North Carolina COVID-19 Vaccine Management System (CVMS)
Provider Portal

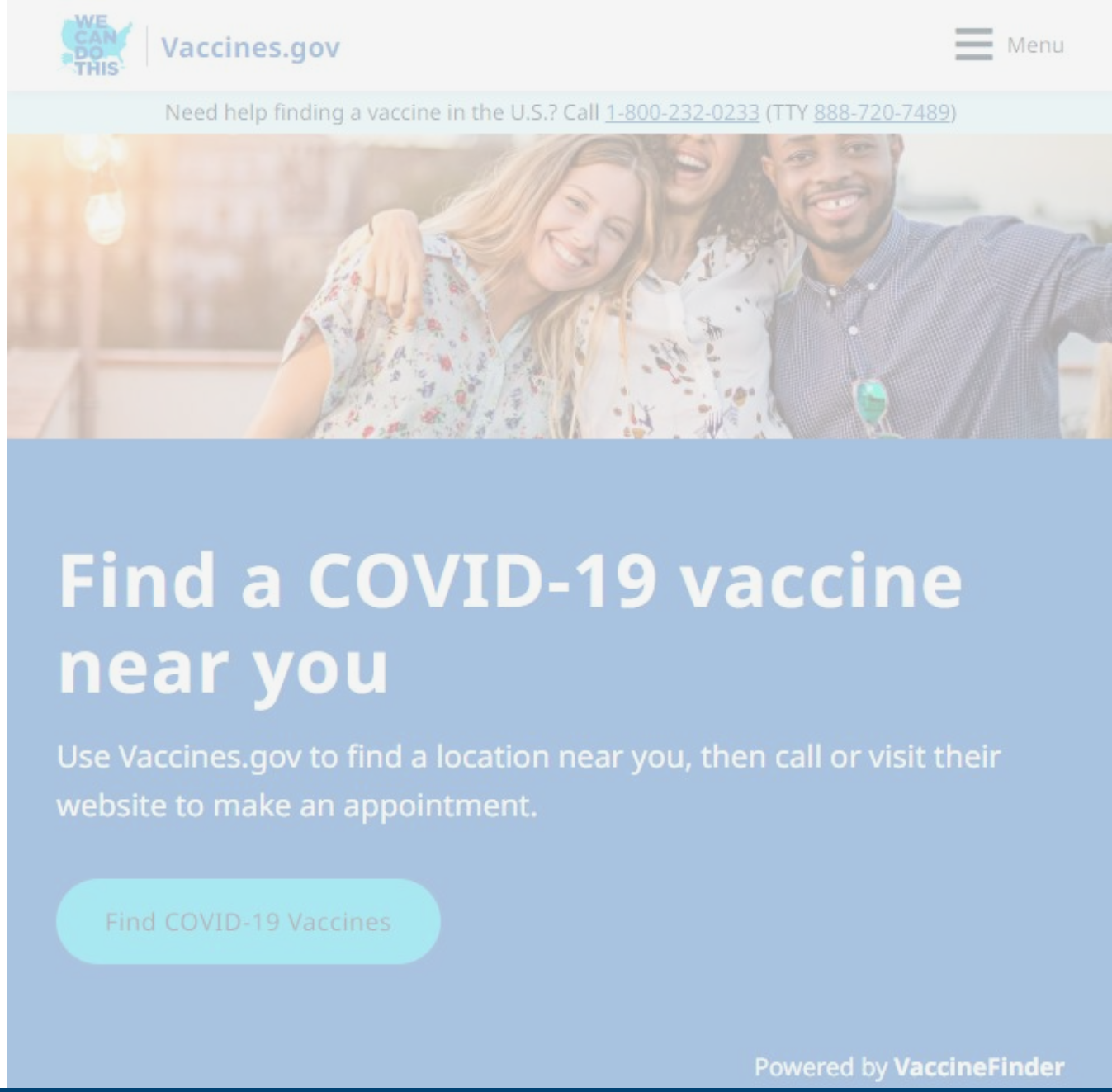
Step 7 - Add locations to the find a vaccine location website

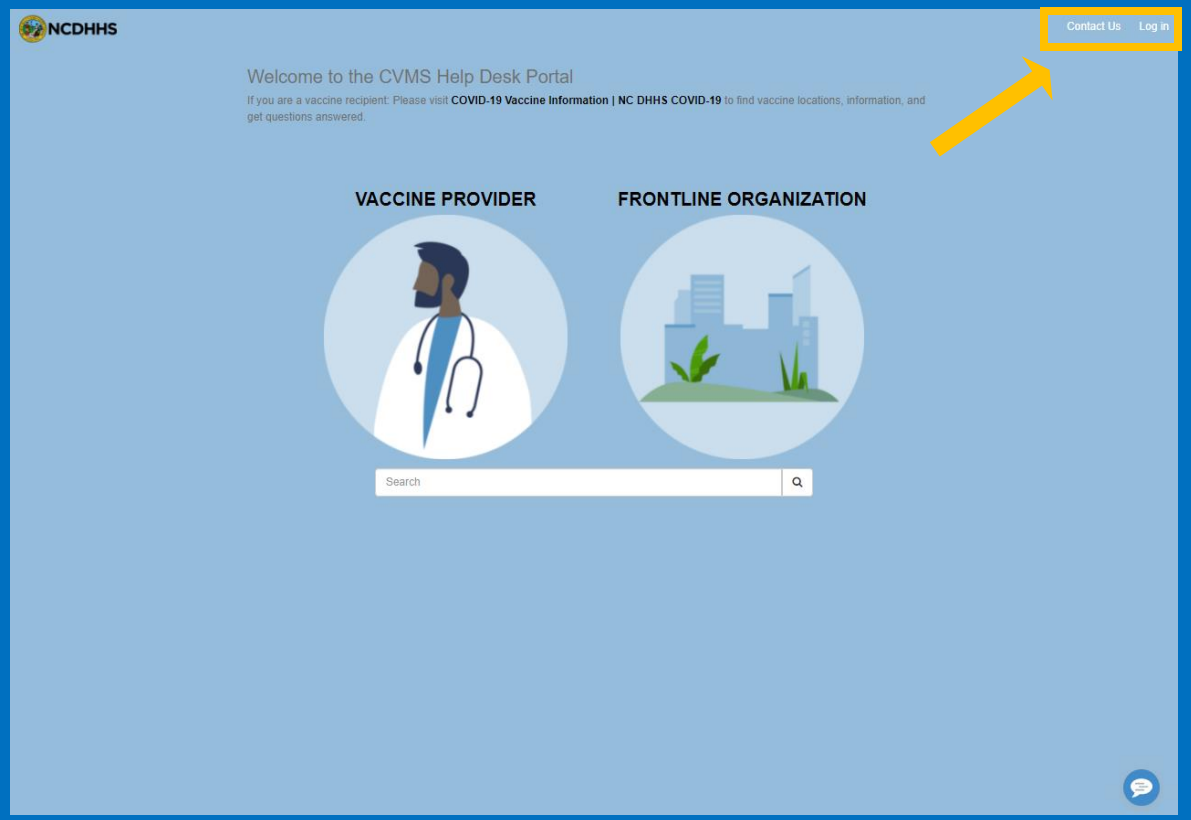
User Guide

Version 9

August 26, 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 Desk at **(877) 873-6247** and select option 1. The COVID-19 Vaccine Provider Help Desk is available during the following hours:

Monday to Friday: 7 am – 7 pm ET
Saturday & Sunday: 8 am – 4 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 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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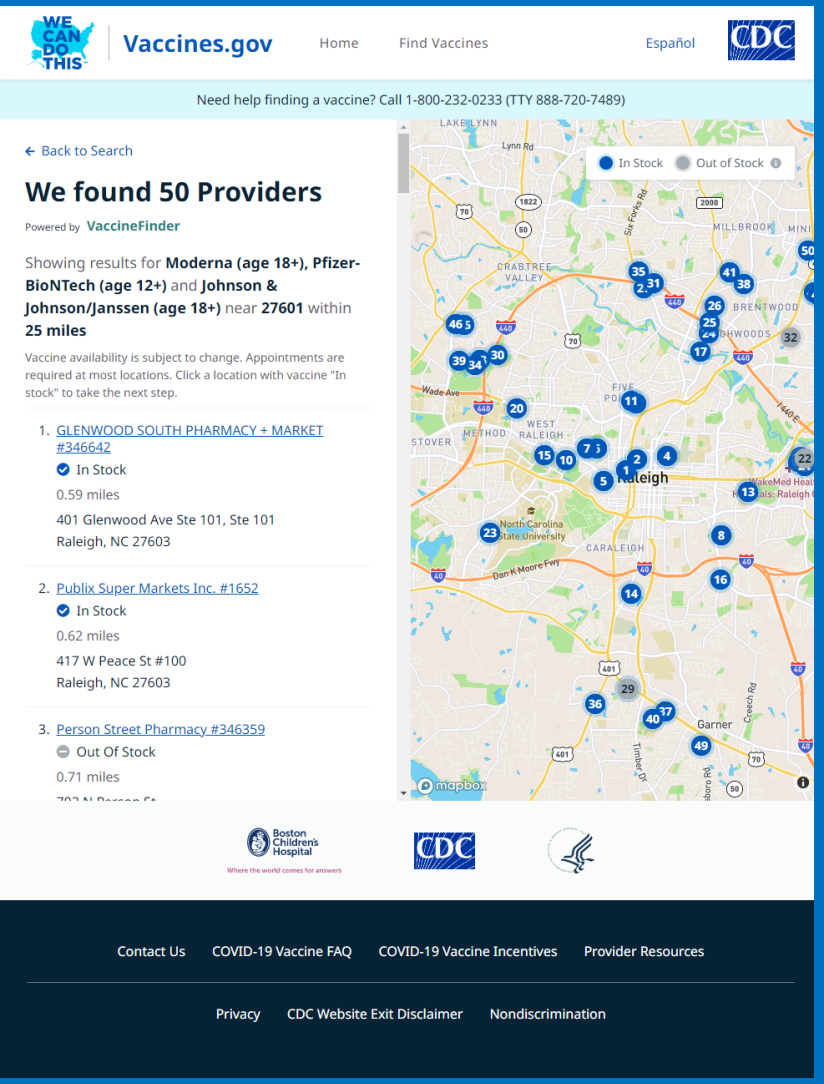
Overview



This user guide will explain how to:

- **Edit a location's information on the Vaccine Site Locator website**
- **Add a location to the website**
- **Remove a location**

The CDC's Vaccine Site Locator website (**https://vaccines.gov**) helps recipients find COVID-19 vaccine providers close to them.

It displays COVID-19 providers' locations and their websites and/or phone numbers where eligible recipients can schedule an appointment to receive a COVID-19 vaccine.

ALL providers that are receiving dose allocations and are taking appointments or walk-ins should be displayed on the Vaccine Site Locator website.

The only providers that receive allocations that should not be on the Vaccine Site Locator website are providers who are only vaccinating their own patient population (e.g., long term care, correctional facilities, or primary care providers only vaccinating their own patients)

Edit Location Details Displayed on the Vaccine Site Locator Website

Step 1 of 14: Log in to the CVMS Provider Portal

This user guide is for users with the **Healthcare Location Manager profile only**.

1. Log into the CVMS Provider Portal at https://covid-vaccine-provider-portal.ncdhhs.gov
2. Enter your NCID username and password

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Healthcare Location Manager

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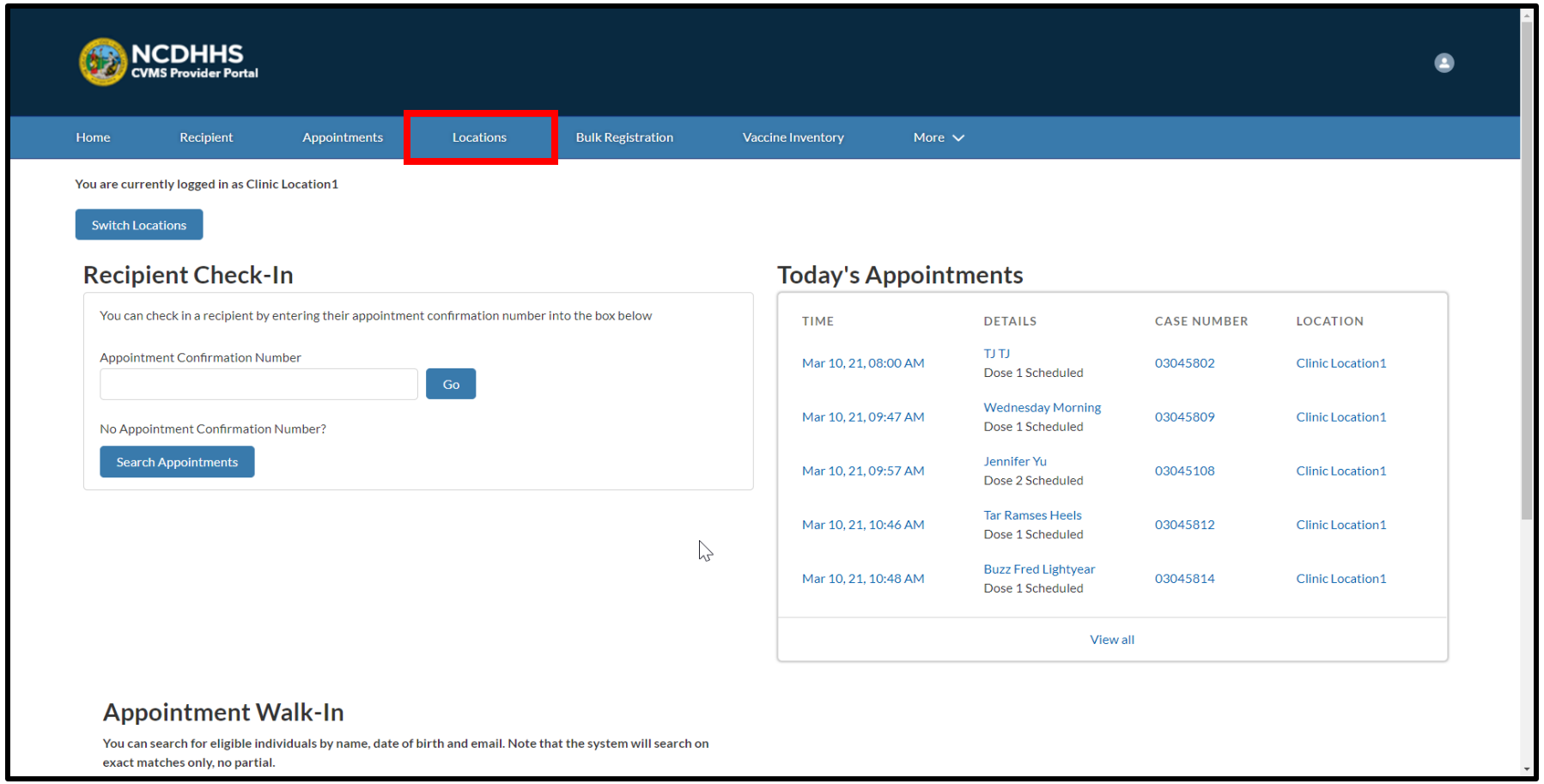
Step 2 of 14: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab



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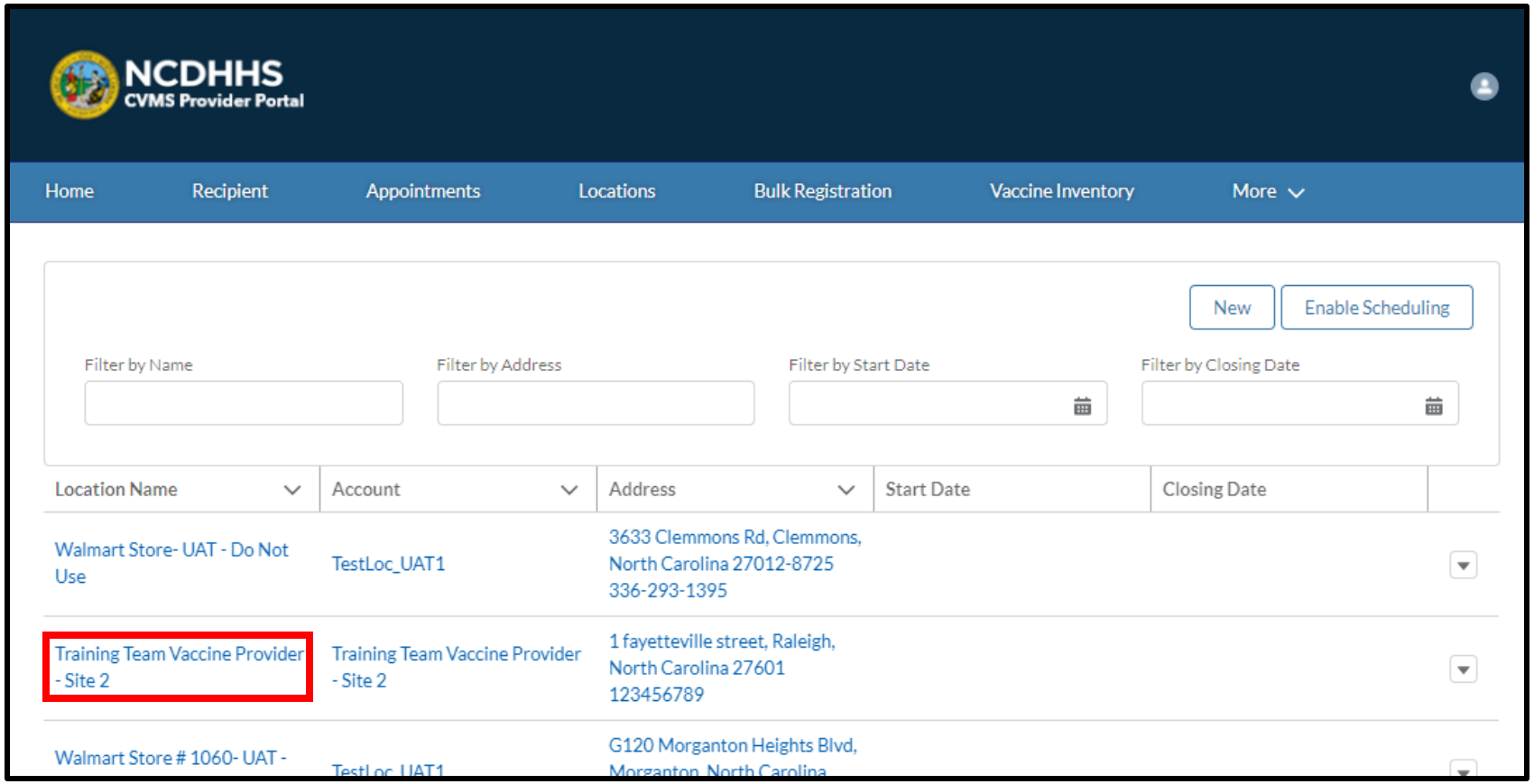
Step 3 of 14: Select the Specific Location

1. Click on the **LOCATION NAME** you wish to edit



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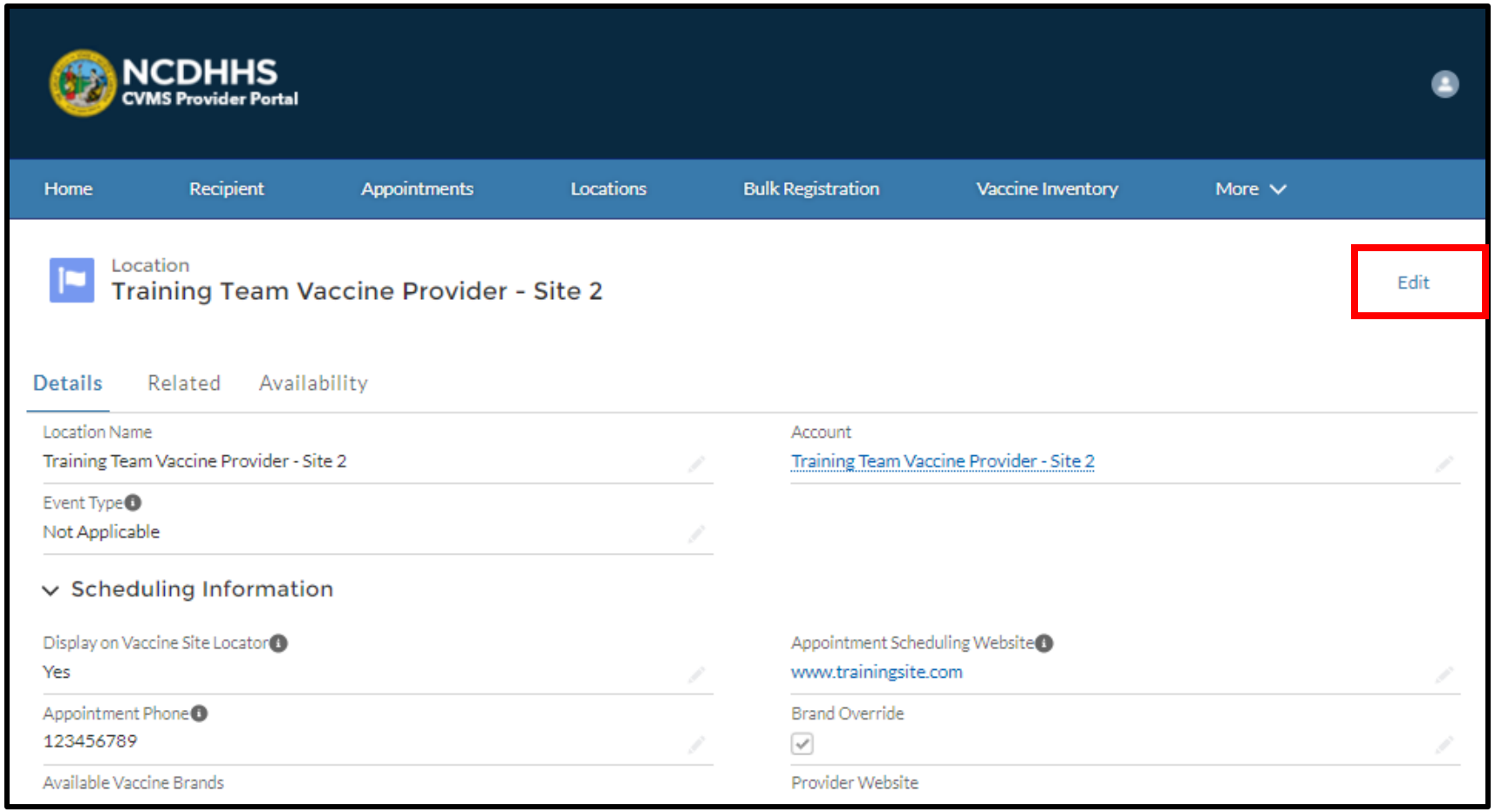
Step 4 of 14: Edit your Location Record

1. Click **EDIT**



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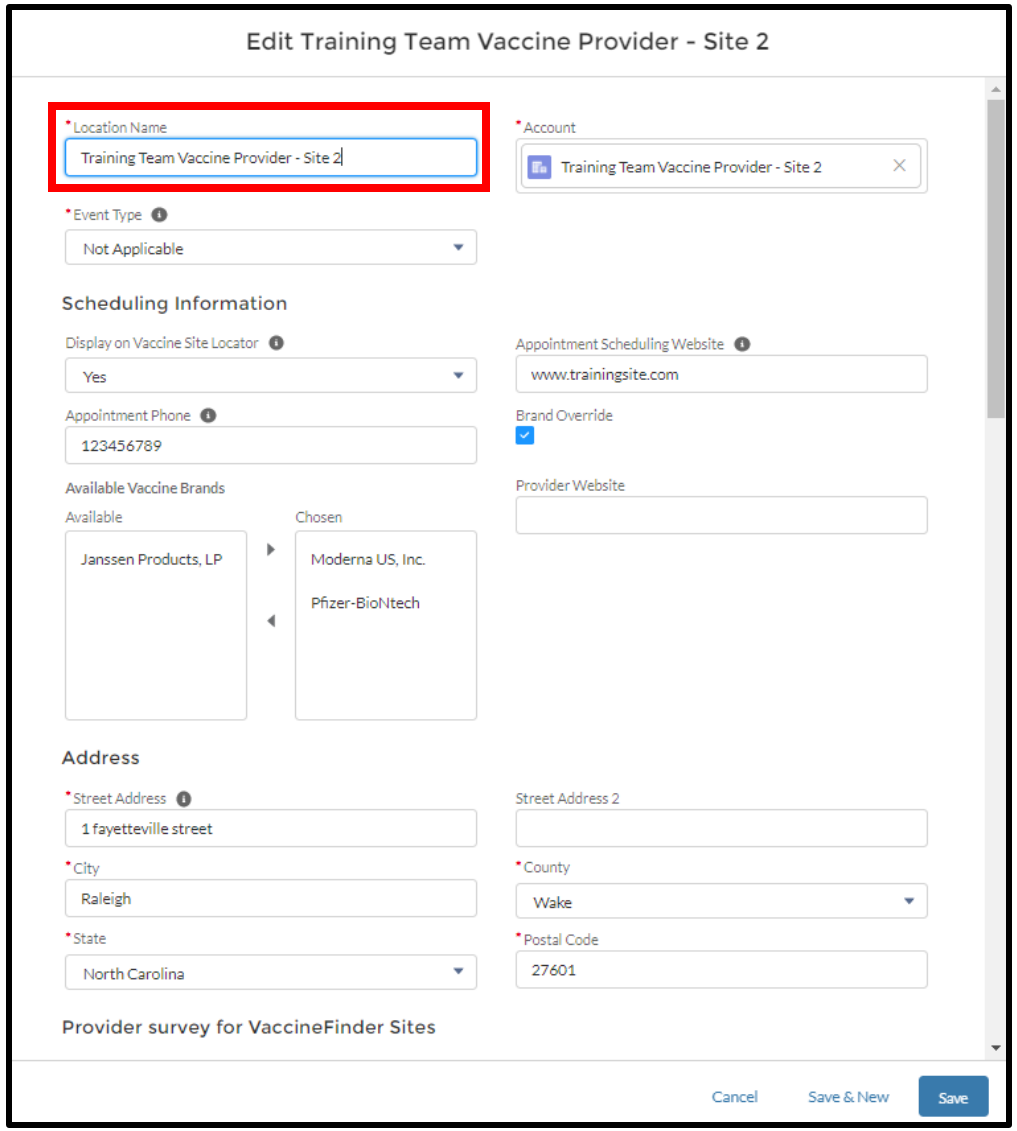
Step 5 of 14: Change Location Name



1. Edit **LOCATION NAME** to change the name that displays on the Vaccine Site Locator website

   Note: Create a new location instead of editing an existing location if this is a different vaccination location.

   Do not change the Event Type if it is Not Applicable.

2. Click **SAVE**

Audience

Healthcare Location Manager

Tips

The **LOCATION NAME** field will have to be less than 80 characters.

CLICK SAVE to save any changes.

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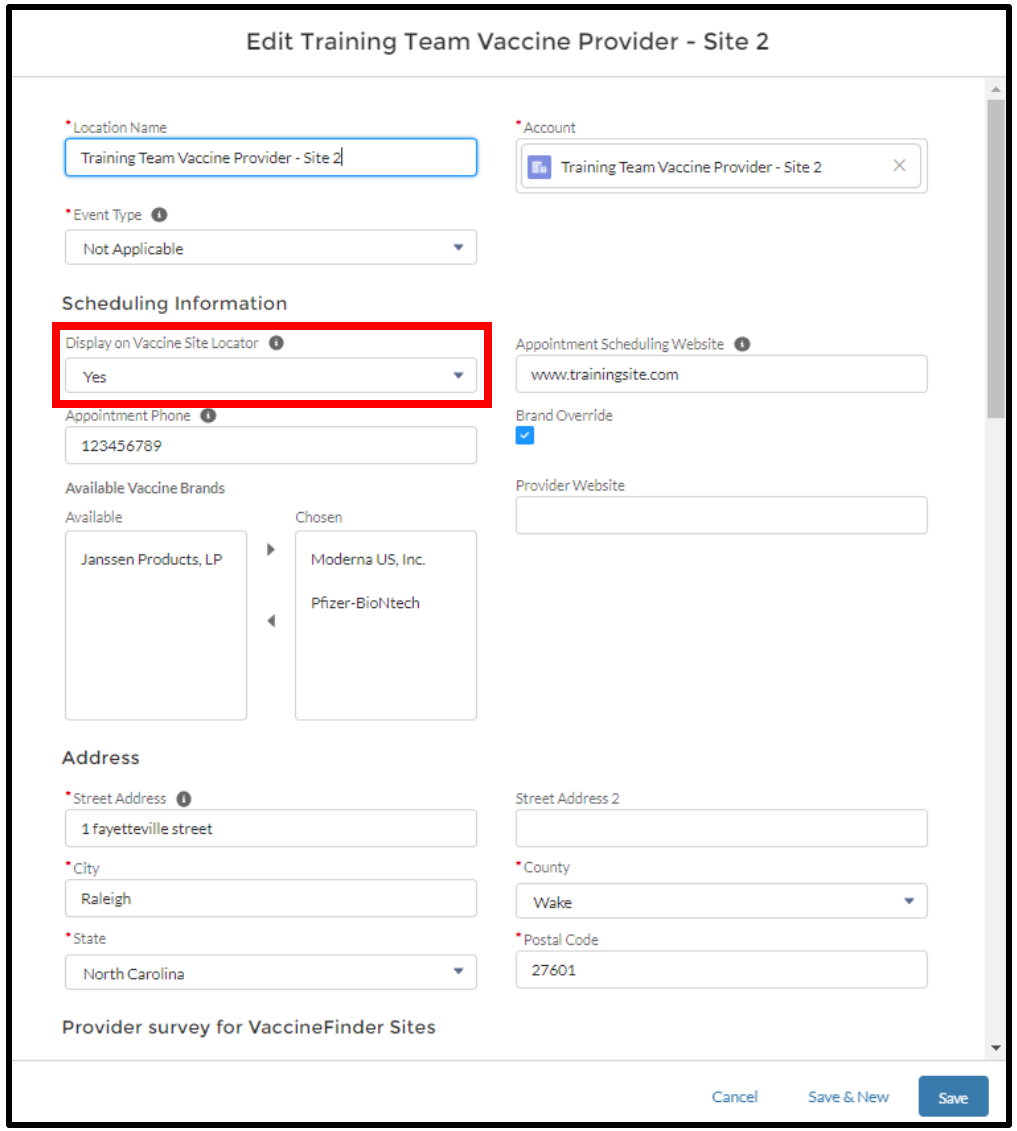
Step 6 of 14: ADD or REMOVE a Location from the Vaccine Site Locator Website



1. Select Yes to **DISPLAY ON VACCINE SITE LOCATOR** to *add* your site to the Vaccine Site Locator website
   - This should be checked if your location provides COVID-19 vaccines to the general public.
2. Select No to **DISPLAY ON VACCINE SITE LOCATOR** to *remove* your site from the Vaccine Site Locator website
3. Click **SAVE**

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Tips

Only select No to **DISPLAY ON VACCINE SITE LOCATOR** if your location is a correctional facility, long-term care facility, or a location that is providing COVID-19 vaccines within a restricted group of recipients.

CLICK SAVE to save any changes.

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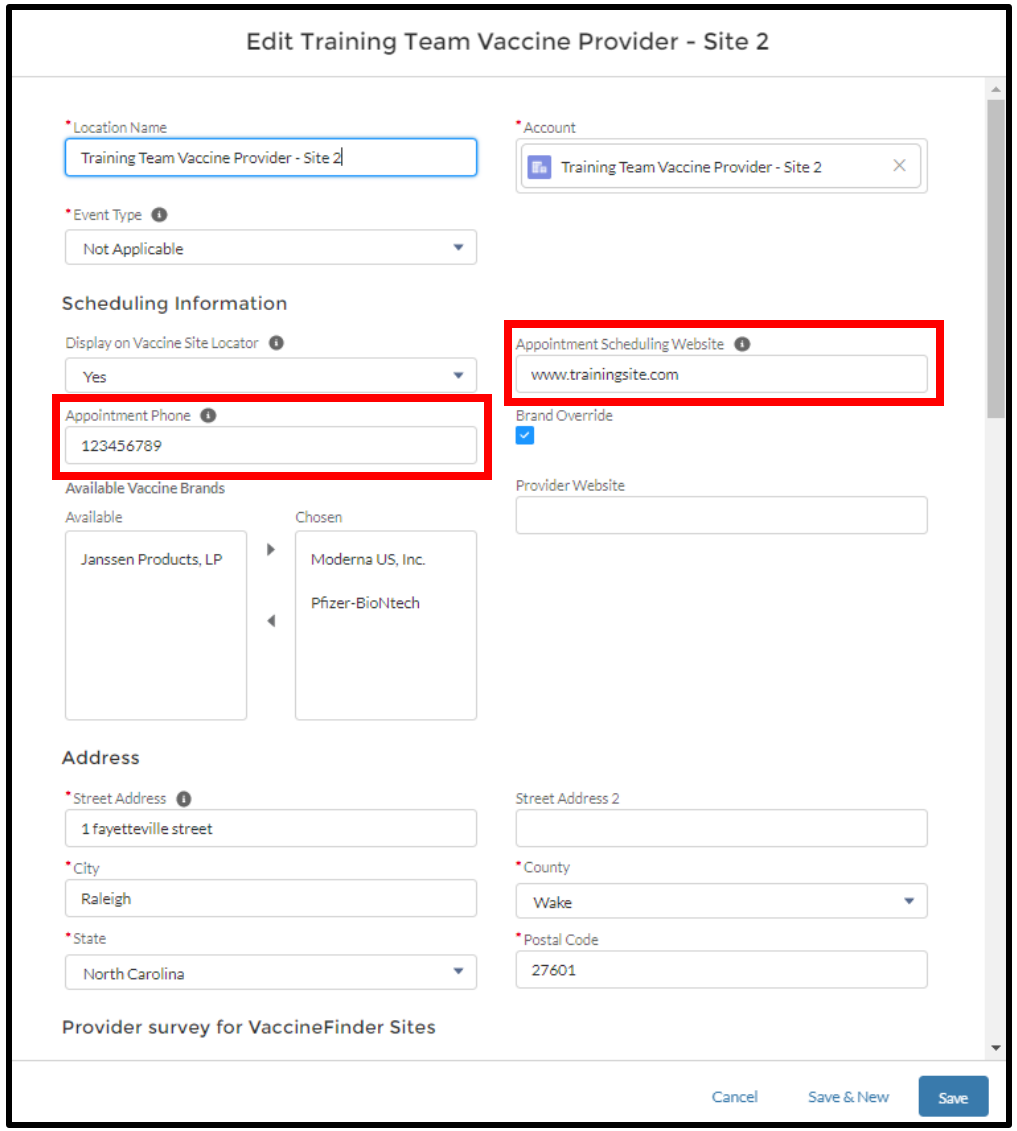
Step 7 of 14: Change Scheduling Phone Number and Website



1. Enter the **APPOINTMENT SCHEDULING WEBSITE** link to your location's website
   - You should enter the address for the website where people can book appointments
2. Enter **APPOINTMENT PHONE NUMBER** (optional if NOT using scheduling feature in CVMS)
   - This should be a public phone number that people can call for appointments or information
   - This is required if the location is using the scheduling feature in CVMS
3. Click **SAVE**

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Healthcare Location Manager

Tips

If both **CVMS Scheduling** is checked and **Display on Vaccine Site Locator** is Yes, you are required to provide a phone number or a site URL.

If you have not enabled the scheduling feature in CVMS (e.g., do not check CVMS Scheduling) and **only select Yes to Display on Vaccine Site Locator**, only a website URL is required.

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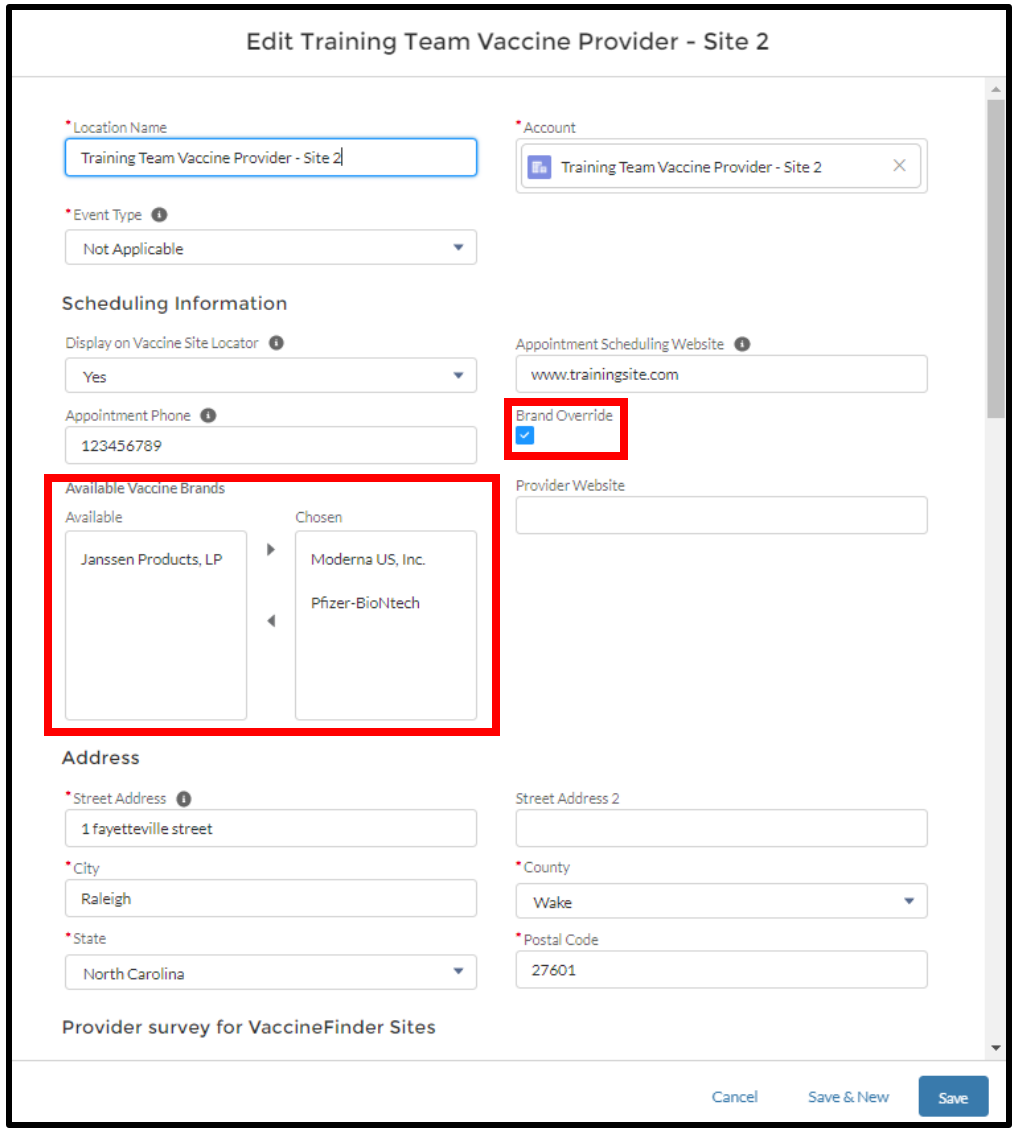
Step 8 of 14: Identify Vaccine Brands Your Scheduling Location Is Administering (optional)



For primary locations, **<u>CVMS will automatically select all vaccine brands for which you have inventory available</u>**. CVMS will review and update inventory on the Vaccine Site Locator website daily at 5:00 AM and 5:00 PM so that it is in sync with the inventory available for this location.

If you prefer to **MANUALLY** manage the vaccine brands recipients will see, you can follow the instructions below:

1. Select the **BRAND OVERRIDE** checkbox
2. **EDIT** the **AVAILABLE VACCINE BRAND** field pick-list by using the left facing arrow to **DE-SELECT** the vaccine brands that will NOT be administered at your location
3. Continue with any other edits to your location and **SAVE**

Audience

Healthcare Location Manager

Tips

For more information on the **Brand Override** functionality, see the next slide of this user guide.

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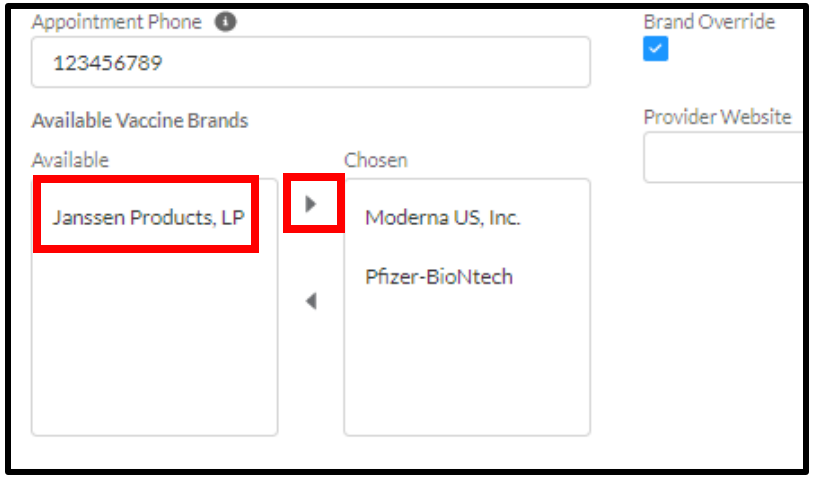
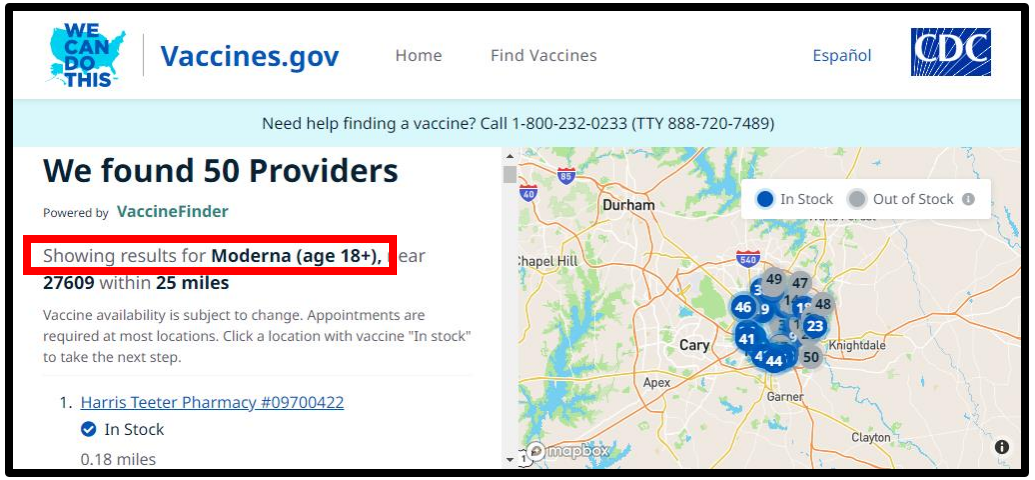
Step 9 of 14: Using the Brand Override Functionality



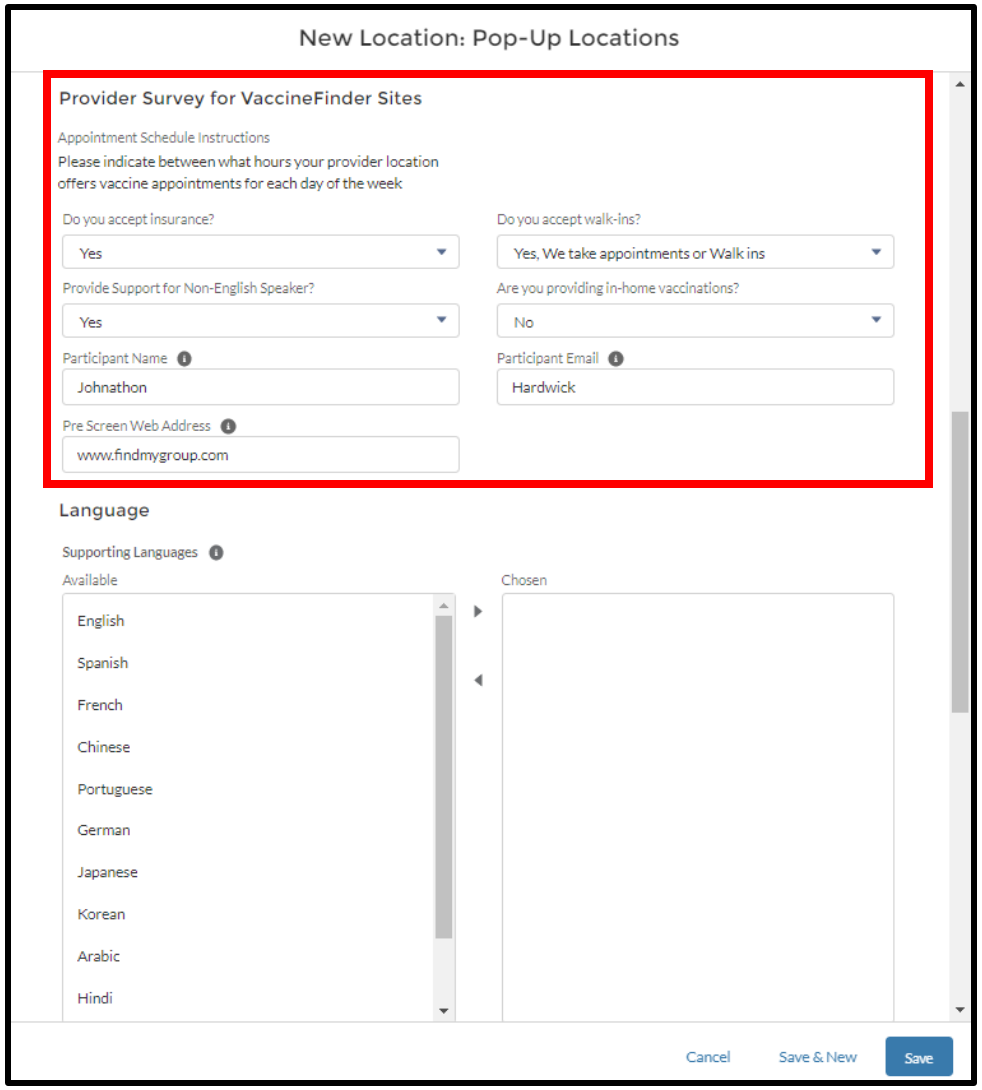
- By selecting **BRAND OVERRIDE**, you will override CVMS' automatic COVID-19 vaccine brand selection based on your location's inventory and you will be responsible for ensuring that the **CHOSEN** brand(s) reflect what is available in this location's inventory on an on-going basis.
- If you decide that you no longer wish to override CVMS' automatic COVID-19 vaccine brand selections, **DE-SELECT** Brand Override to opt-out of the override feature.
- The system will then update your COVID-19 vaccine brands to align with the location's inventory daily at 5:00 AM and 5:00 PM.



Vaccine Site Locator Website - Recipient View:

When a vaccine brand is de-selected from the **CHOSEN** list, the location will not appear on the Vaccine Site Locator website when a recipient searches by the vaccine product.

Step 10 of 14: Complete Provider Survey (Optional)



Complete the **PROVIDER SURVEY** for your vaccination location to share additional information with the public (optional):

1. **Do you Accept Insurance?**
2. **Do you accept walk-ins** (or only appointments)?
3. **Provider Support for Non-English Speaker?** If the answer is Yes, select the additionally supported languages (see next slide of this user guide)
4. **Are you providing in-home vaccinations?**
5. **Participant Name and Email:** this information will not be displayed on the website, but will serve as a point of contact if there are any questions from NCDHHS
6. **PreScreen Web Address:** enter the direct link to your organization or jurisdiction's pre-screener that is required to make an appointment (if applicable <u>and different from the Appointment Scheduling Website</u>)

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Tips

Hover over the circle information icon for additional guidance on how to answer each question.

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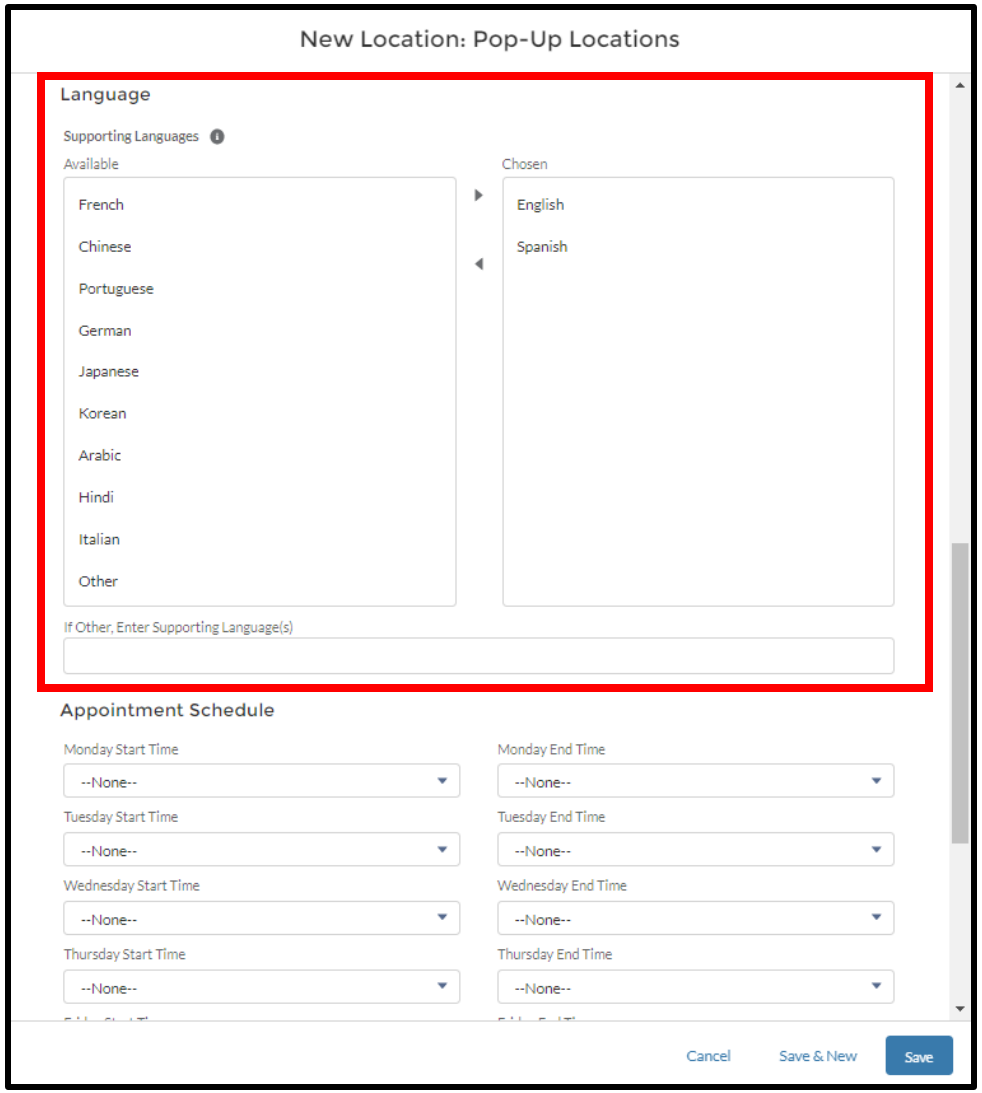
Step 11 of 14: Select the Supported Languages (Optional)



1. Select the **LANGUAGES** that you support at this location

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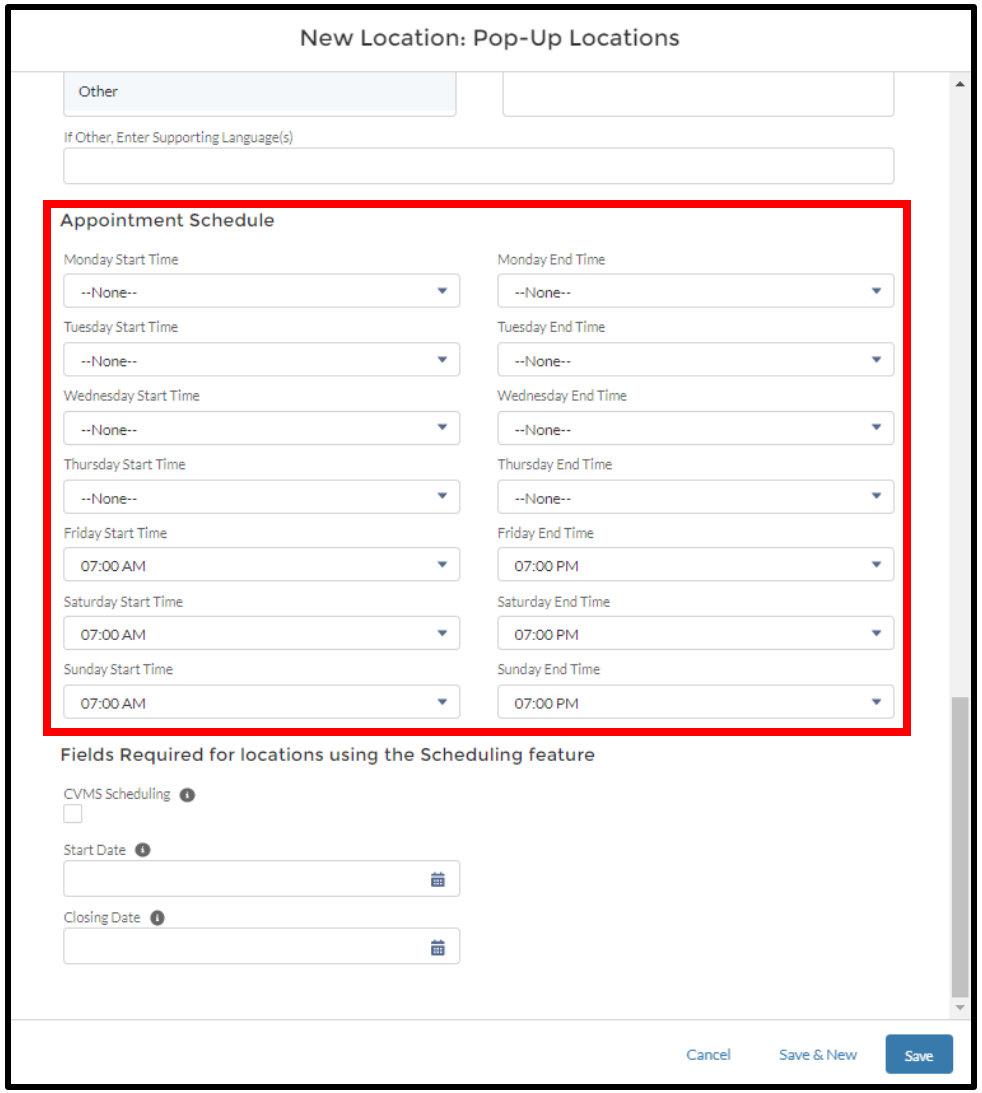
Step 12 of 14: Enter the Appointment Schedule (Optional)



1. Enter the **APPOINTMENT SCHEDULE** (opening hours during which the public can receive a vaccine at your location)

Note: If you are using the scheduling feature in CVMS, you must also create the Availability Schedule on the Availability tab of the location.

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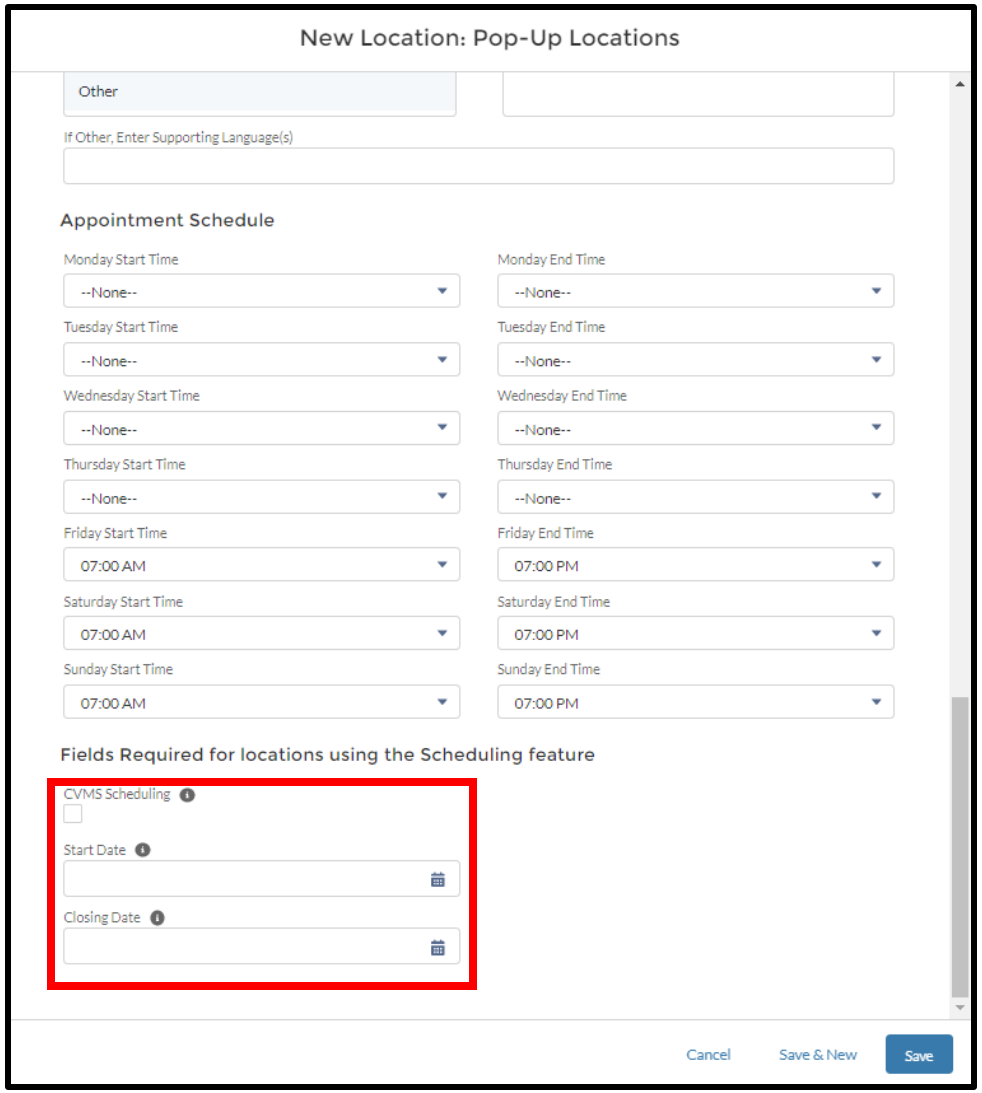
Step 13 of 14: Activate the Scheduling Feature of CVMS and Set Appointment Dates (Optional)



1. If your location will use the scheduling feature in CVMS, check the **CVMS SCHEDULING** box
2. Set the **START DATE** to be the first date for which you would like recipients to book appointments initially
3. Set the **CLOSING DATE** to be the last date for which you would like recipients to book appointments initially

Note: You can change the Start Date and Closing Date later, but recipients will be able to book appointments once the location is displayed on the Vaccine Site Locator website.

You can choose to display the location on the Vaccine Site Locator website later once you are ready for the location to be displayed.

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Healthcare Location Manager

Tips

You will be able to check the CVMS Scheduling box only after the scheduling feature is enabled for your location. See the **CVMS Provider Portal Manage Appointment Scheduling User Guide** for more information about utilizing the scheduling feature in CVMS at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-10---invite-recipients-to-self-schedule-their-appointments-optional.

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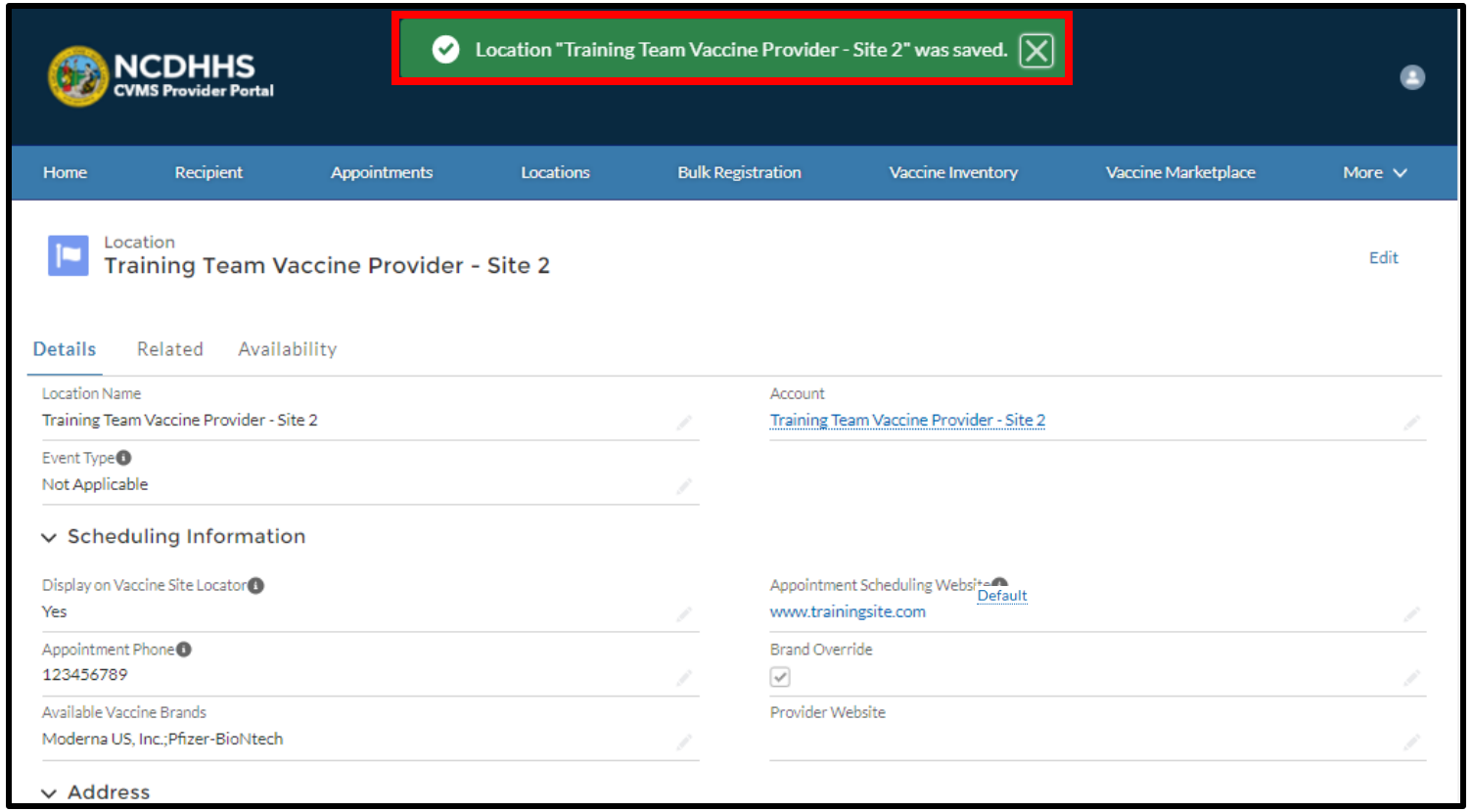
Step 14 of 14: Receive Confirmation of Changes

Once you are done editing, and have **clicked SAVE** to save the changes, a success notification will appear at the top of the screen.

It may take up to 7 business days for your changes to appear on Vaccines.gov. Contact the [CVMS Help Desk]() for assistance.



Audience

Healthcare Location Manager

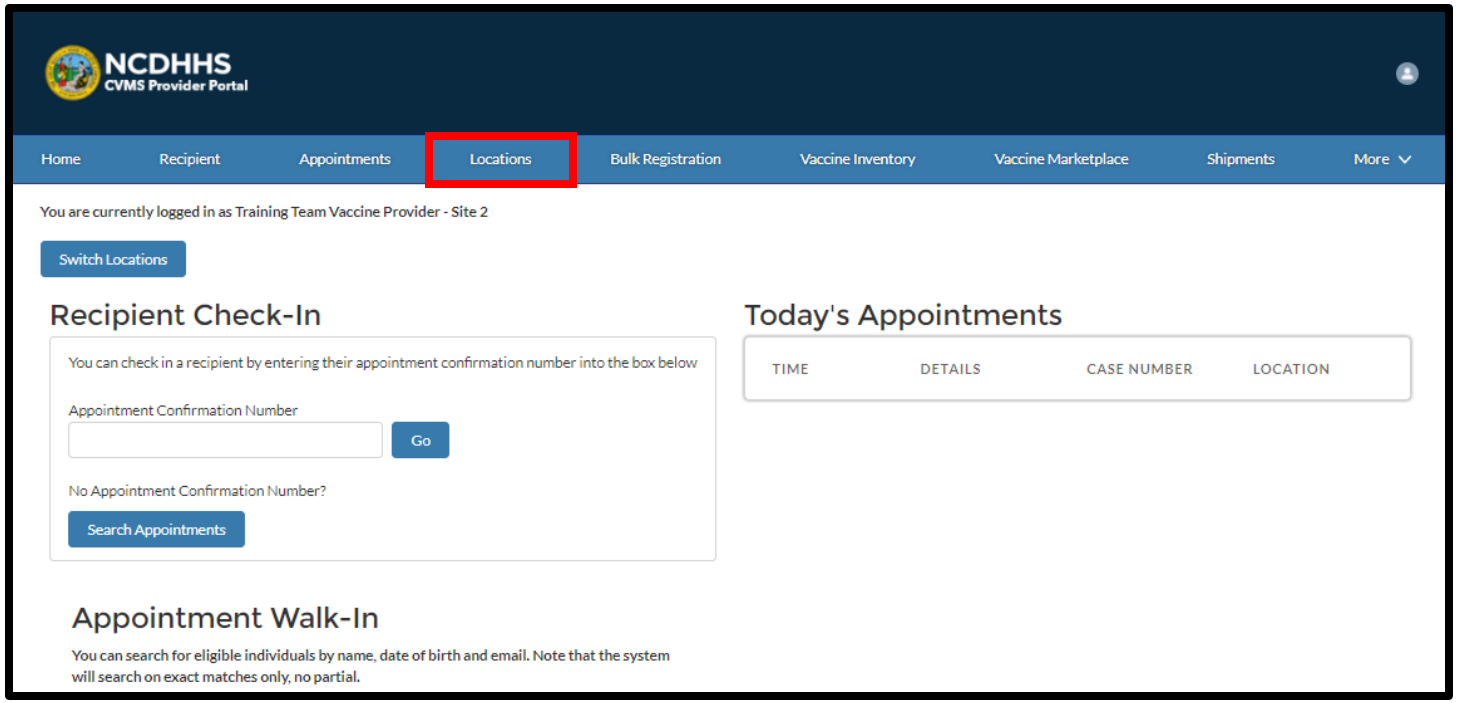
Create Community Vaccine Event Locations

Step 1 of 12: Create a New Community Vaccine Event Location

If you organize a community COVID-19 vaccine event, you must add these locations to CVMS and display them on the Vaccine Site Locator website.

It can take **up to 7 business days** for your community vaccine event to show on https://vaccines.gov. The NCDHHS will need to manually register your location with the CDC to obtain a unique identifier. Only then will your location show on the Vaccine Site Locator website.

1. To begin, click on the **LOCATIONS TAB**



Audience

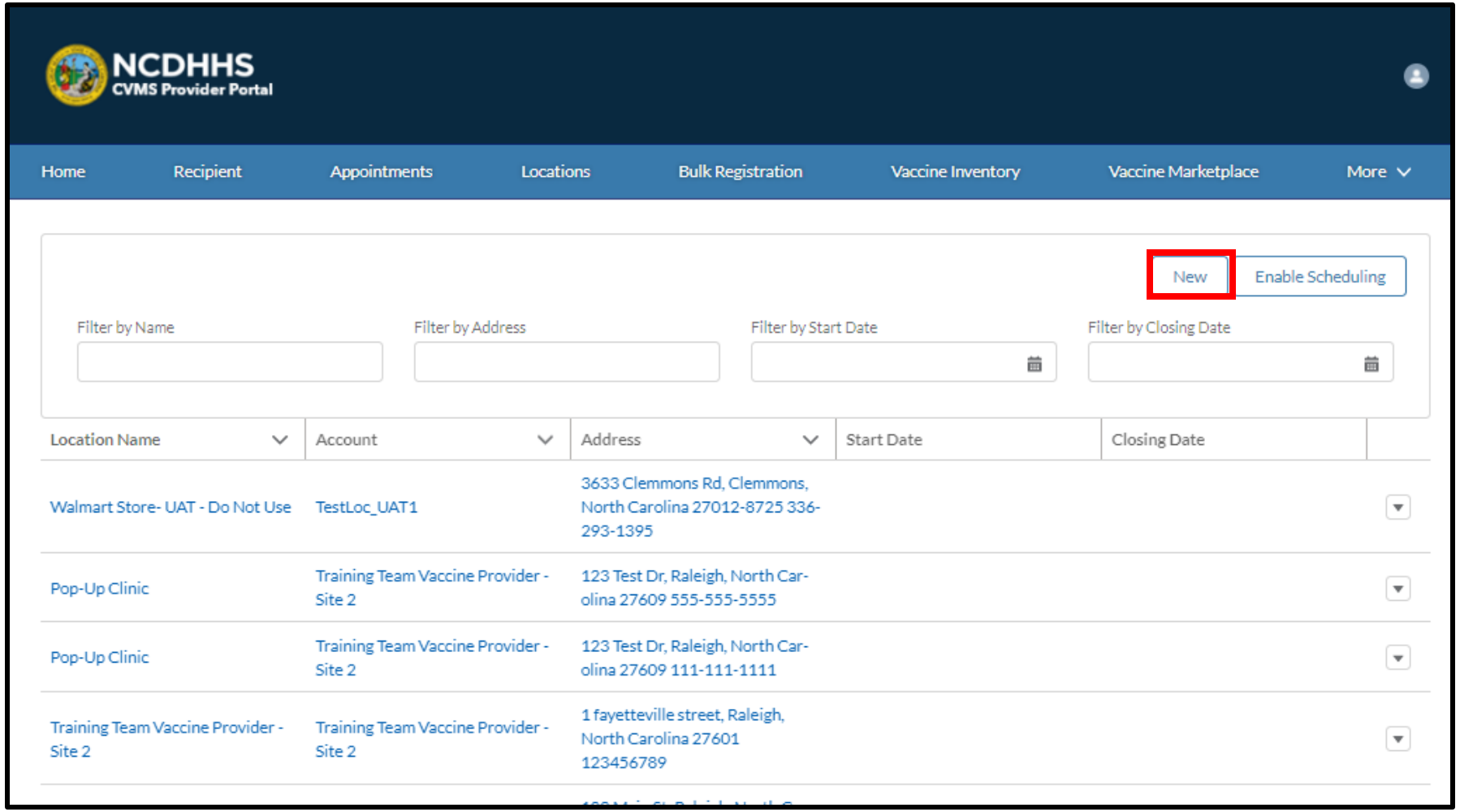
Healthcare Location Manager

Tips

Adding your vaccine event to CVMS does not impact dose allocation, or where doses are shipped to.

Step 2 of 12: Click New

1. Click the **NEW** button



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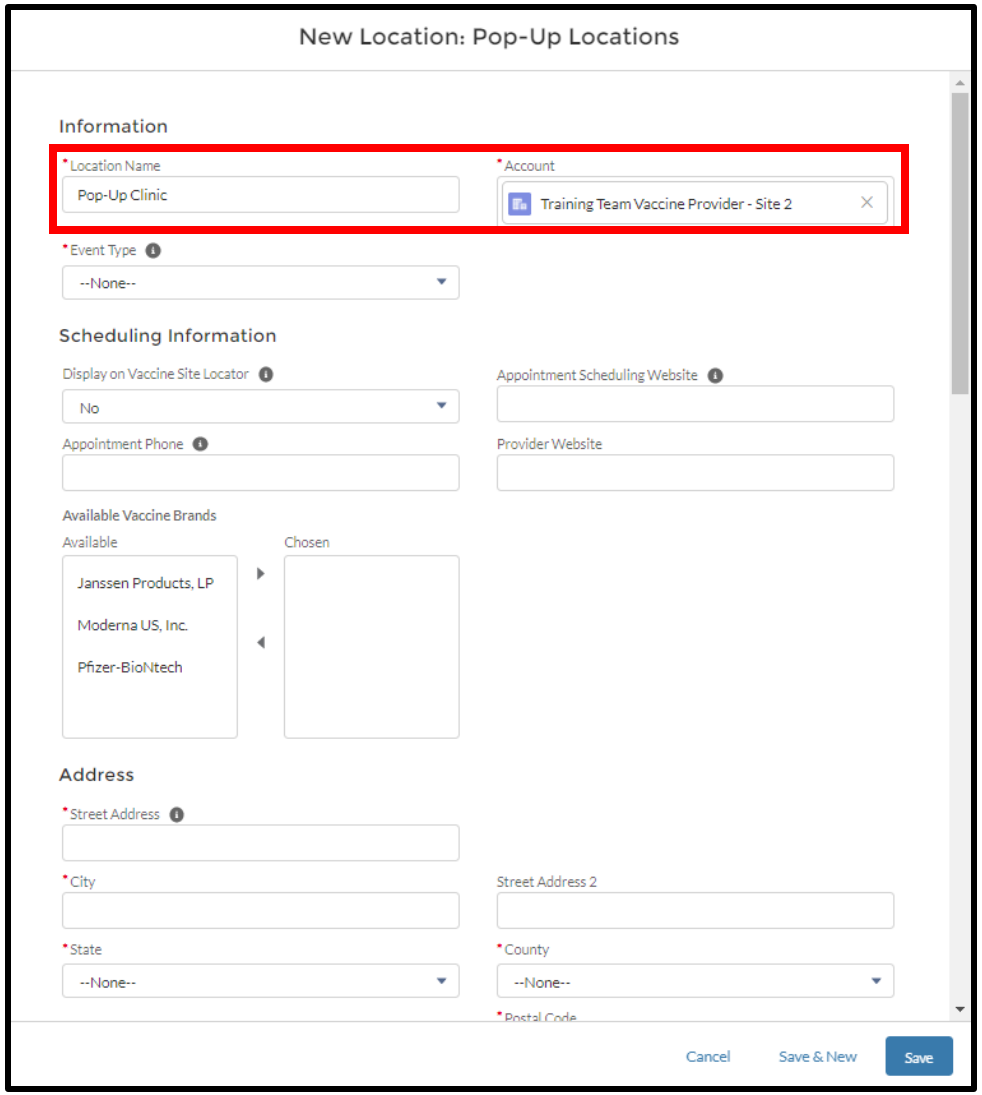
Step 3 of 12: Name Your Location



1. Enter **LOCATION NAME** (location Name must be less than 80 characters)
2. Select an **ACCOUNT**
   - Select the provider account that the event is affiliated with. If your user ID is associated with multiple providers, you can select from those providers here.

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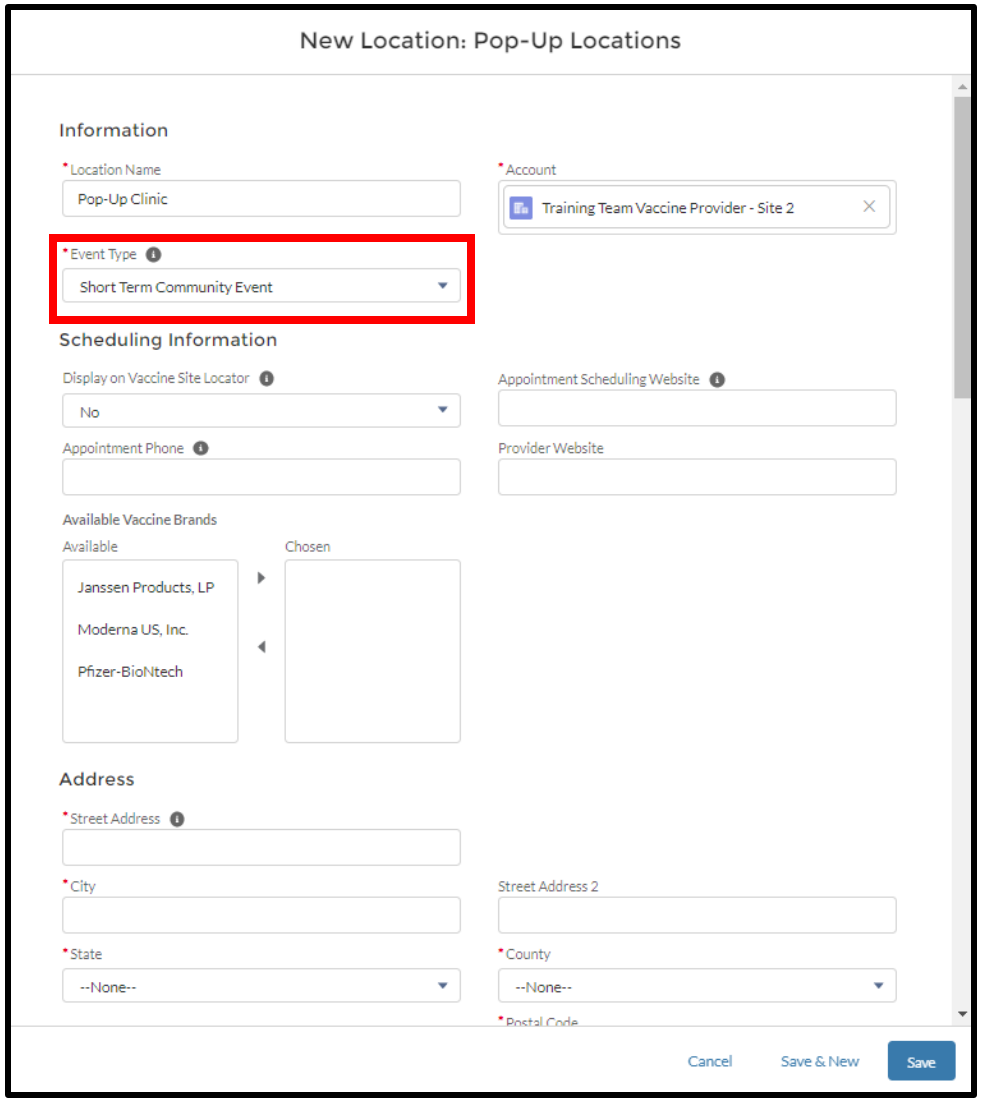
Step 4 of 12: Select Event Type



Indicate whether this location is a community vaccine event in **EVENT TYPE.**

1. Select **EVENT TYPE** from list
   - Select “Short Term Event” if the location is a pop-up event that will run for less than 3 weeks
   - Select “Long Term Event” if the location is an event that will run for 3 weeks or longer

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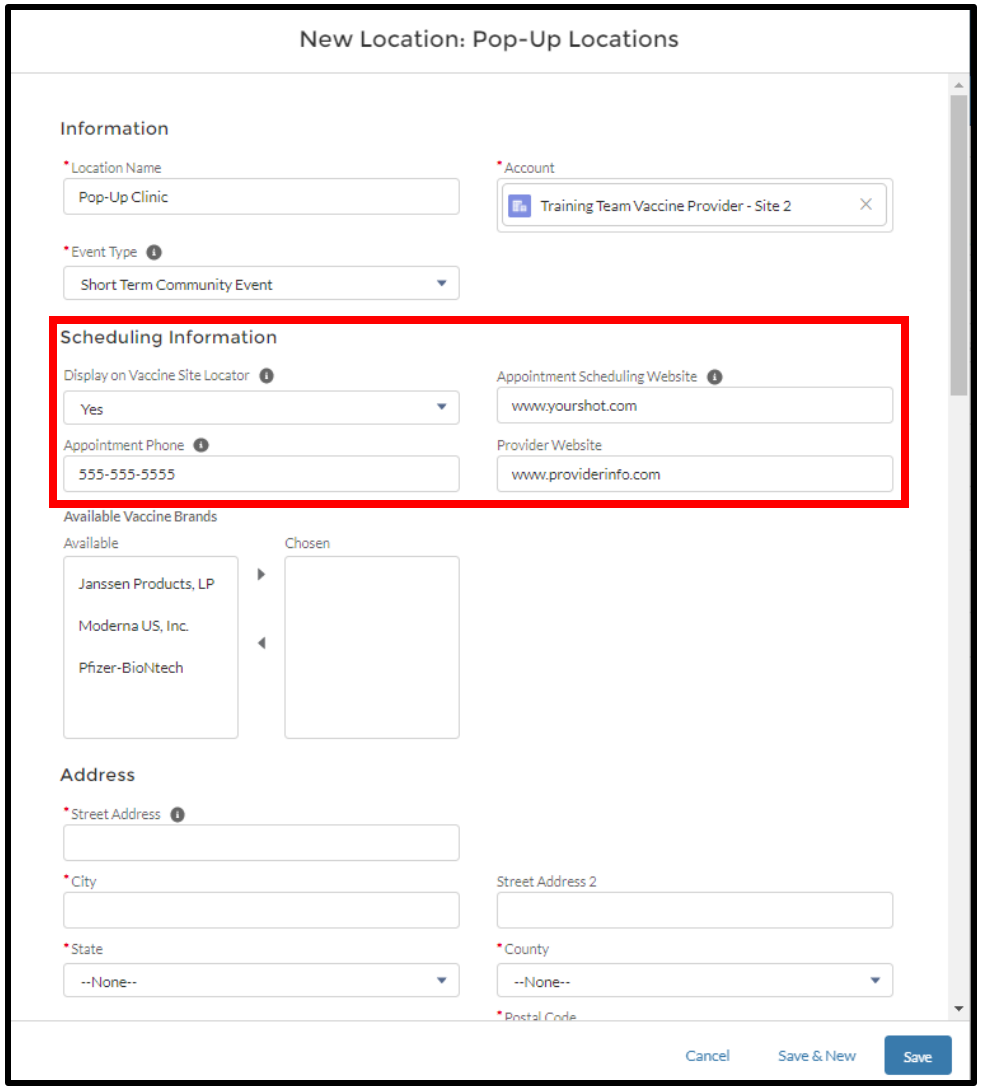
Step 5 of 12: Display your Location on the Vaccine Site Locator Website



1. Select **DISPLAY ON VACCINE SITE LOCATOR** = **YES**
   - Only select **DISPLAY ON VACCINE SITE LOCATOR = NO** if your location is a correctional facility, long-term care facility, or a location that is providing vaccines within a selected group of recipients.
2. Enter the **APPOINTMENT SCHEDULING WEBSITE** link to your location's website (required when CVMS Scheduling is unchecked)
3. Enter **APPOINTMENT PHONE NUMBER** for recipients to contact your location (must be xxx-xxx-xxxx format)
4. Enter your **PROVIDER WEBSITE** for recipients to find more information on your location

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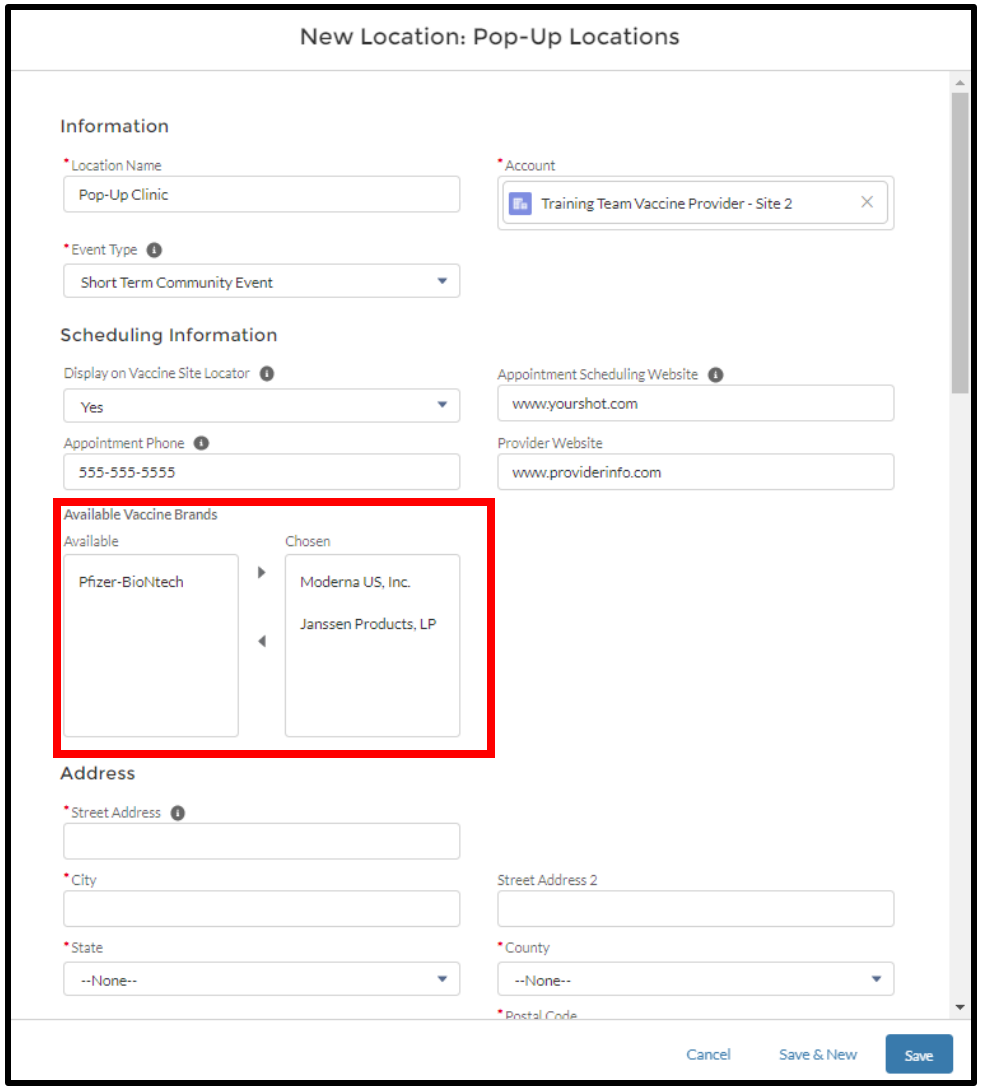
Step 6 of 12: Identify Vaccine Brands Your Scheduling Location Is Administering



1. Select products in the **AVAILABLE** vaccine brand field pick list
2. Click on the Arrow pointing to the ri ▶ to add them to the **CHOSEN** list to decide which brands recipients will see on the Vaccine Site Locator website

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Tips

For pop-up locations, the system will NOT automatically select vaccine product brands. **You will need to select all vaccine product brands to be displayed on the Vaccine Site Locator website manually**.

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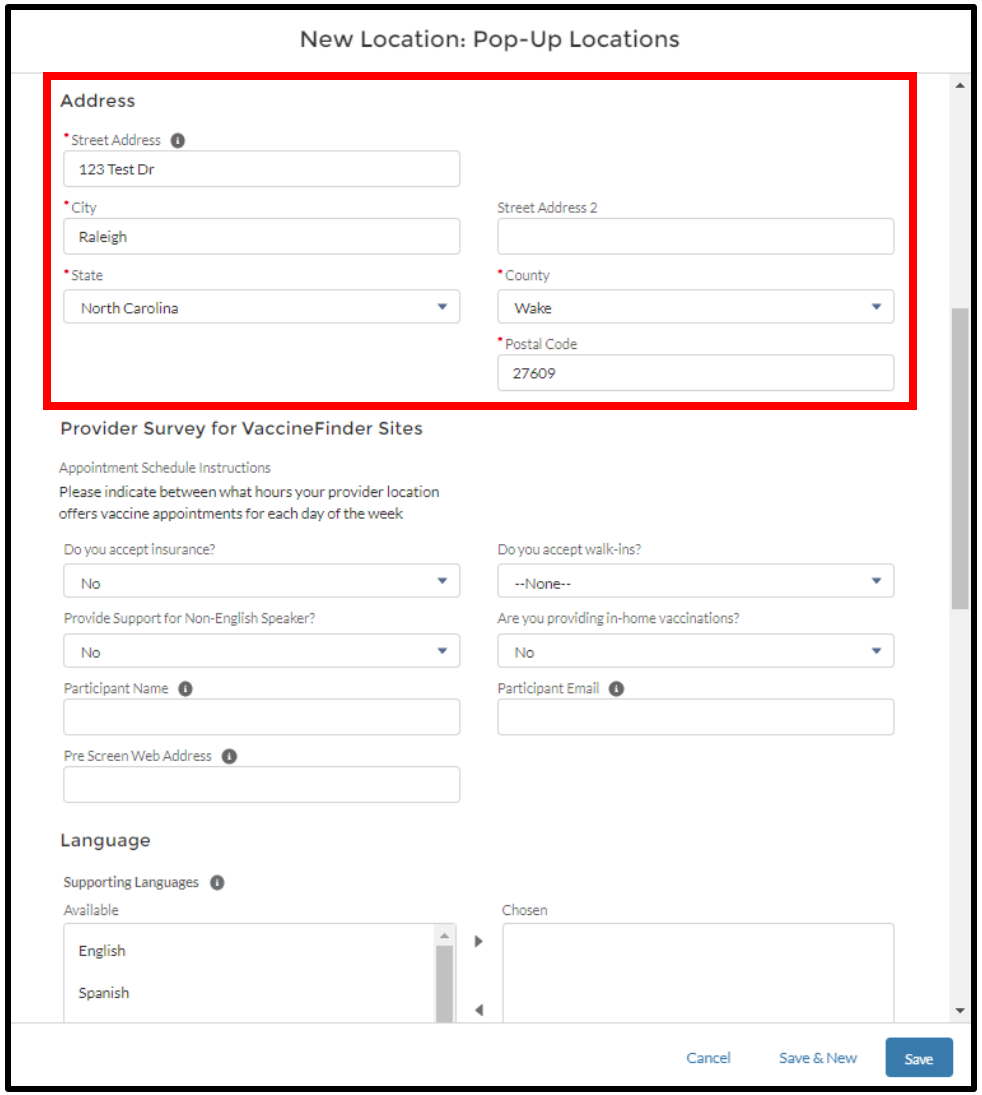
Step 7 of 12: Enter Address



1. Enter the Street Address, City, State, Postal Code, and County

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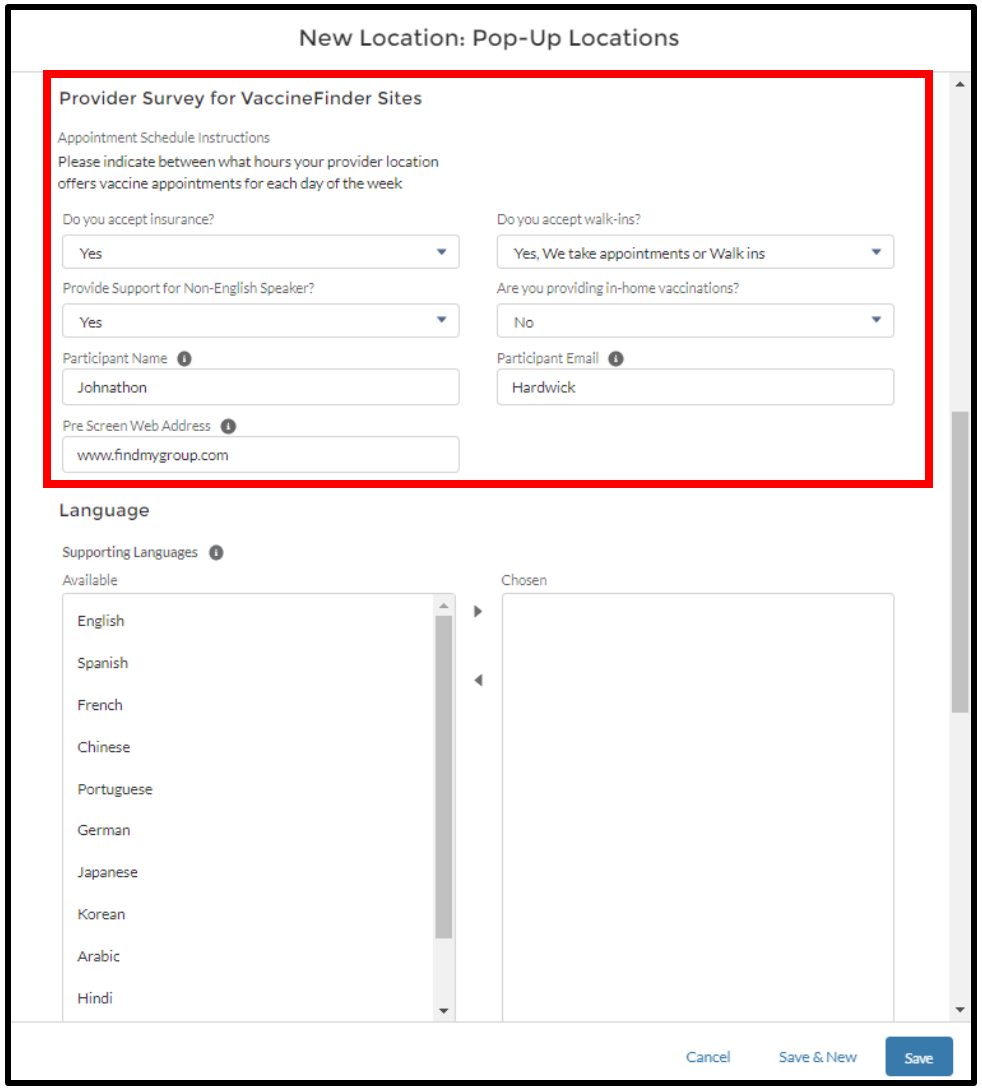
Tips

The **Address** is the location where you are vaccinating recipients; this is the address that will be displayed on the Vaccine Site Locator website (please do not enter the location's shipping address).

After making changes, please connect to the Vaccine Site Locator website at https://vaccines.gov to check that the geolocation correctly identified your location's address.

There will be a delay (up to 3 days) on syncing before your updated address is shown on the Vaccine Site Locator website.

Step 8 of 12: Complete Provider Survey



Complete the **PROVIDER SURVEY** for your vaccination location to share additional information with the public (optional):

1. **Do you Accept Insurance?**
2. **Do you accept walk-ins** (or only appointments)?
3. **Provider Support for Non-English Speaker?** If the answer is Yes, select also supported languages (see next slide in this user guide)
4. **Are you providing in-home vaccinations?**
5. **Participant Name and Email:** this information will not be displayed on the Vaccine Site Locator website, but will serve as a point of contact if there are any questions from NCDHHS
6. **PreScreen Web Address:** enter the direct link to your organization or jurisdiction's pre-screener that is required to make an appointment (if applicable <u>and different from the Appointment Scheduling Website</u>)

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Tips

Hover over the circle information icon for additional guidance on how to answer each question.

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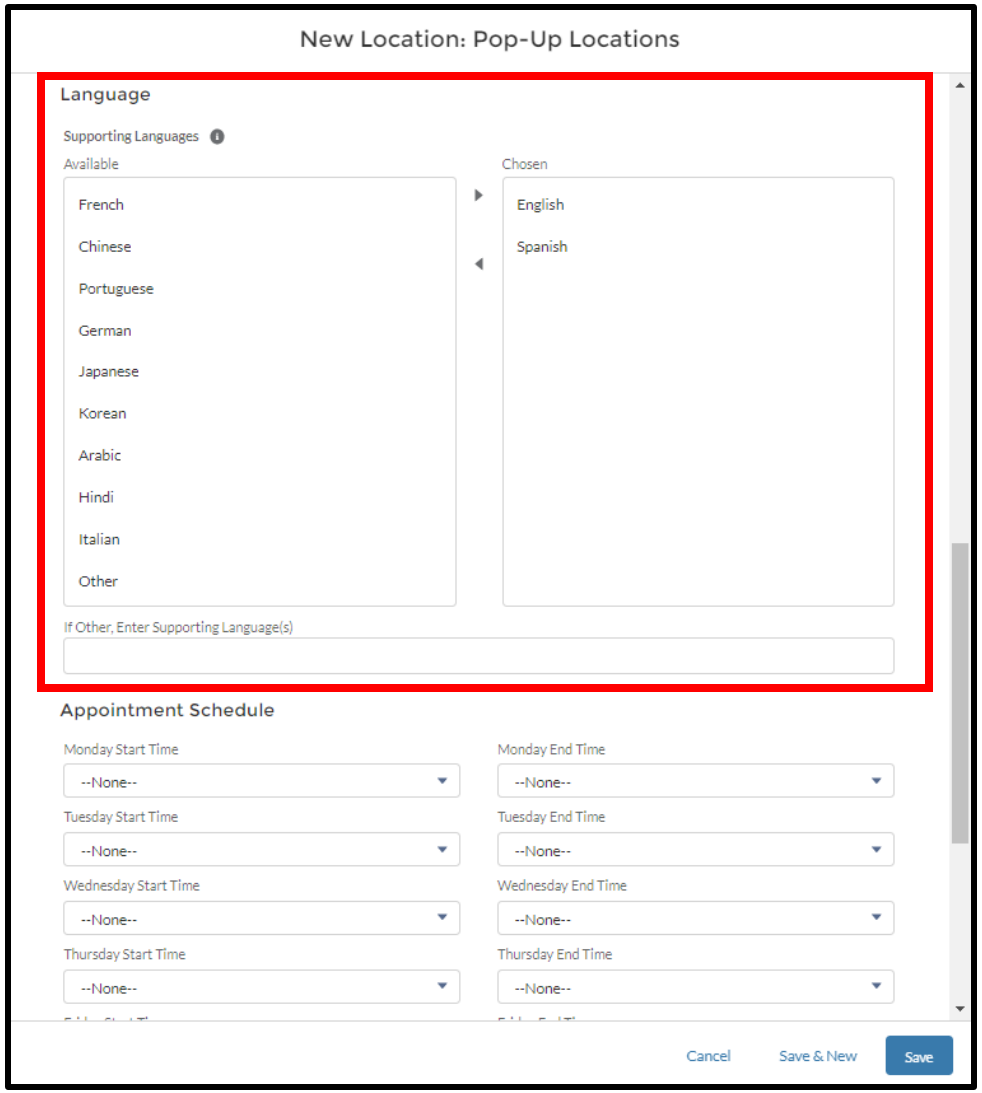
Step 9 of 12: Select the Supported Languages



1. Select the **LANGUAGES** that you support at this location

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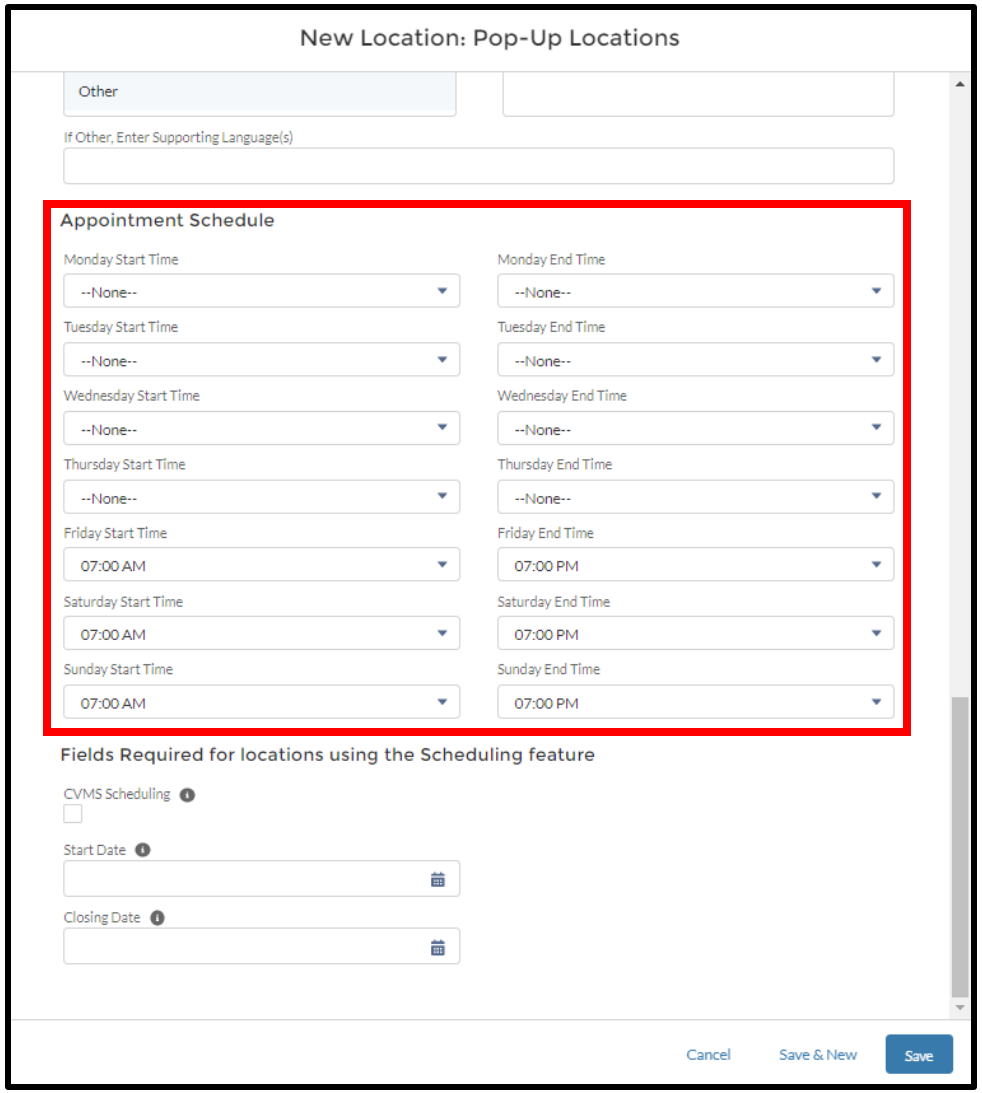
Step 10 of 12: Enter the Appointment Schedule



1. Enter the **APPOINTMENT SCHEDULE** (opening hours during which the public can receive a vaccine at your location)

Note: If you are using the scheduling feature in CVMS, you must also create the Availability Schedule on the Availability tab of the location.

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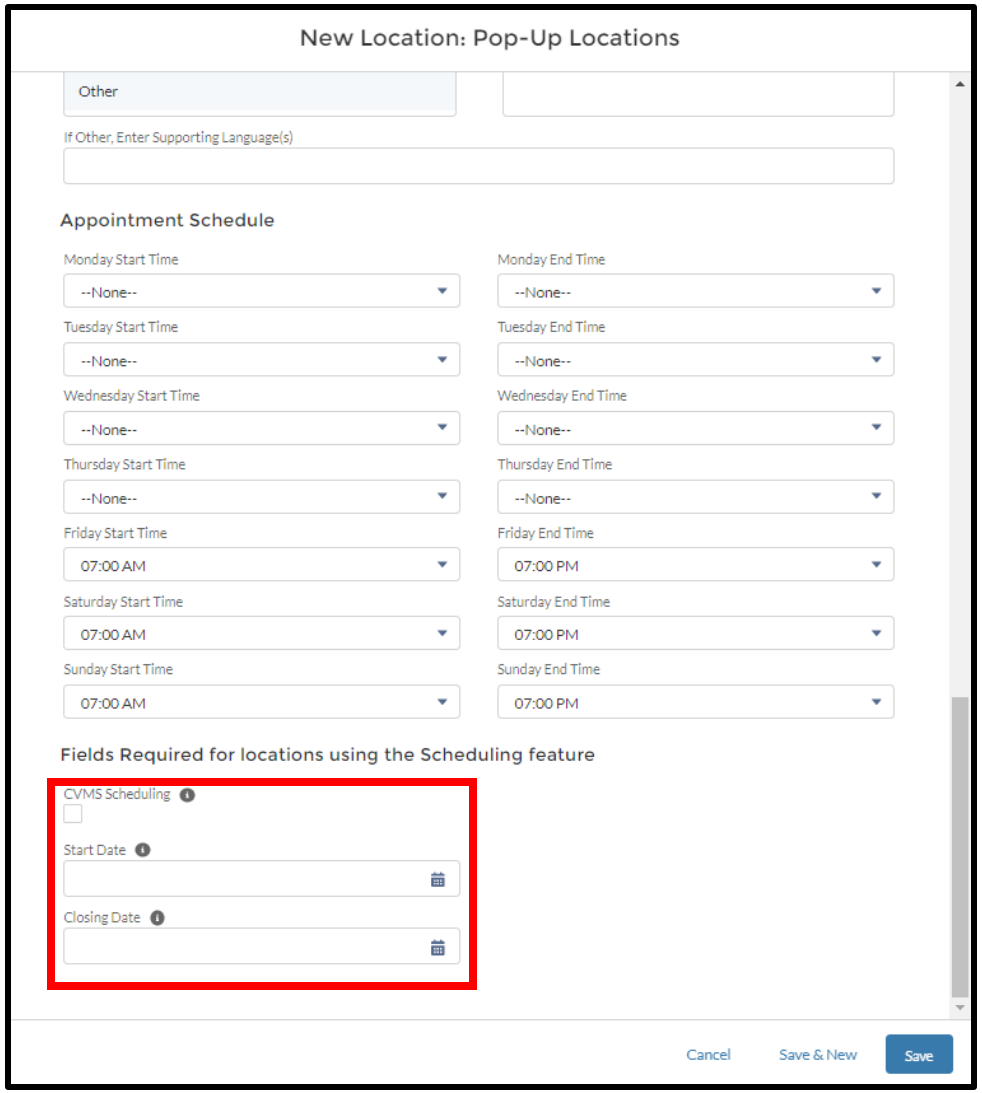
Step 11 of 12: Activate the Scheduling Feature of CVMS and Set Appointment Dates (Optional)



1. If your location will use the scheduling feature in CVMS, check the **CVMS SCHEDULING** box
2. Set the **START DATE** to be the first date for which you would like recipients to book appointments initially
3. Set the **CLOSING DATE** to be the last date for which you would like recipients to book appointments initially

Note: You can change the Start Date and Closing Date later, but recipients will be able to book appointments once the location is displayed on the Vaccine Site Locator website.

You can choose to display the location on the Vaccine Site Locator website later once you are ready for the location to be displayed.

Audience

Healthcare Location Manager

Tips

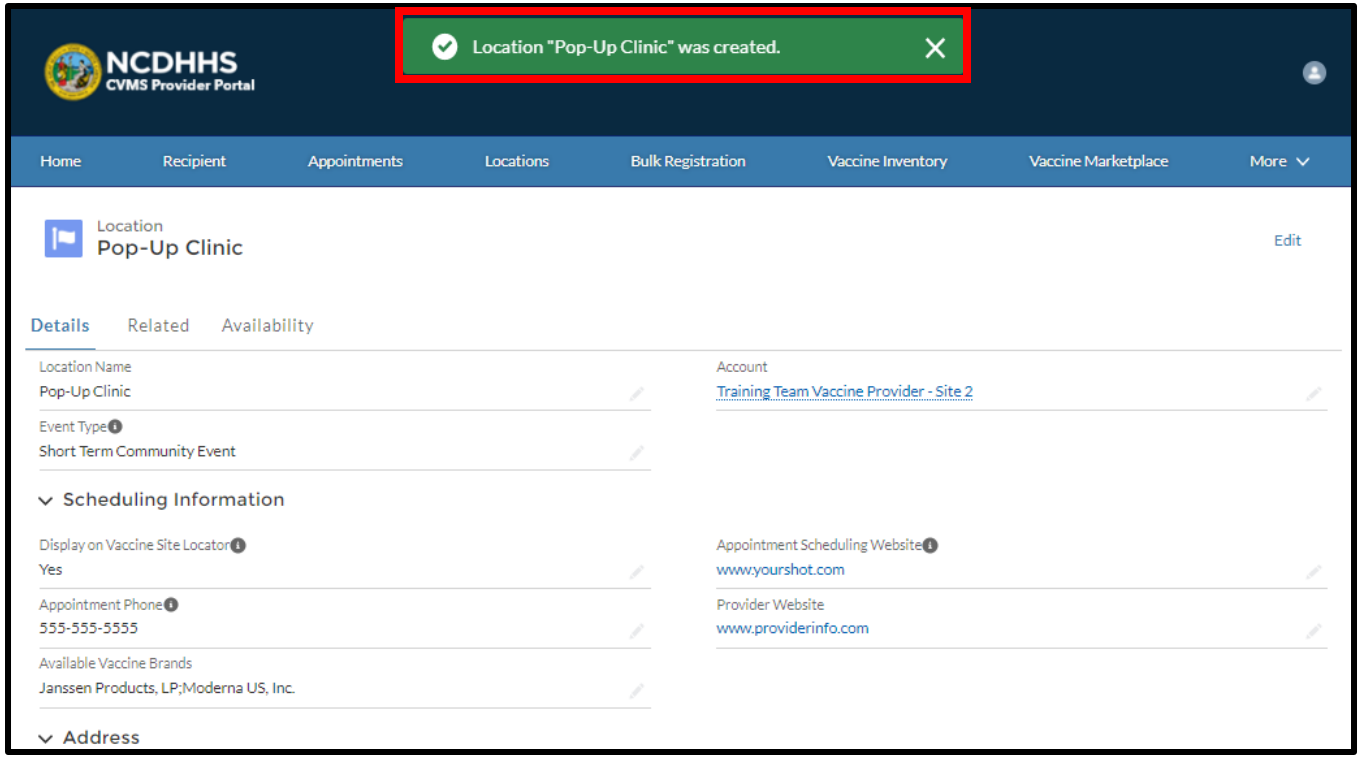
You will be able to check the CVMS Scheduling box only after the scheduling feature is enabled. See the **CVMS Provider Portal Manage Appointment Scheduling User Guide** for more information about utilizing the scheduling feature in CVMS at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-10---invite-recipients-to-self-schedule-their-appointments-optional.

Step 12 of 12: Confirmation

ALWAYS CLICK SAVE AFTER YOU ARE DONE

Once you are created the location and saved the changes, a success notification will appear at the top of the screen.

It may take up to 7 business days for your location to appear on Vaccines.gov. Contact the [CVMS Help Desk]() for assistance.



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Appendix

Location Management Overview

Users with a Healthcare Location Manager profile can list their information on the Vaccine Site Locator website (https://vaccines.gov).

1

As a Healthcare Location Manager, you can edit your location information that is displayed on the Vaccine Site Locator website (https://vaccines.gov).

You can also add new locations for community vaccine events that can be displayed on the Vaccine Site Locator website.

2

In the CVMS Provider Portal, you can click on the name of the location you wish to edit and then click on the edit button.

To create a new location for a community vaccine event, you can click on the new button.

Vaccine Site Locator Key Terms

Public Location Name	The location name that appears on the Vaccine Site Locator website (https://vaccines.gov).
Community Vaccine Event	Select Long-Term Events for recurring pop-up events (i.e., weekly). Select Short Term Events for one-time pop-up community vaccine events. For permanent locations, select 'Not Applicable'.
Display on Vaccine Site Locator	This field MUST have the value of YES to appear on the public Vaccine Site Locator website. Select NO if your location should NOT be listed. You should only ever set it to NO if you are only vaccinating a limited recipient population (e.g., long-term care facility, prison).
Appointment Scheduling Website	Enter the public facing website URL where people can schedule appointments or learn how to get vaccinated at your site. You can leave blank this field if you are using the scheduling feature in CVMS.
CVMS Scheduling	Indicates that this location will use the scheduling feature in CVMS. This feature is optional.

CVMS Steps For Providers

- ✓ Step 1 - Register your organization
- ✓ Step 2 - Register each vaccine location and all prescribing providers who will administer vaccine
- ✓ Step 3 - Obtain NCID credentials
- ✓ Step 4 - Create user accounts for your organization's CVMS users
- ✓ Step 5 - Navigate the CVMS Provider Portal
- ✓ Step 6 - Receive and manage vaccine inventories
- ✓ Step 7 - Add locations to the find a vaccine location website
- ❑ Step 8 - Invite recipients to register in the COVID-19 Vaccine Portal
- ❑ Step 9 - Invite recipients to self-schedule their appointments (optional)
- ❑ Step 10 - Check-in recipients and document vaccination

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, Safari, or Edge Chromium 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 supported.

User Guide Change Log

Version	Date of Change	Changes Made	Author
1	03/12/2021	• Initial document	Kevin Kauffman, Kechia Scott, Kristin Clark
2	03/25/2021	• Added tip about Display Vaccine Site Locator field	Tabitha McKelvy
3	04/01/2021	• Update screenshots to add Available Vaccine Brand field to location record	Tabitha McKelvy
4	04/16/2021	• Updated screenshots and content to show Enable Scheduling and Display on Vaccine Site Locator dropdown • Added tip to set the Location Setting to Default	Kevin Kauffman
5	05/17/2021	• Updated screenshots and content to show the scheduling dates being on the location details • Removed references to Location Setting	Kevin Kauffman
6	06/11/2021	• Updated new location information to align with CDC Vaccine Site Locator	Kevin Kauffman
7	06/23/2021	• Updated order of new and edit location fields	Kevin Kauffman
8	07/12/2021	• New user guide format	Vanessa Kemajou
9	08/26/2021	• Help Desk references Updated	Kaitlin Gates