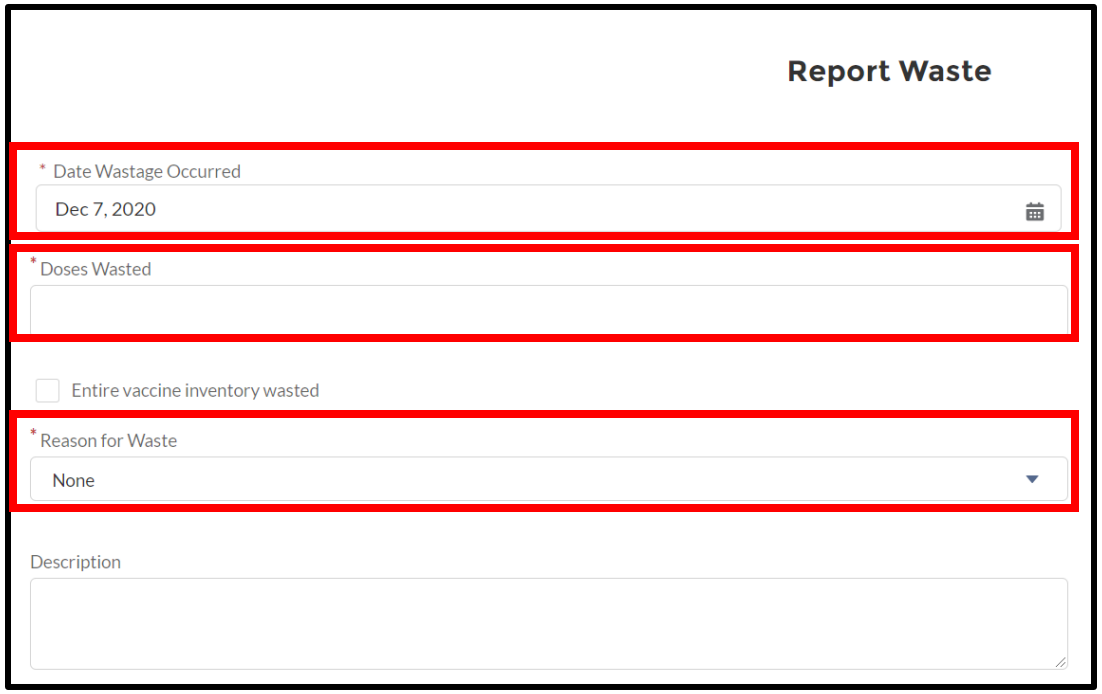
Audience

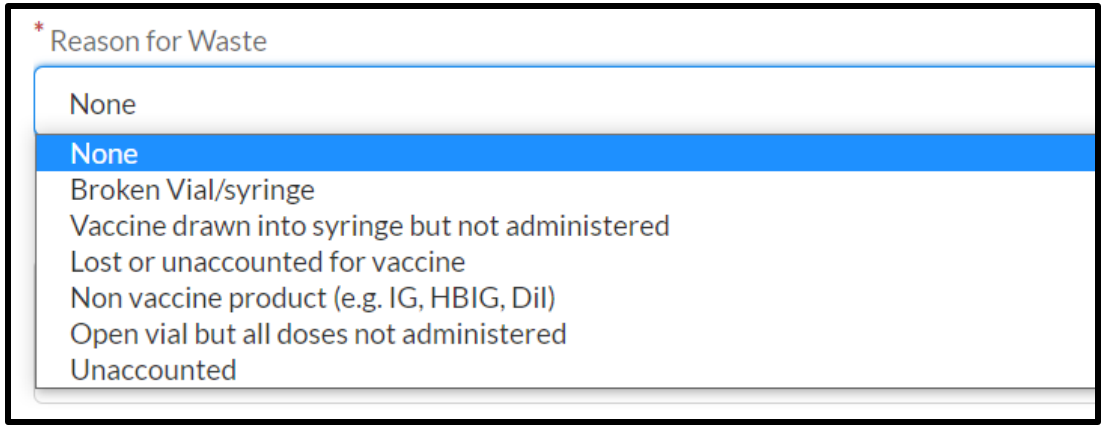
Healthcare Location Manager

Tips

You will be able to report a Partial or Full Vaccine shipment wastage on the next page.

Step 4 of 5: Complete the Vaccine Wastage Survey form





1. Populate the required **REPORT WASTE FIELDS:**
    1. Date Wastage Occurred
    2. Doses Wasted
    3. If you want to report the entire Vaccine Inventory wasted, check the Entire Vaccine Inventory Wasted Checkbox.
    4. Reason for Waste
2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once you are ready to submit the form, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

Audience

Healthcare Location Manager

Step 5 of 5: Submit the Vaccine Wastage Survey form

The **VACCINE WASTAGE RECORD** is now submitted, and your COVID-19 Vaccine Inventory Record will be automatically updated.

1. Click **FINISH**
2. After clicking **FINISH**, you will be directed back to the **INITIAL VACCINE WASTAGE SURVEY FORM PAGE**

Audience

Healthcare Location Manager

Tips

After clicking **FINISH**, you will see your Vaccine Wastage Record displayed on the All Wastage List View.

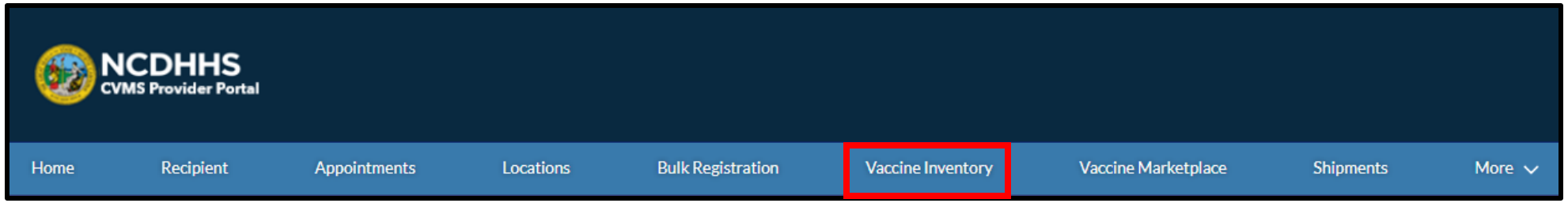
Log Insufficient Quantity

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 Vaccine Inventory Management Guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE INSUFFICIENT QUANTITY** events for all COVID-19 Vaccine Types in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Insufficient Quantity will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Insufficient Quantity events include any time less than the CDC standard doses are obtained from a vial for that specific vaccine manufacturer.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



Audience

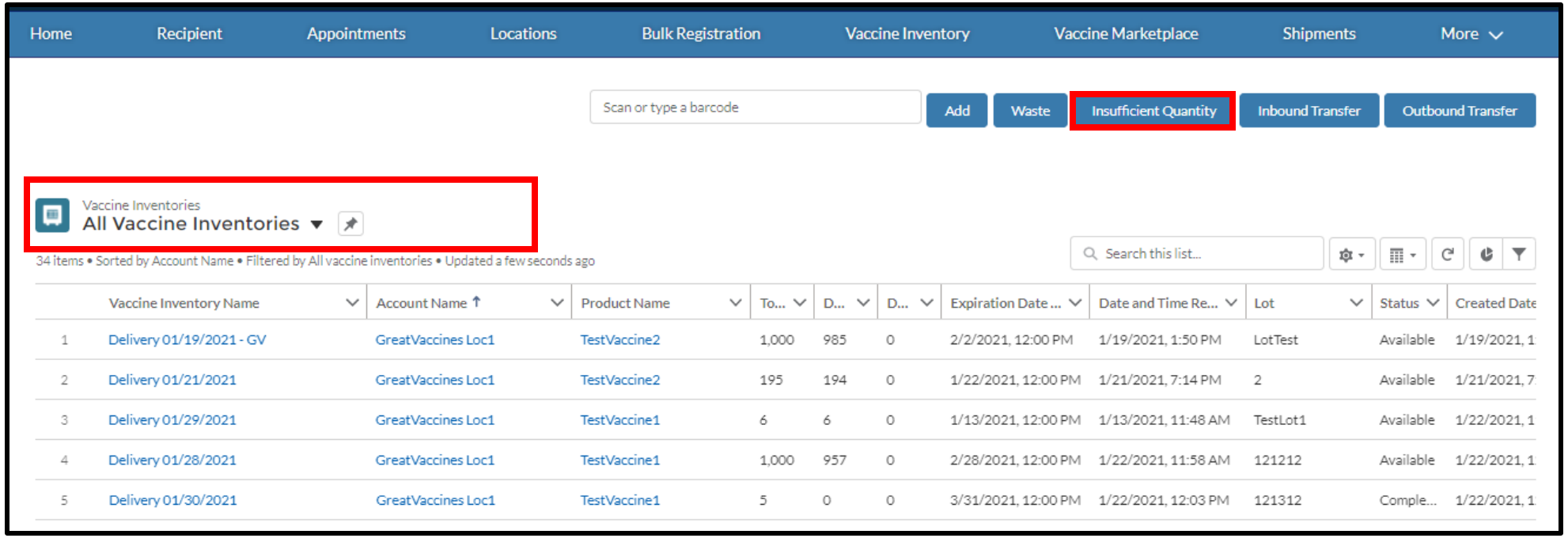
Healthcare Location Manager

Step 2 of 5: Click Insufficient Quantity at the top of the page

At the top of the page, you will see the different actions you can take to manage your COVID-19 Vaccine Inventory Records. The **ALL VACCINE INVENTORY LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

To record an Insufficient Quantity event:

1. Click **INSUFFICIENT QUANTITY** at the top of the page
2. After clicking **INSUFFICIENT QUANTITY**, you will be directed to the **VACCINE INSUFFICIENT QUANTITY** page



Audience

Healthcare Location Manager

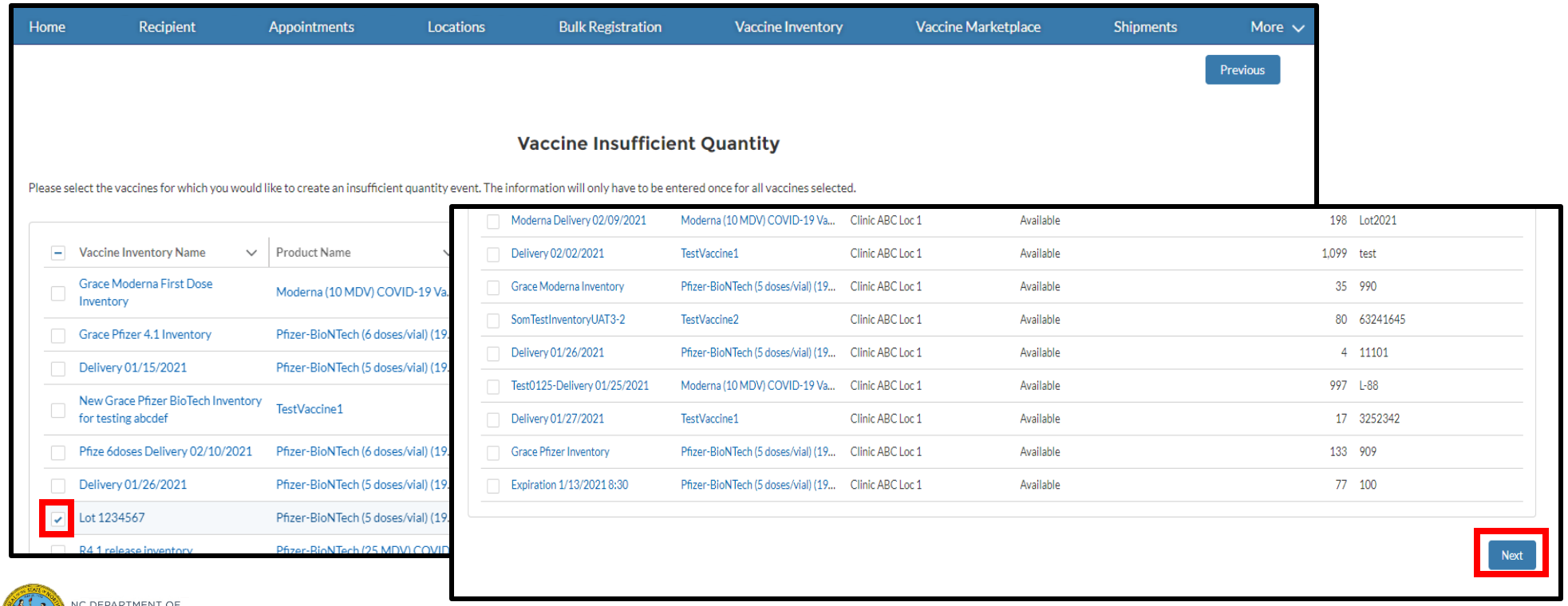
Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory hyperlink.

Step 3 of 5: Find the appropriate vaccine(s) on the list

Once you are directed to the **VACCINE INSUFFICIENT QUANTITY** page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report an insufficient quantity.

1. Check the **BOX** for the appropriate **VACCINE INVENTORIES**
2. Click **NEXT** at the bottom of the page
3. After clicking **NEXT**, you will see the **VACCINE INSUFFICIENT QUANTITY SURVEY FORM**



Audience

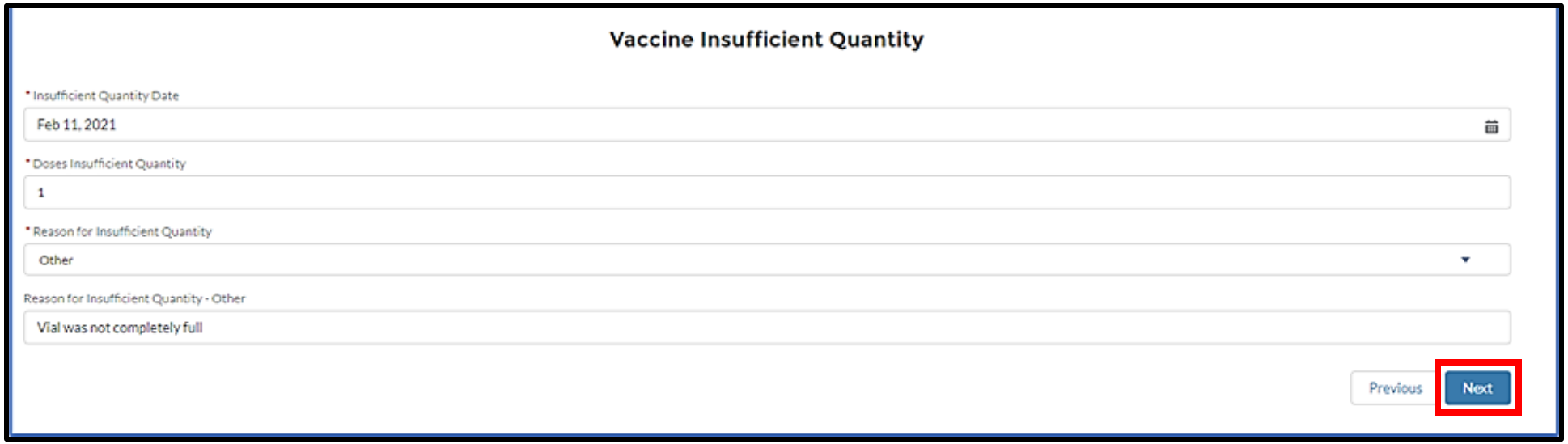
Healthcare Location Manager

Tips

You will only be able to record insufficient quantity events for the same vaccine product if you choose to select more than one Vaccine Inventory Record.

Step 4 of 5: Complete the Vaccine Insufficient Quantity Survey form

1. Populate the required **REPORT INSUFFICIENT QUANTITY FIELDS:**
    1. Insufficient Quantity Date
    2. Doses Insufficient Quantity
    3. Select the appropriate reason from the drop-down
2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once you are ready to submit the form, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**



Audience

Healthcare Location Manager

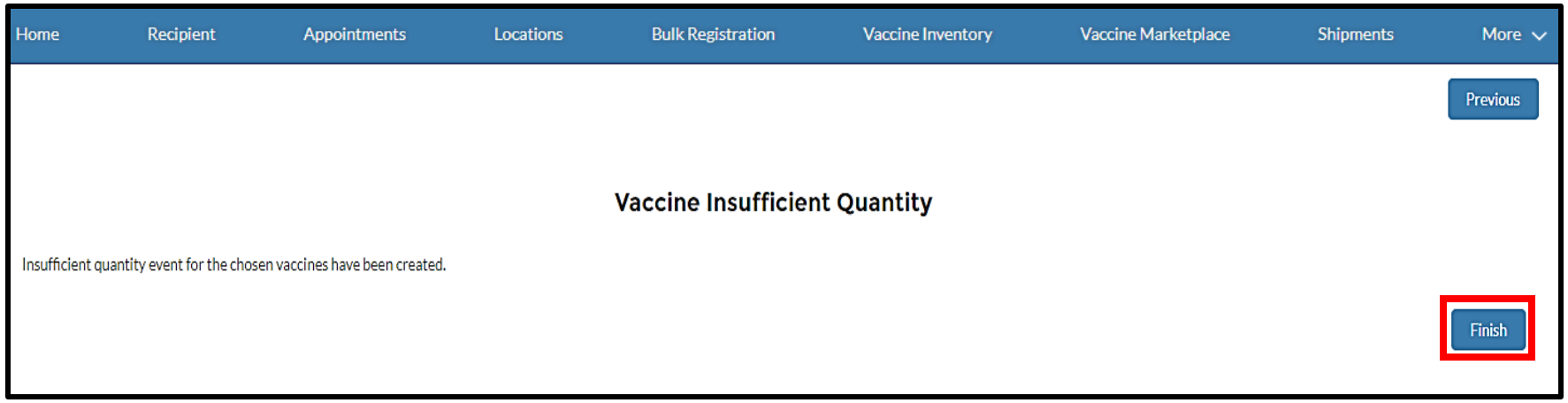
Tips

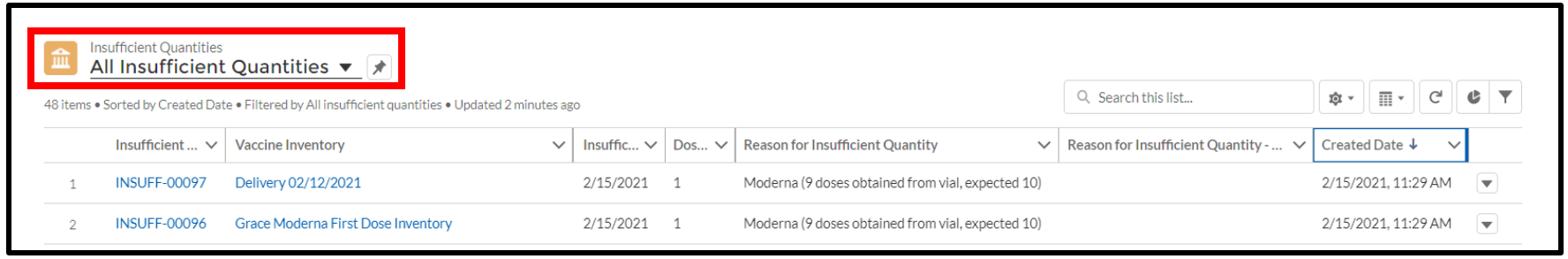
For **Doses Insufficient Quantity**, select the number of doses missing from each vial.

Step 5 of 5: Submit the Vaccine Insufficient Quantity Survey form

The **VACCINE INSUFFICIENT QUANTITY RECORD** is now submitted, and your COVID-19 Vaccine Inventory Records will be automatically updated.

1. Click **FINISH**
2. After you click **FINISH**, you will see the Vaccine Insufficient Quantity record displayed on the **ALL INSUFFICIENT QUANTITIES LIST VIEW**





Audience

Healthcare Location Manager

Tips

After clicking **FINISH**, you will see your Vaccine Insufficient Quantity record displayed on the **All Insufficient Quantities List View.**

Appendix

Key Terms

Wastage	Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.
Transfer	Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).
Spoilage	Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.
Vaccine Deprecation	Vaccine Deprecation represents the process in which the number of COVID-19 vaccines is reduced by the number of COVID-19 vaccines administrated, wasted, or considered insufficient.
Vaccine Inventory Shipment Details	Vaccine Inventory Shipment Details may include manufacturer name, lot number, serial number, and National Drug Code (NDC).
Redistribution	Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.
Insufficient Quantity	COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type are able to be administered to recipients.

Additional Notes

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.
- Previous Next Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
- Pause 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.

Supported Web Browsers:

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

User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/21/2020	• Initial document		Azalea Troche
2	1/10/2021	• Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Hep Desk Portal information	1, 2, 7, 11, 15, 21, 34	Courtney Seward
3	1/13/2021	• Added a new screenshot of the new redistribution/transfer form and took out the TIP in slide 21. The CVMS Help Desk Portal screenshot was also added.	1, 21, 22	Courtney Seward
4	1/17/2021	• Updated navigation bar. • Updated the terms for Redistribution and Transfer	6	Azalea Troche & Courtney Seward
5	1/21/2021	• Added a TIP	21	Courtney Seward & Linda Wade
6	1/27/2021	• Updated Navigation Bar screen shots to show reports tab	5,9,10,11,13,15,16,17,19, 23,25,26,28,29,31,32,33,34	Kristin Clark
7	2/4/2021	• Updated CVMS Help Desk Portal Screenshot	21,22	Courtney Seward
8	2/15/2021	• Added Insufficient Quantity Definitions • Added Insufficient Quantity Section • Rewrote Inventory Transfer to match 4.1 Release methodology • Updated screenshots to match new branding	6, 7, 14-19, 25-38	Tabitha McKelvy Steve DiGangi Nicholas Rinz
9	3/2/2021	• Updated wording for Jansen Vaccine	9, 15	Nicholas M. Rinz
10	3/10/2021	• Updated screenshots	All	Nicholas M. Rinz
11	04/26/2021	• Updated screenshot to include “Location” menu • Added tip to do separate transfers for 1st and 2nd doses; 2nd dose should follow in approximately 3 weeks • Updated Step 7 to include 1st or 2nd dose to reason; updated screenshot to show example • Added continuation slide for Change Log	22, 23, 24, 42	Darrell Lee
12	05/14/2021	• Removed references to 1st and 2nd dose tagging	23, 24	Darrell Lee

User Guide Change Log (continued)

Version	Date of Change	Changes Made	Impacted Slides	Author
13	06/11/2021	• Added Vaccine Marketplace to overview • Updated screenshots to include Vaccine Marketplace tab • Added Vaccine Marketplace Instructions	• 5 • 34 - 68 • 6 – 33	Darrell Lee