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

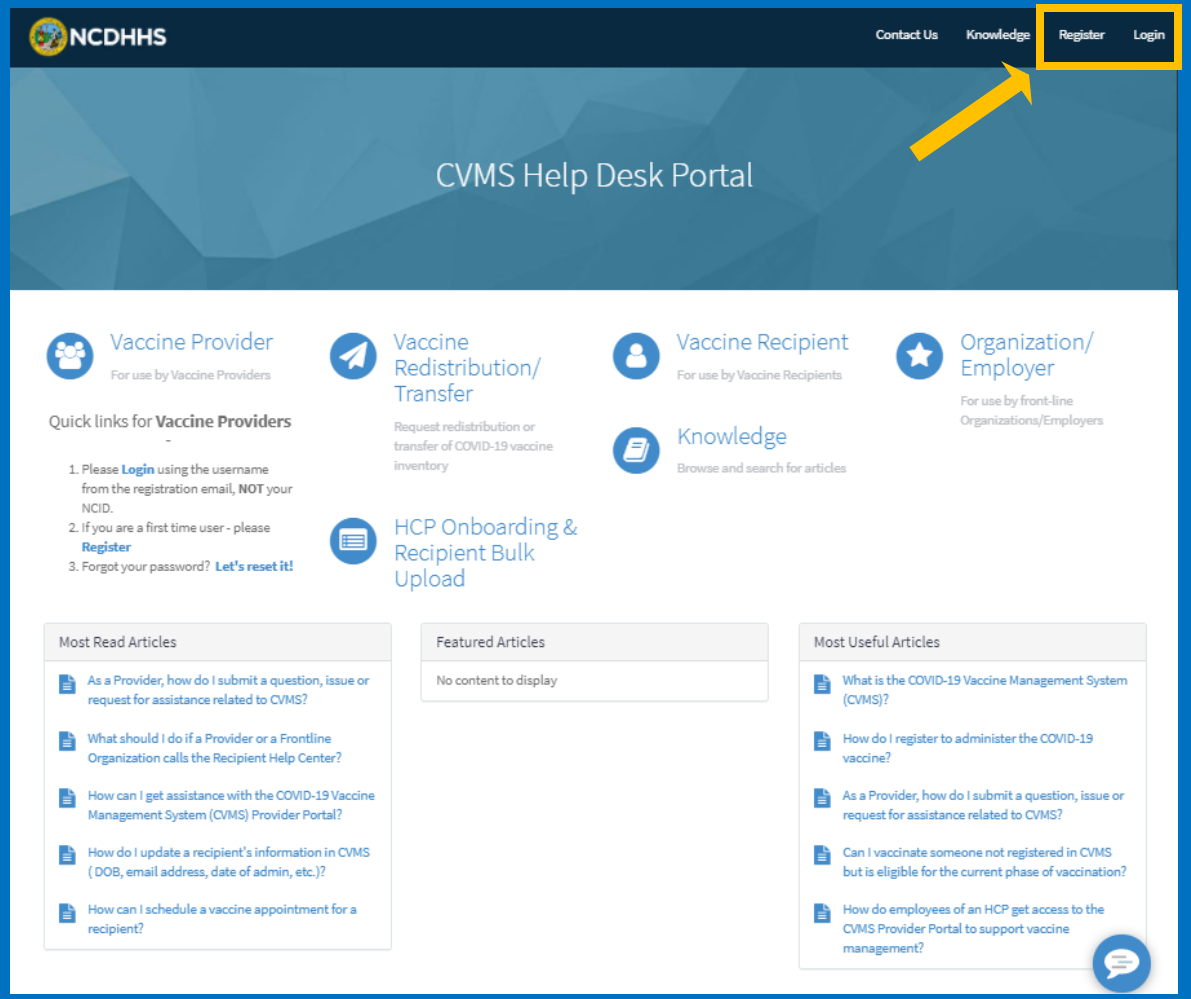
Step 9 - Invite recipients to self-schedule their appointments (optional)

User Guide

Version 9

July 27, 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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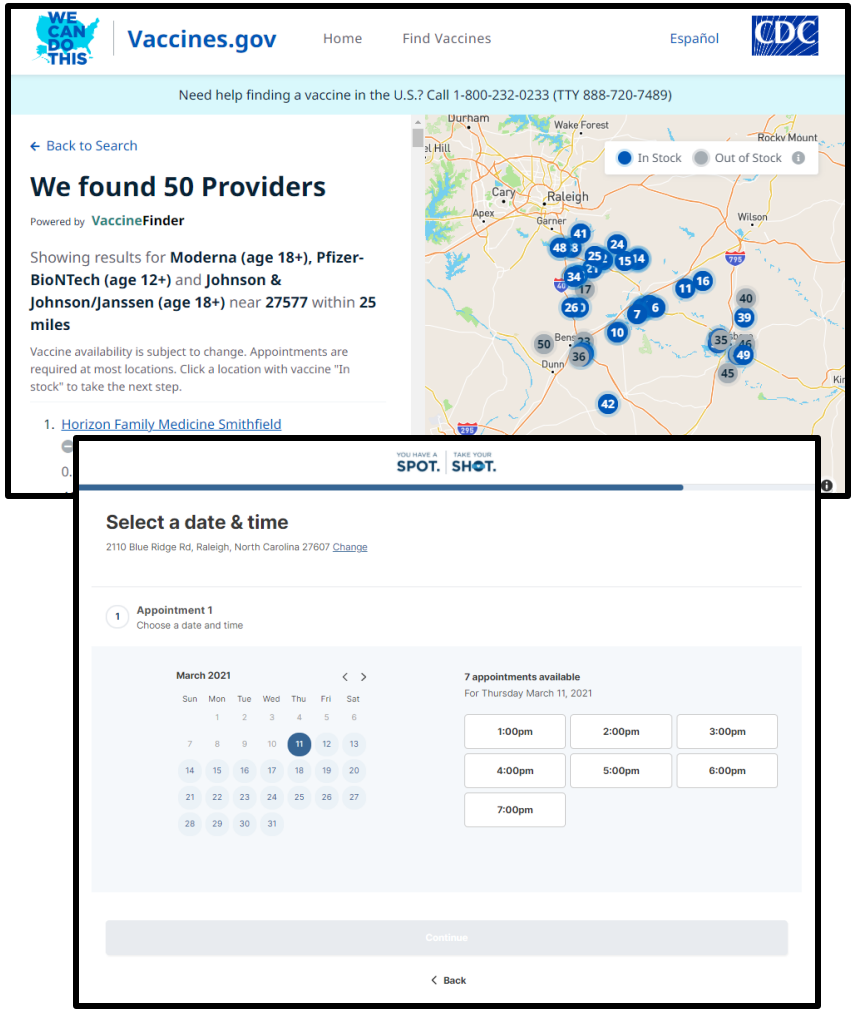
Overview

Overview



The scheduling feature in CVMS is optional. It will allow your locations to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment for a COVID-19 vaccine and register in CVMS altogether. You will then be able to schedule their 2nd dose appointment the day of their 1st dose appointment.

Note that these **appointments slots will be made available to the general public**. Therefore, this feature will NOT fit your needs if you vaccinate only a selected group of recipients (e.g., long-term care facility, prison).

In this user guide, we will review how to activate and use the scheduling feature in CVMS. You will be able to:

- Activate the scheduling feature in CVMS
- Publish appointments on the Vaccine Site Locator website

The processes included in this user guide are for users with the **Healthcare Location Manager profile only**.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at https://covid-vaccine-provider-portal.ncdhhs.gov with your NCID username and password

Now, let's get started!

Appointment Scheduling Overview

The Appointment Scheduling process enables Healthcare Location Managers to adjust schedule availability and publish public-facing appointment slots on the CDC's Vaccines.gov website.

1. Enable scheduling for your account in the CVMS Provider Portal.

2. Once enabled, you can set up the scheduling feature for your location(s) in the CVMS Provider Portal and allow recipients to self-schedule their first-dose appointments.

3. Set your weekly availability to receive appointments.

   Update the number of first-dose appointments you can receive regularly.

CVMS Scheduling Key Terms

Appointments Per Time Window	The number of concurrent appointments this location can complete per stated time window duration. Keep in mind the number of clinicians available at the time.
Start Date	First day the location will show available appointment slots.
Closing Date	Last day the location will show available appointment slots on the Vaccine Site Locator website.
Vaccine Supply	The Vaccine (Appointment) Supply record is the number of appointments that are made available.
Current Stock	The total number of appointments your location will offer to recipients. This should match the number of doses to cover all existing and future appointments. If no stock remains, location won't display available slots.
Date of Stock Count	Date of creation of the Vaccine Supply Record. Once created, **do not edit this date.**
Dose Number	Create two vaccine supply records for 1st and 2nd dose. Use this field to identify if this vaccine supply includes 1st dose or 2nd dose vaccine.

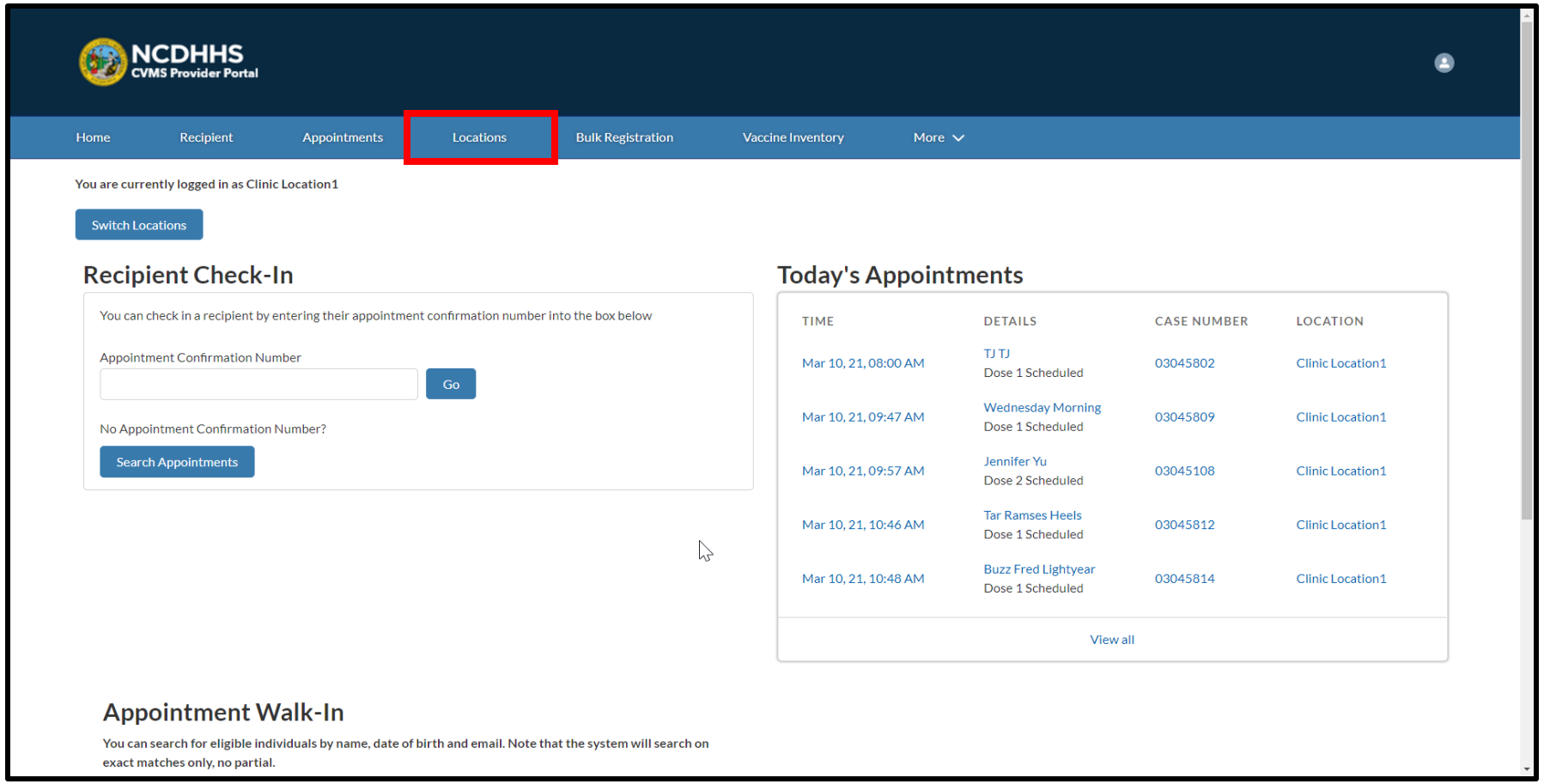
Initial Setup of the Scheduling Feature in CVMS

Enable the Scheduling Feature

Step 1 of 5: Navigate to the Locations Tab

Providers can opt-in to using the scheduling feature in CVMS.

1. Click on the **LOCATIONS** tab



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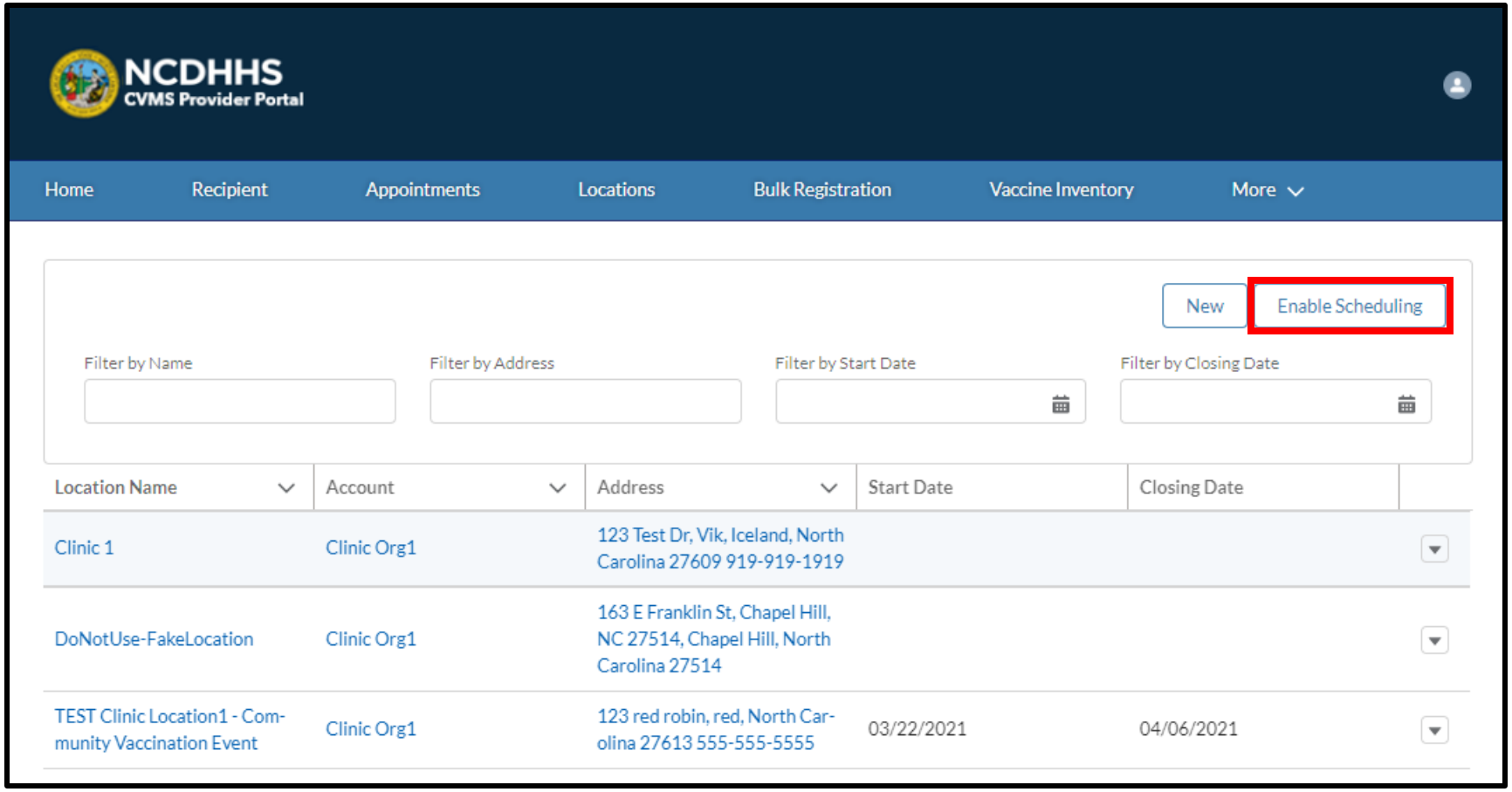
Step 2 of 5: Begin to Enable Scheduling

1. Click the **ENABLE SCHEDULING** button



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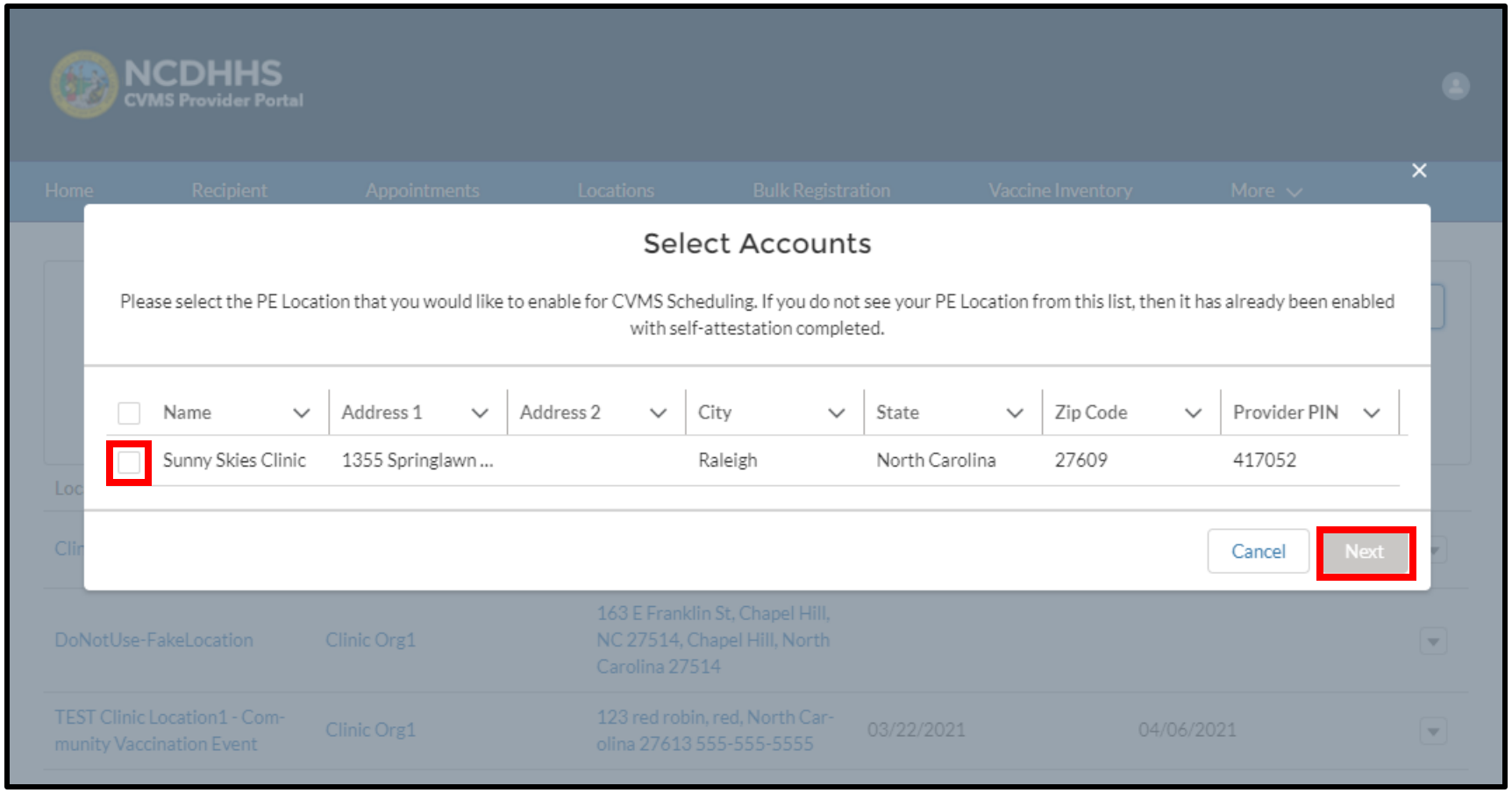
Step 3 of 5: Select Provider Account

The scheduling feature in CVMS can be enabled for each provider account. Once your account has been enabled, all locations associated with that provider can begin using the scheduling feature in CVMS.

1. Select the provider(s) for which you want to enable the scheduling feature in CVMS
2. Click **NEXT**



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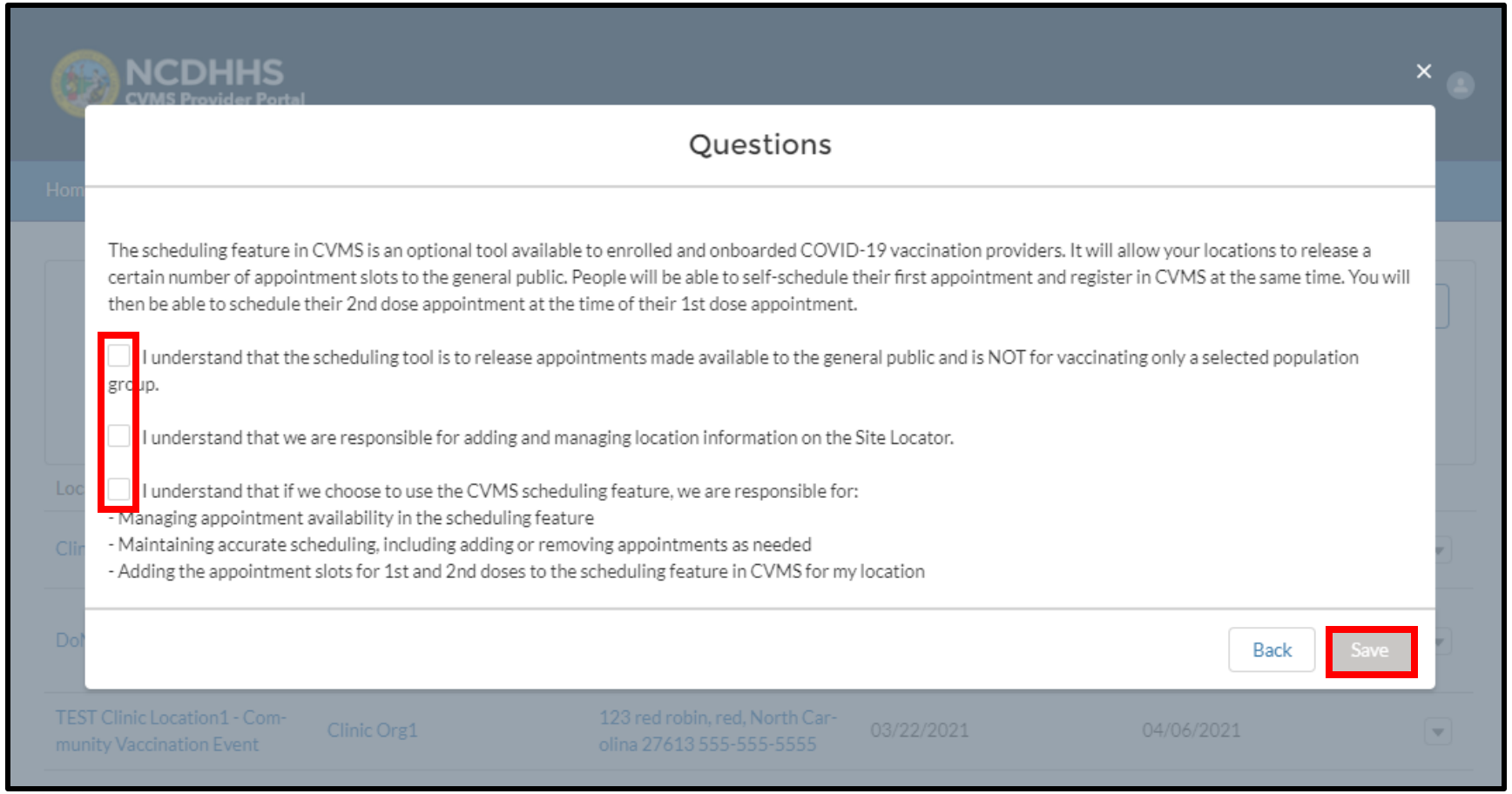
Step 4 of 5: Review Questions

Read and review the statements. You must agree to all statements before you can enable the scheduling feature in CVMS for your location.

1. Check the checkbox attesting that you understand each statement
2. Click **SAVE**



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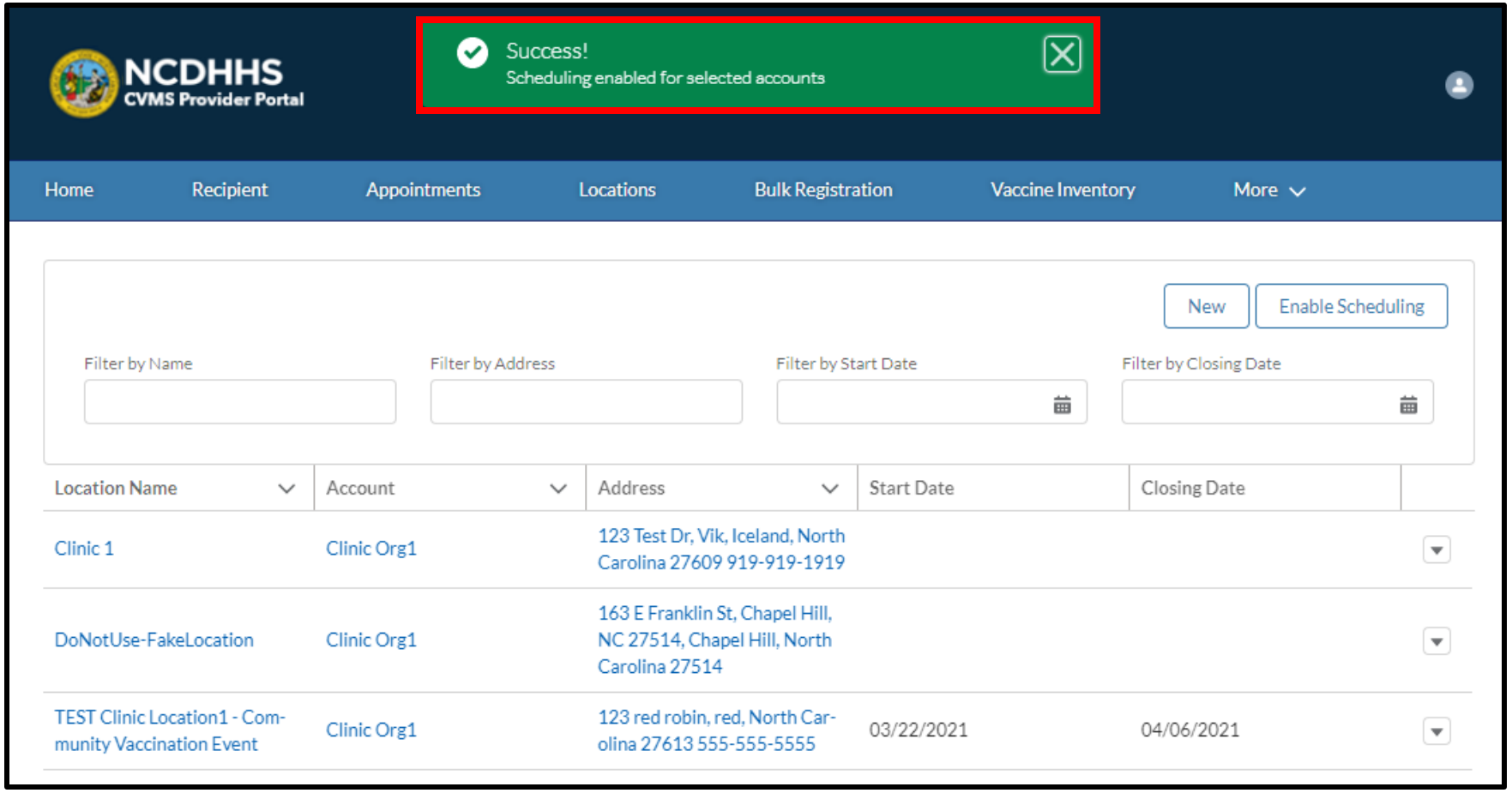
Step 5 of 5: Navigate to the Locations Tab

Congratulations! Your selected location is now enabled to use the scheduling feature in CVMS!



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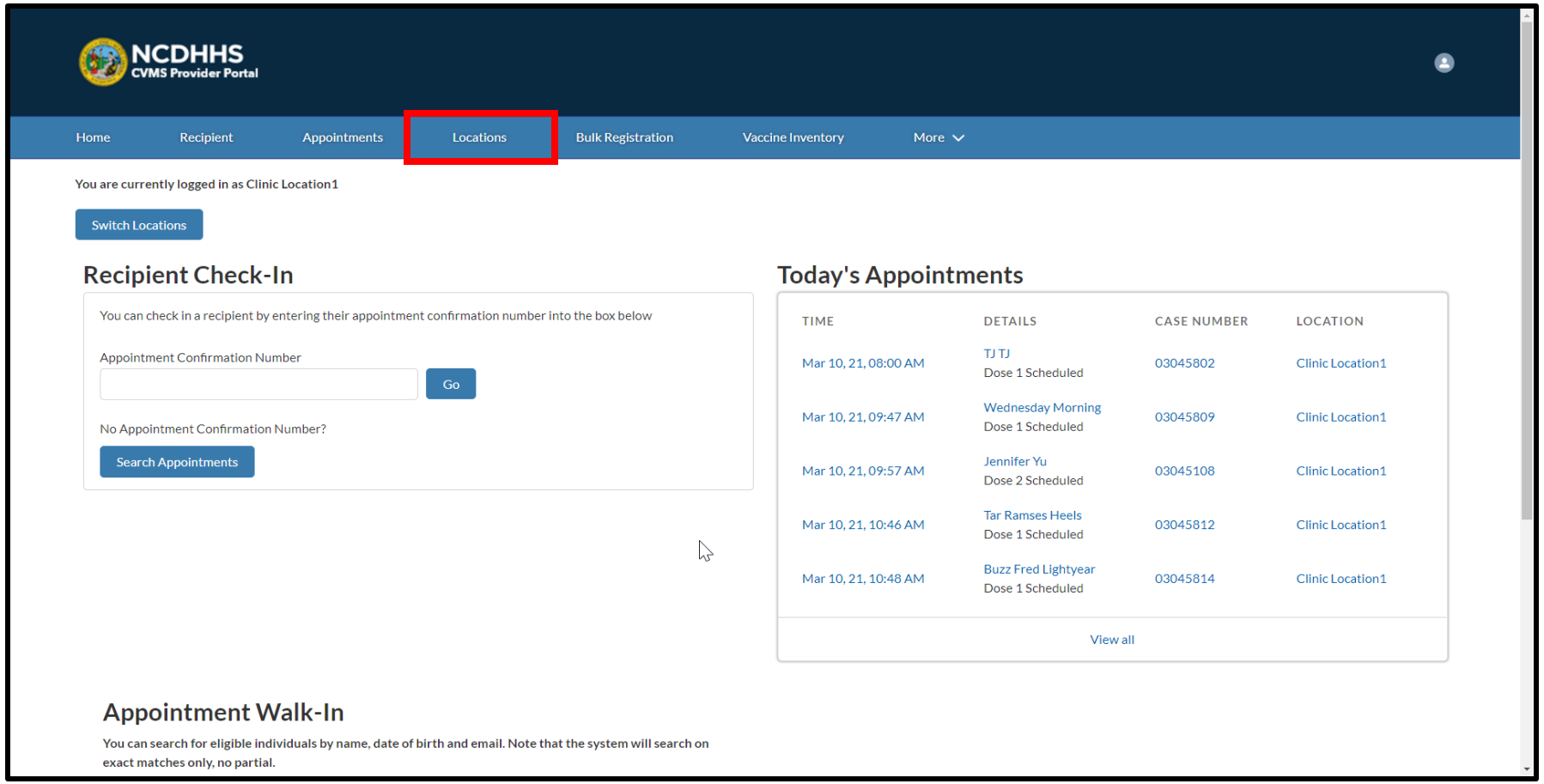
Activate Scheduling for Your Location

Step 1 of 4: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab



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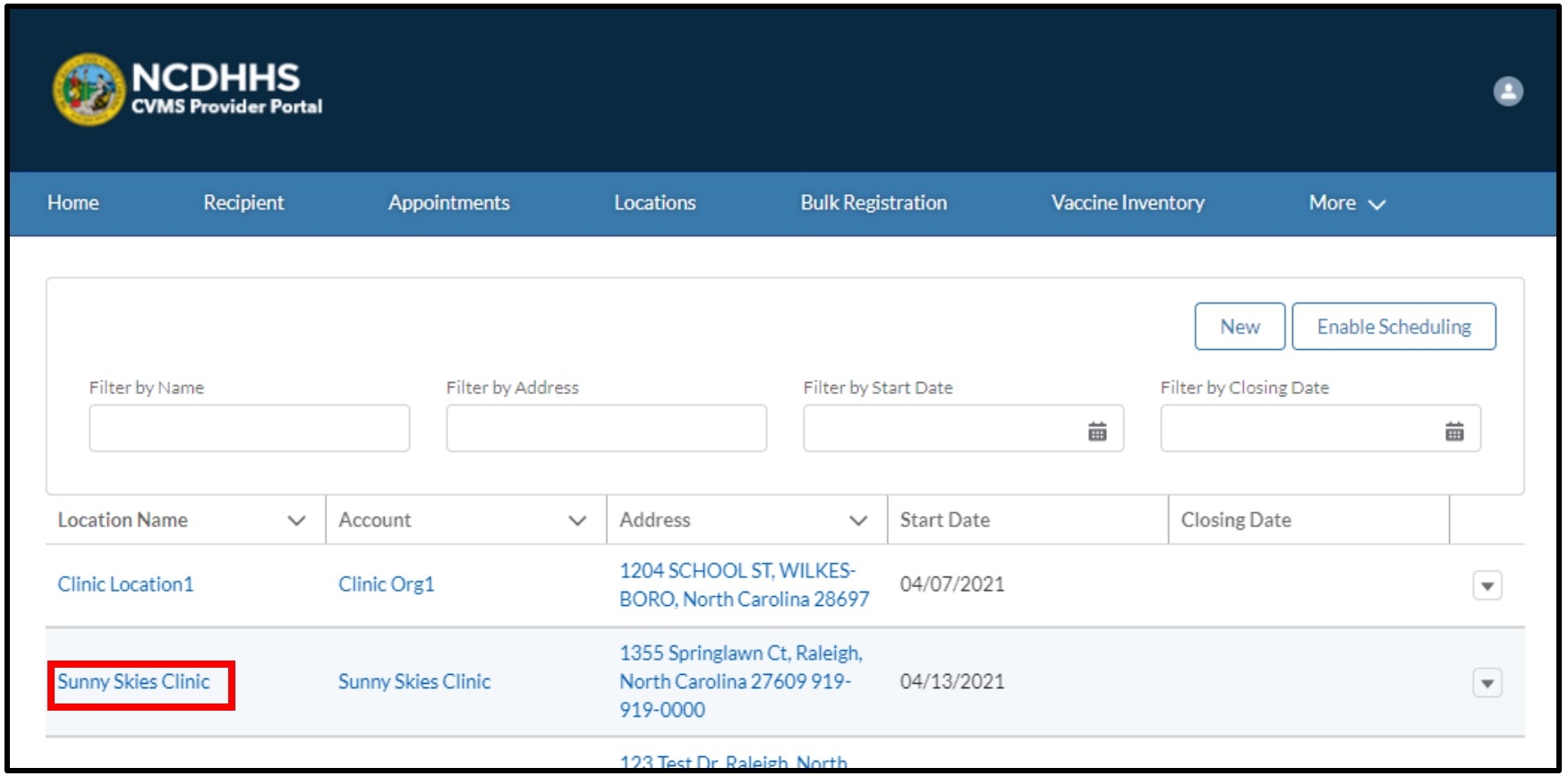
Step 2 of 4: Select the Location

1. Click on the **LOCATION NAME** for which you wish to enable the scheduling feature in CVMS



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Healthcare Location Manager

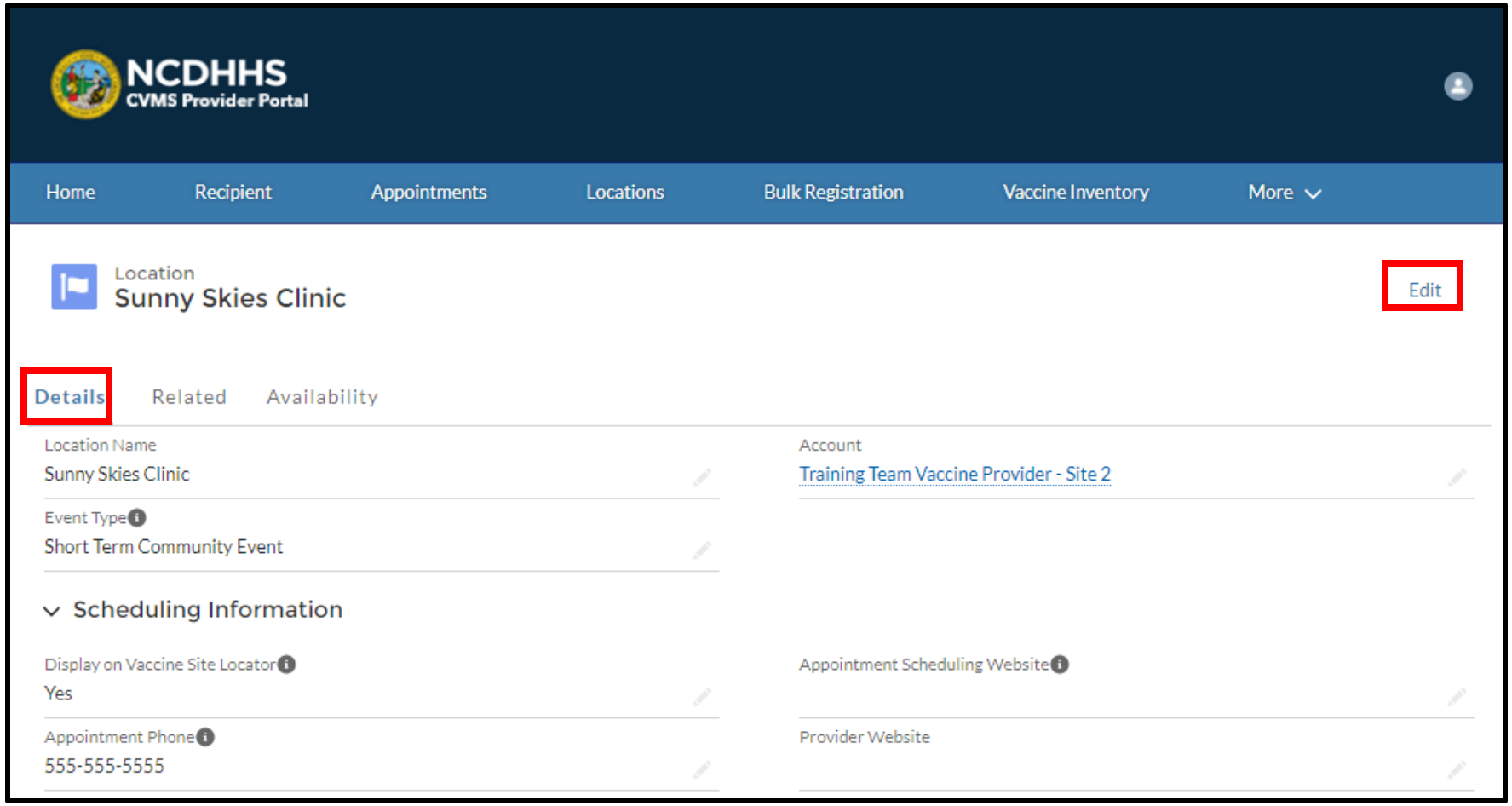
Tips

You can choose to enable the scheduling feature in CVMS for some or all your locations.

Step 3 of 4: Edit your Location Record

Navigating to the Details tab allows you to view and edit location details.

1. Click **EDIT**



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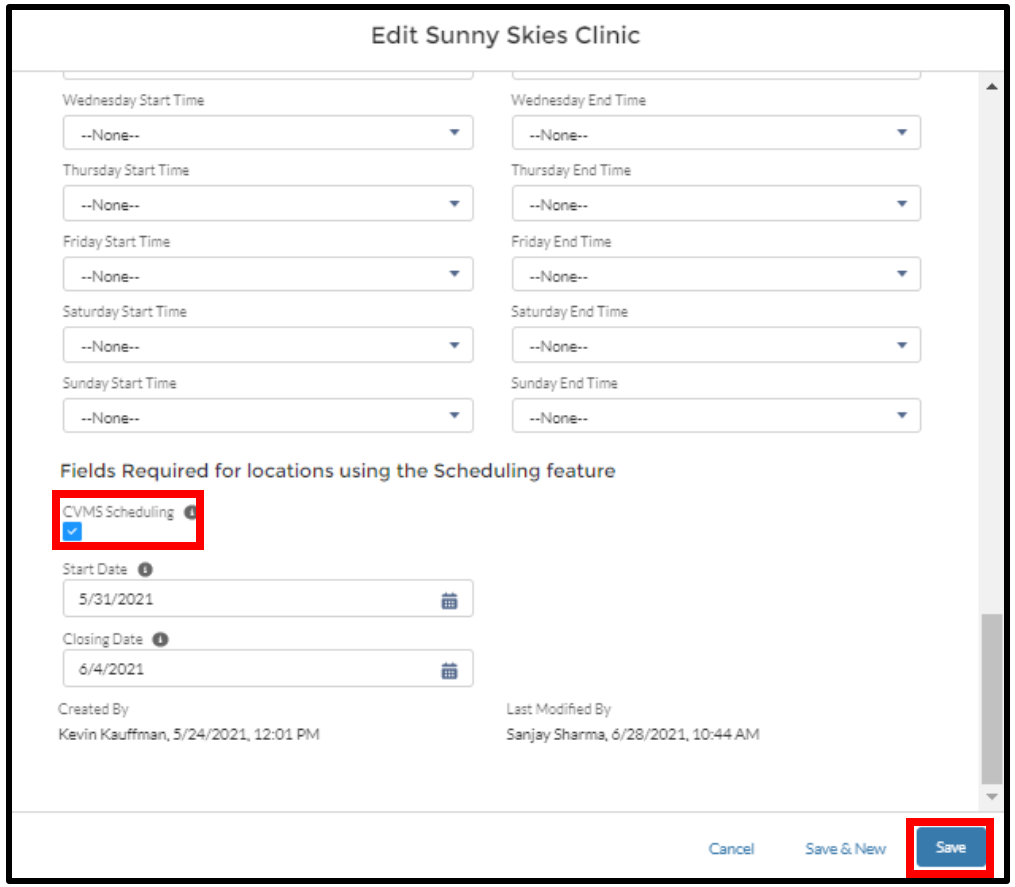
Tips

Locations will be displayed on the Vaccine Site Locator website https://vaccines.gov if the Display on Vaccine Site Locator field is set to **YES** and if the Location Setting field is set to **DEFAULT**.

Step 4 of 4: Activate the Scheduling Feature of CVMS for your Location

1. Check the **CVMS SCHEDULING** box
2. Click **Save**



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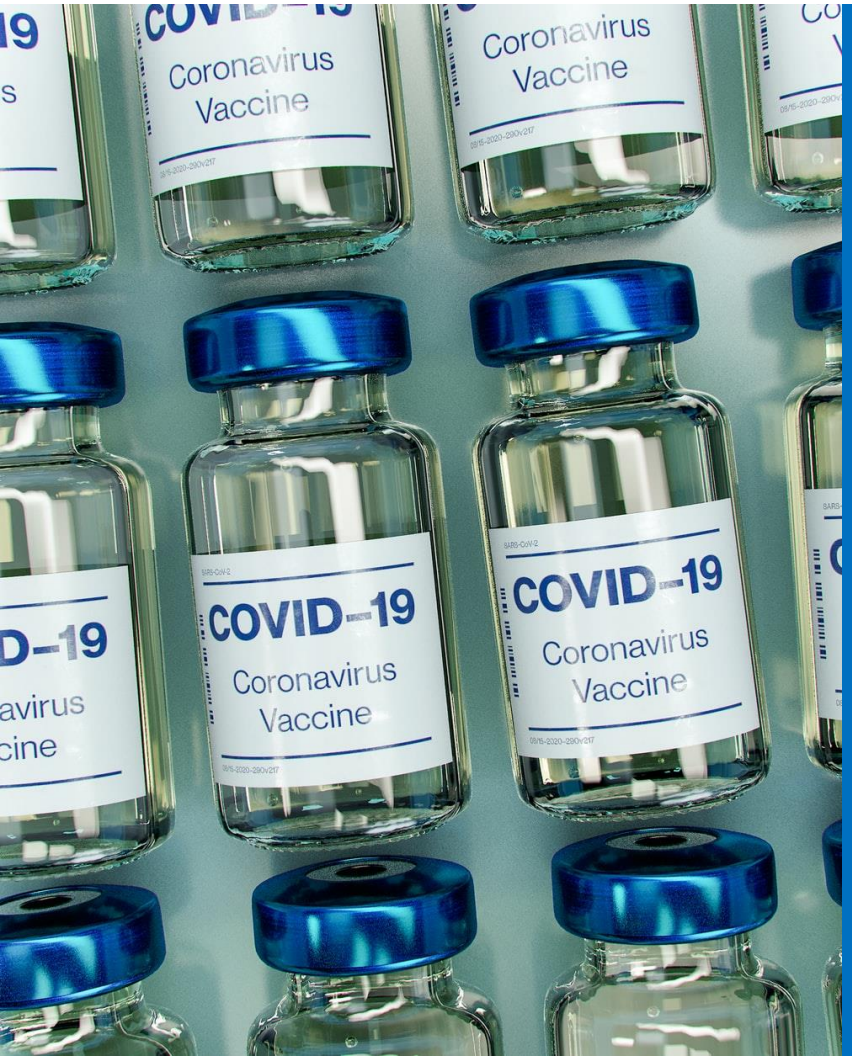
Tips

Both **CVMS Scheduling** and **Display on Vaccine Site Locator** should be checked to allow recipients to find your site and book appointments.

Publish Appointment slots using the Scheduling Feature in CVMS

Set Maximum Number of Appointments

Setting Vaccine Supply



"Vaccine (Appointment) Supply" is what sets the total number of <u>first dose</u> appointments available

- Set 1st dose Vaccine Supply to equal the number of 1st dose appointments you want to make available <u>for that location</u>

- It does NOT need to be the same as your total inventory on hand.

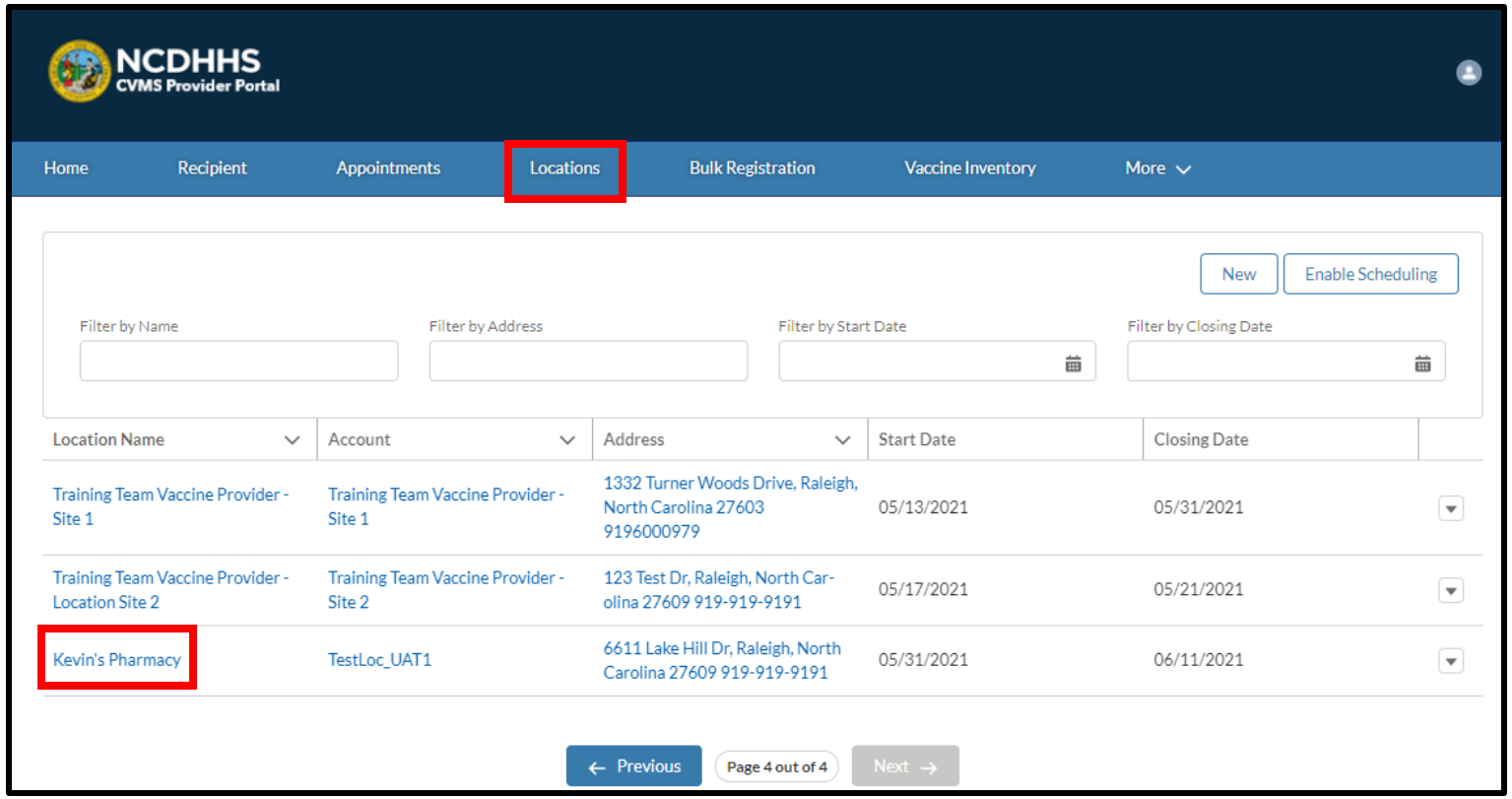
  → If you need to hold back doses (e.g., set aside for a planned event, Historically Marginalized Population outreach), do not include those in the "Vaccine Supply"

- You should only release the number of First-Dose appointments you are able to cover with your doses

Step 1 of 5: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. Note the same weekly schedule will be used to book 1st and 2nd dose appointments (if applicable). To begin, you must navigate to the location.

1. Click on the **LOCATION TAB**
2. Click on the **LOCATION NAME** hyperlink



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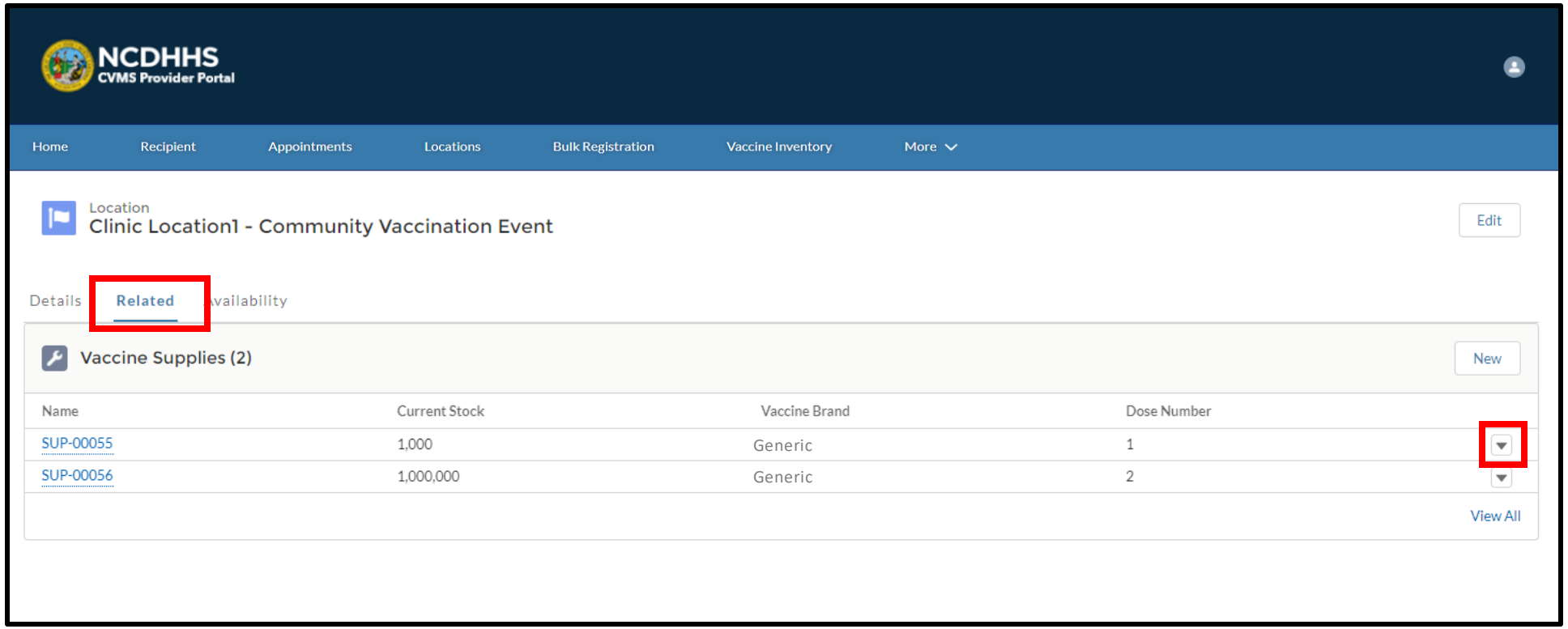
Step 2 of 5: Edit your 1st Dose Vaccine Supply Record

1. Click on **RELATED**
2. Click on the down arrow for the **DOSE NUMBER 1 VACCINE SUPPLY RECORD**
3. Click **EDIT**



Audience

Healthcare Location Manager

Tips

You will not need to maintain the 2nd Dose Vaccine Supply record once created if you make the Current Stock very large.

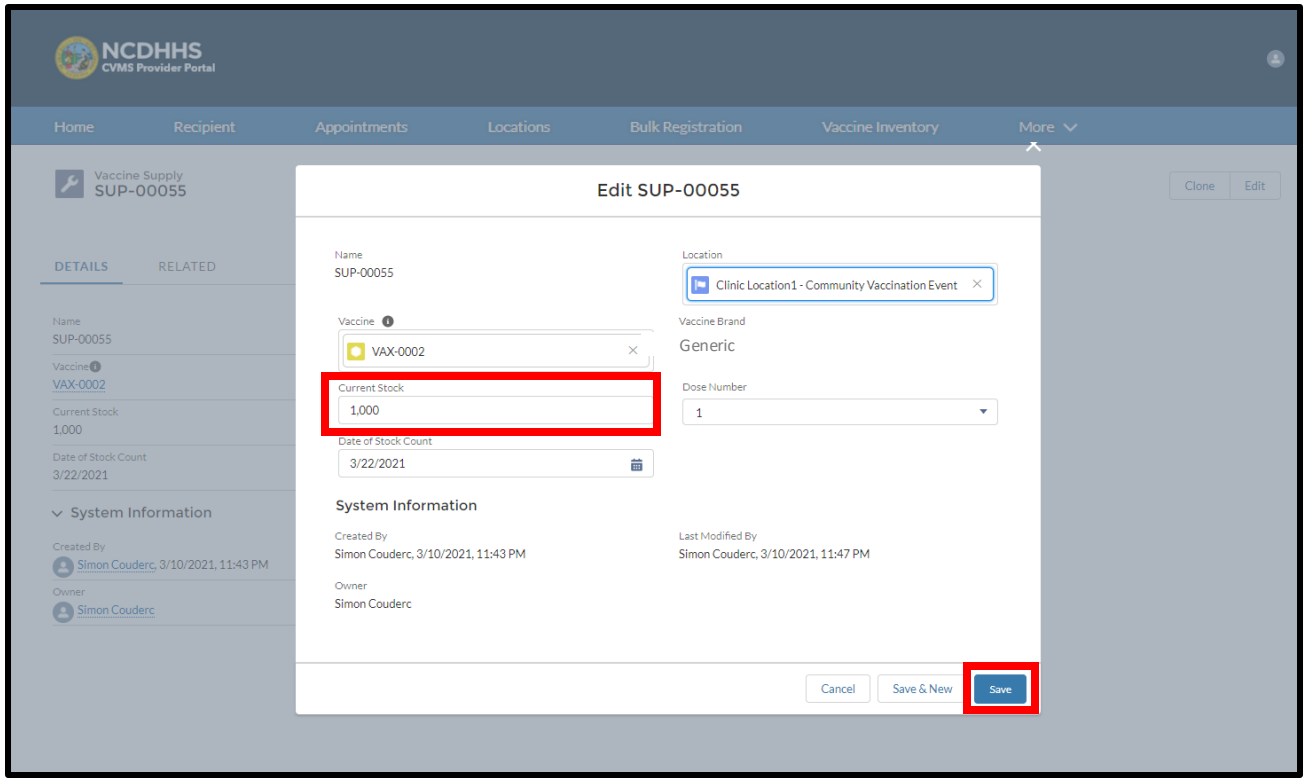
Step 3 of 5: Add new appointments to the Number of 1st Dose Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new 1st dose appointments to be offered

   Note: Each appointment scheduled by a recipient will reduce the remaining number of appointments. Therefore, add to the current stock to allow for additional appointments.

   For example, if you wish to allow 100 additional appointments and the current stock is set at 900, update the Current Stock field to show 1,000.

2. Click **SAVE**



Audience

Healthcare Location Manager

Tips

There is no correlation between Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments and to track 1st and 2nd doses.

The change takes effect immediately, so this number should only be increased when the location has the supply to support additional appointments.

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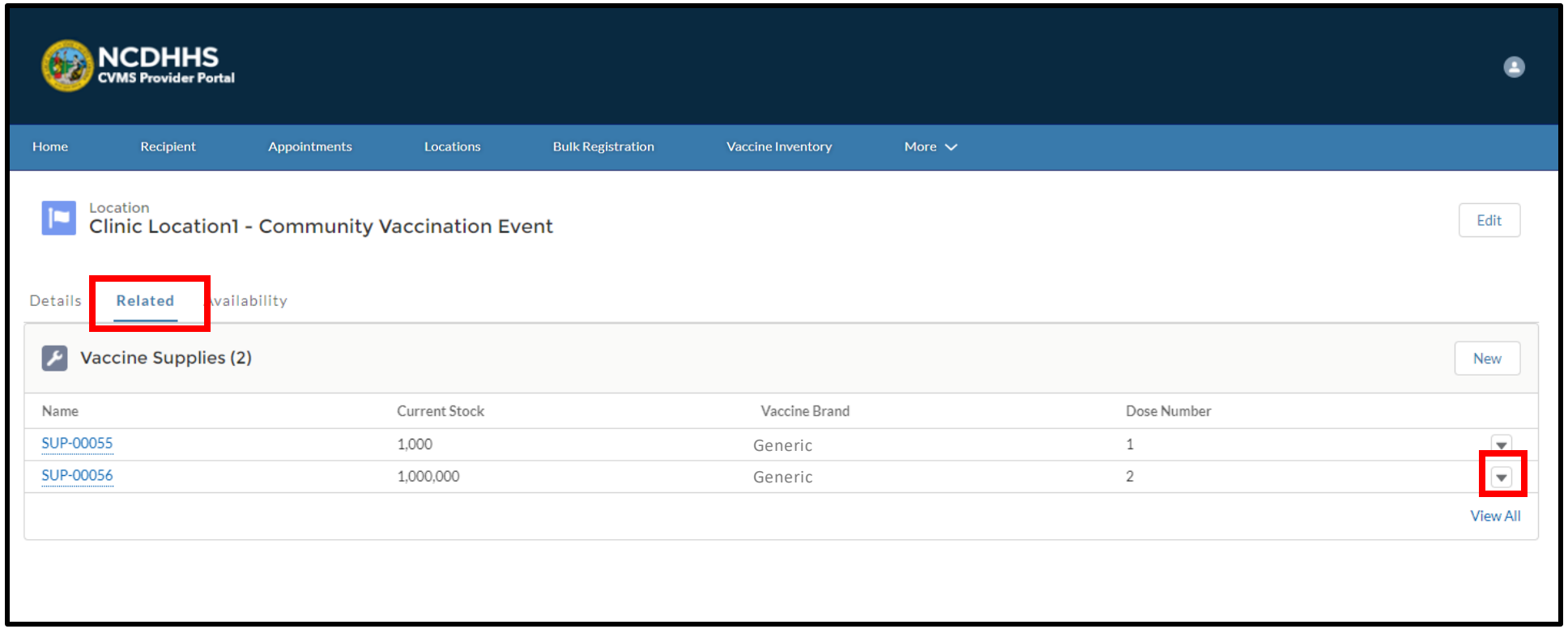
Step 4 of 5: Edit your 1st Dose Vaccine Supply Record

1. Click on **RELATED**
2. Click on the down arrow for the **DOSE NUMBER 2 VACCINE SUPPLY RECORD**
3. Click **EDIT**



Audience

Healthcare Location Manager

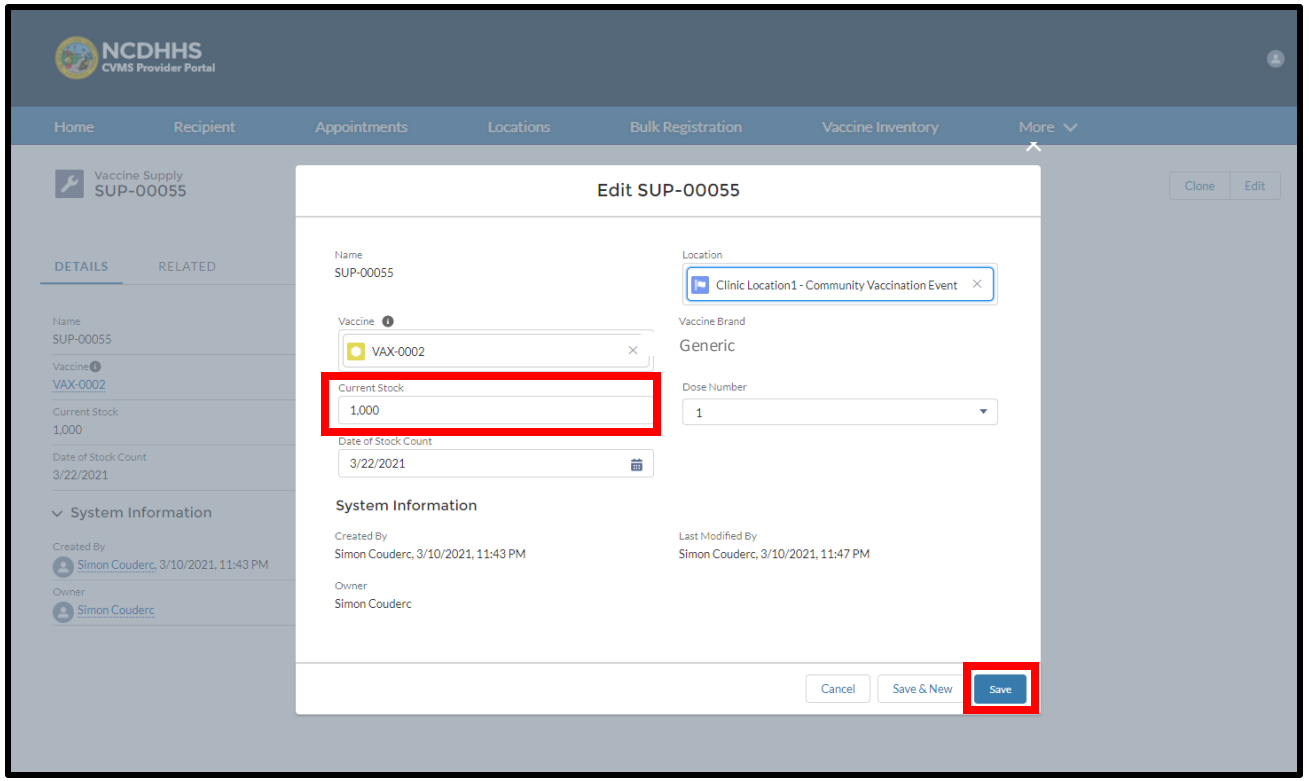
Tips

You will not need to maintain the 2nd Dose Vaccine Supply record once created if you make the Current Stock very large.

Step 5 of 5: Add new appointments to the Number of 1st Dose Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new 2nd dose appointments to be offered\

   Note: When recipients have received for their first-dose appointment, you will be able to schedule their second-dose appointment (if applicable). Therefore, make the Current Stock large so you do not need to maintain the number of second-dose appointments to be released in the system.
2. Click **SAVE**



Audience

Healthcare Location Manager

Tips

There is no correlation between Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments and to track 1st and 2nd doses.

The change takes effect immediately, so this number should only be increased when the location has the supply to support additional appointments.

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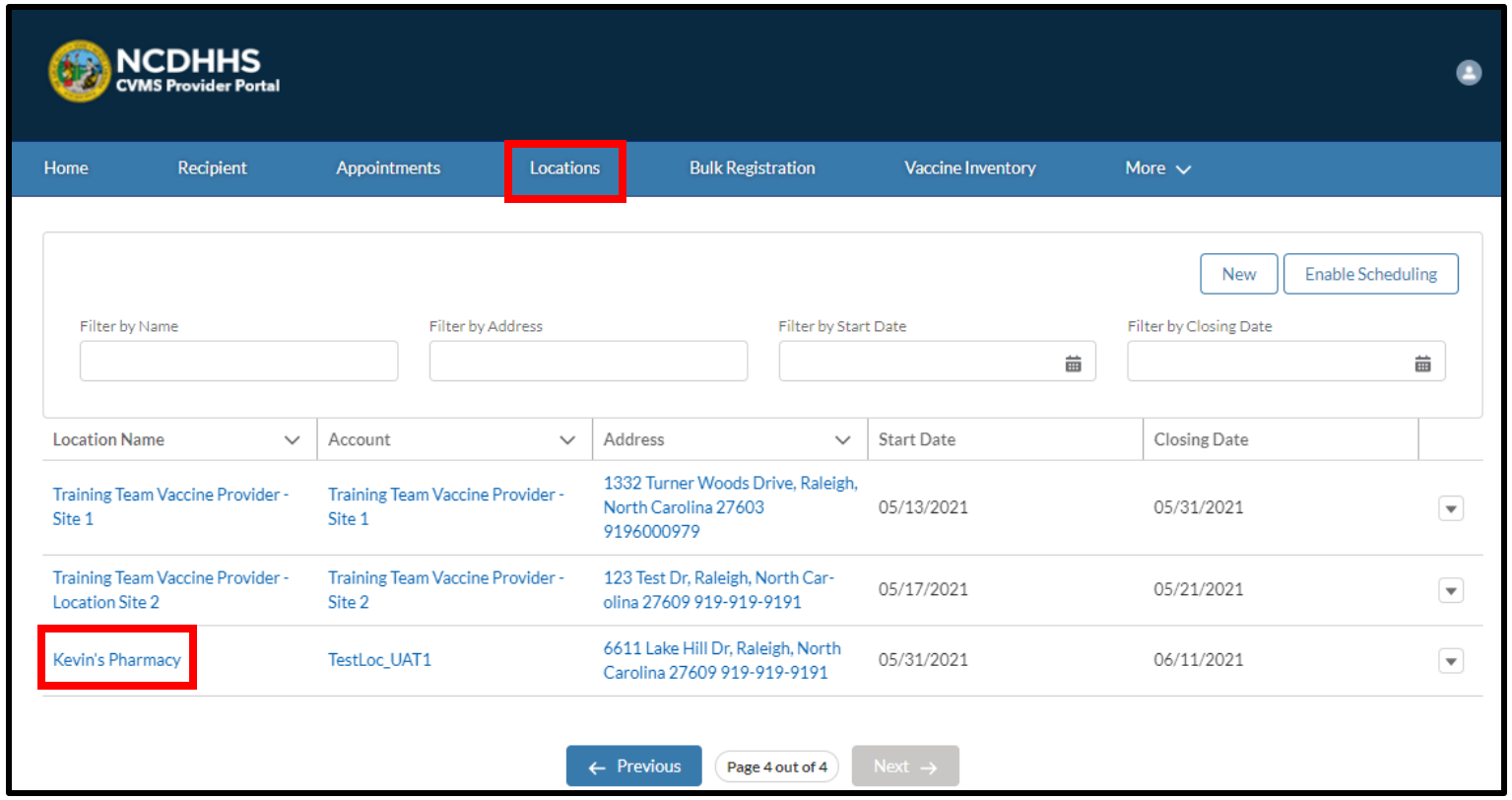
Set Weekly Location Schedule for Dose 1 and Dose 2 appointments

Step 1 of 8: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. Note the same weekly schedule will be used to book 1st and 2nd dose appointments (if applicable). To begin, you must navigate to the location.

1. Click on the **LOCATION TAB**
2. Click on the **LOCATION NAME** hyperlink



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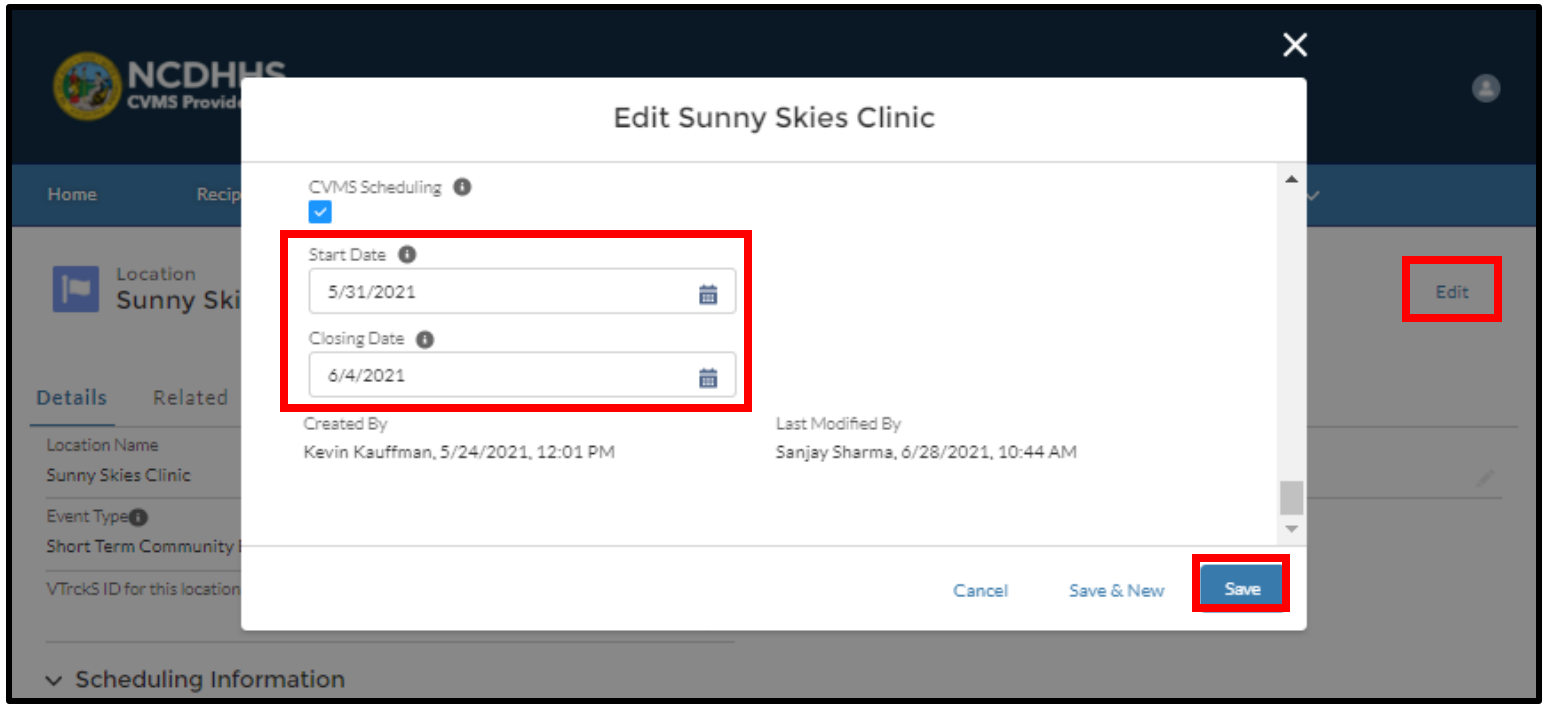
Healthcare Location Manager

Step 2 of 8: Set the Dates for which Recipients can Book an Appointment

First dose appointment slots will be available for recipients to book appointments between the **START DATE** and **CLOSING DATE** for a location.

1. Click on the **DETAILS** tab
2. Click Edit
3. Enter the location **START DATE**
4. Enter the location **CLOSING DATE**
5. Click **SAVE**



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Healthcare Location Manager

Tips

You may regularly edit the **CLOSING DATE** to extend it as you receive more **VACCINE INVENTORY**.

Second dose appointments will be available for booking after the minimum period between 2 doses (if applicable). See the Addendum for CVMS Scheduling Feature User Guide for additional instructions at https://covid19.ncdhhs.gov/addendum-scheduling-feature-point-care-and-vaccine-administration-user-guide/download.

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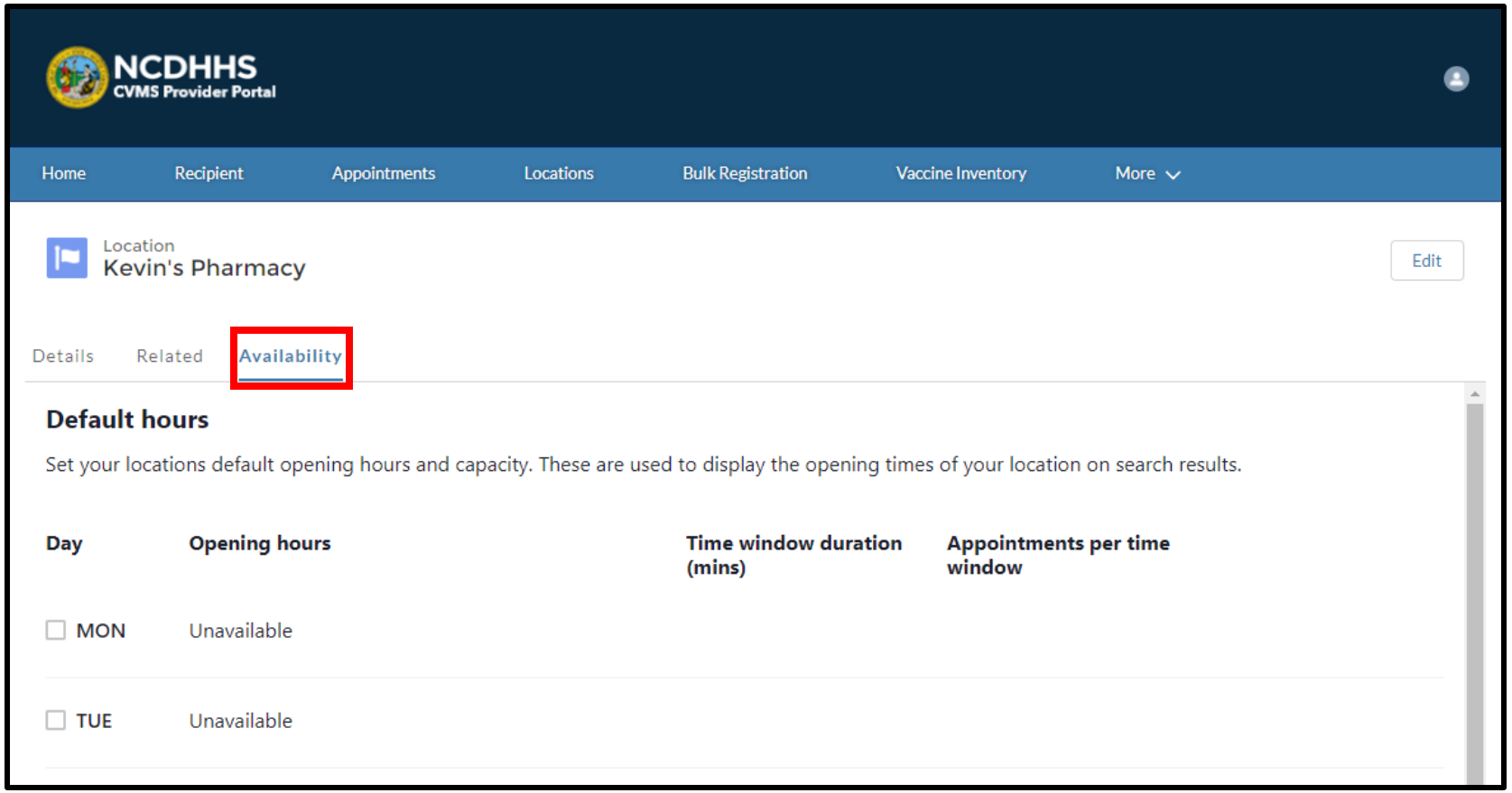
Step 3 of 8: Open the Availability tab

The default vaccination schedule for a location is created and managed on the **AVAILABILITY TAB**.

1. Click on the **AVAILABILITY TAB**



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Healthcare Location Manager

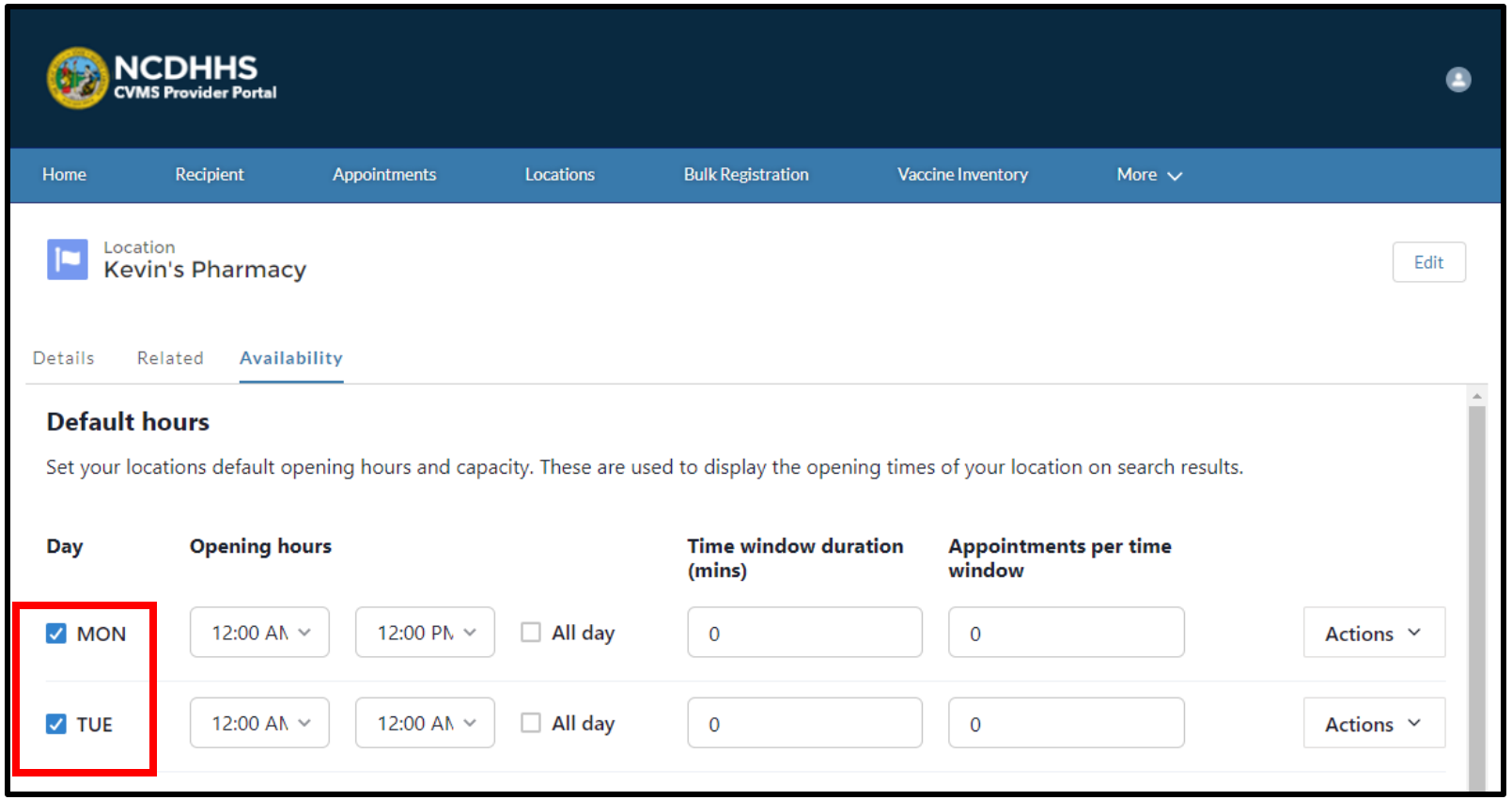
Tips

All previously scheduled appointments will be unaffected by updates to the vaccination schedule.

Step 4 of 8: Select Opening Days

A location will set weekly time to administer vaccinations from its **START DATE** to its **CLOSING DATE** for first dose appointments and second dose appointments.

1. Check the checkbox for each day you will administer vaccinations at this location (Monday through Sunday)



Audience

Healthcare Location Manager

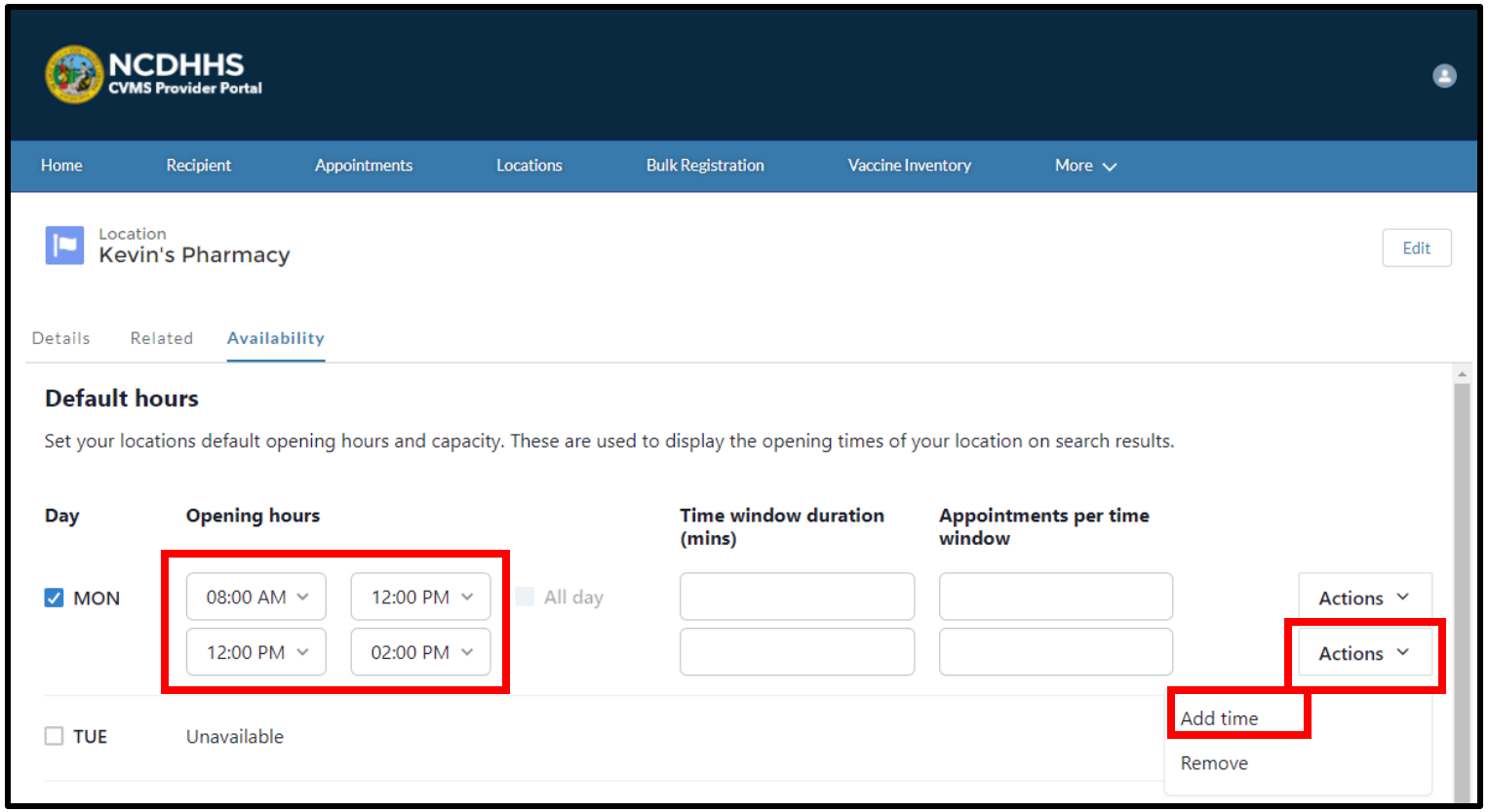
Tips

Unselected days will not be open to appointments.

Step 5 of 8: Set Opening Hours

For each open day you will need to set the **OPENING HOURS** per time window. You can have multiple time windows within the same day. To add another time window, click on the **ACTIONS** on the right and select **ADD TIME**.

1. Enter the **OPENING HOURS**



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Tips

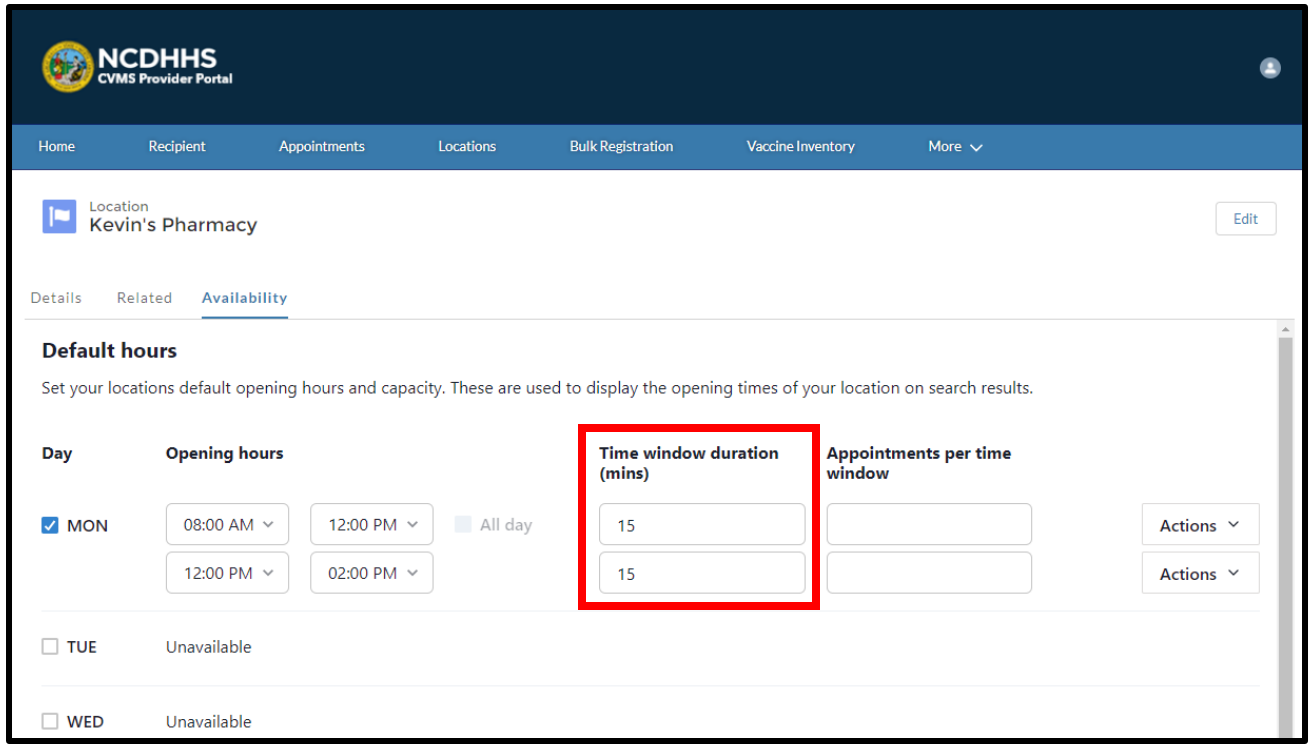
Do not check the **ALL DAY** checkbox as this will allow appointments to be scheduled over a 24-hour period.

You may not enter a time twice on the same day (e.g., a time window on Monday from 8 AM to 6 PM and another time window on Monday from 8 AM to 11 AM).

Step 6 of 8: Enter Time Window Duration

The **TIME WINDOW DURATION (MIN)** is the length of time it takes for a single vaccinator to administer a vaccination (typically 5 to 15 minutes). Appointments will be created at evenly spaced intervals throughout the **OPENING HOURS** at the location. If the **OPENING HOURS** require a unique **TIME WINDOW DURATION**, you must add another opening hours.

1. Enter the **TIME WINDOW DURATION (MIN)** applicable for the entire schedule at this location



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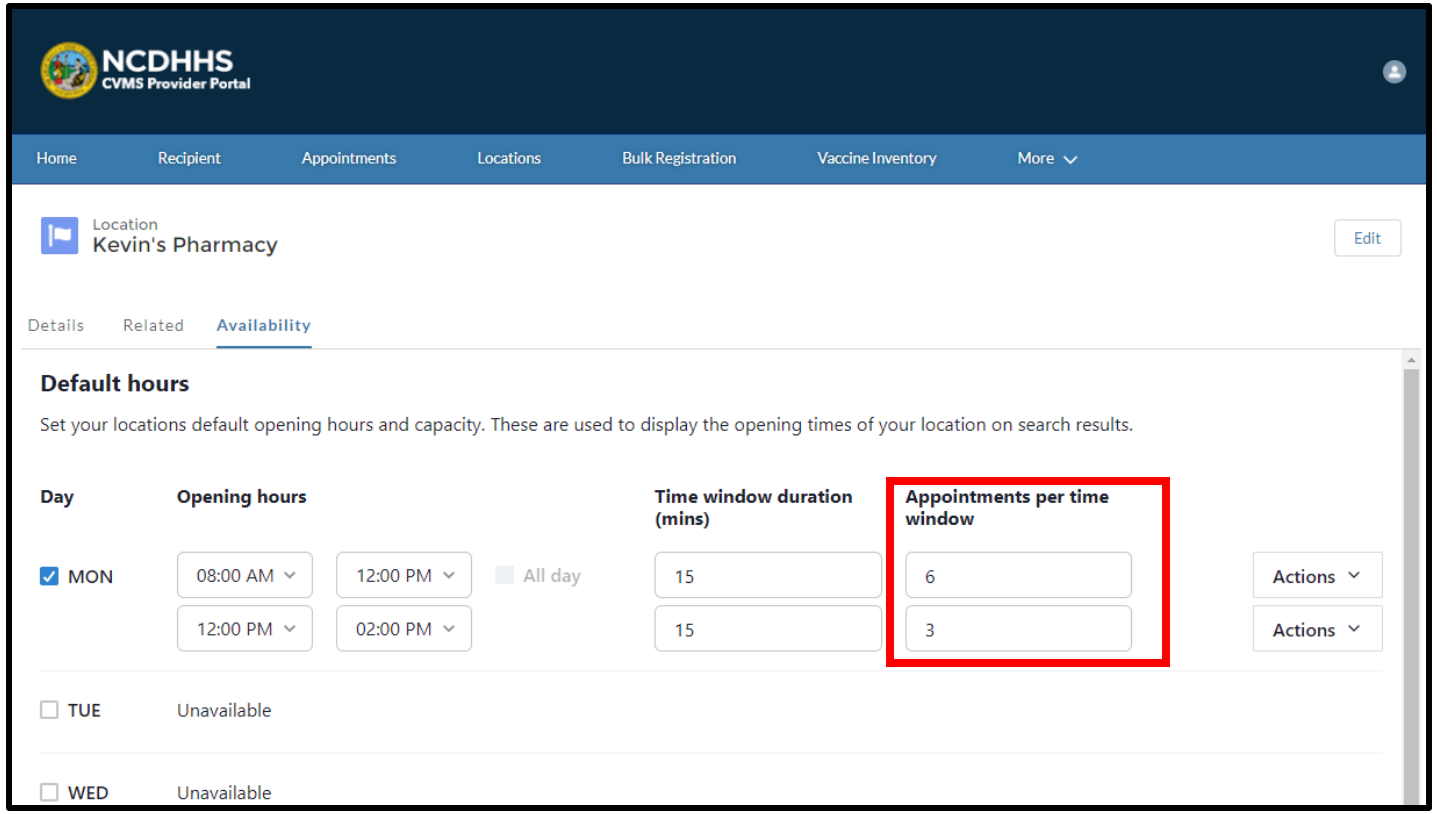
Step 7 of 8: Enter Appointments Per Time Window

Appointments per time window is the number of people you can vaccinate at the same time. If the **OPENING HOURS** require a unique **APPOINTMENTS PER TIME WINDOW**, you must add another opening hours.

1. Enter the **APPOINTMENTS PER TIME WINDOW**



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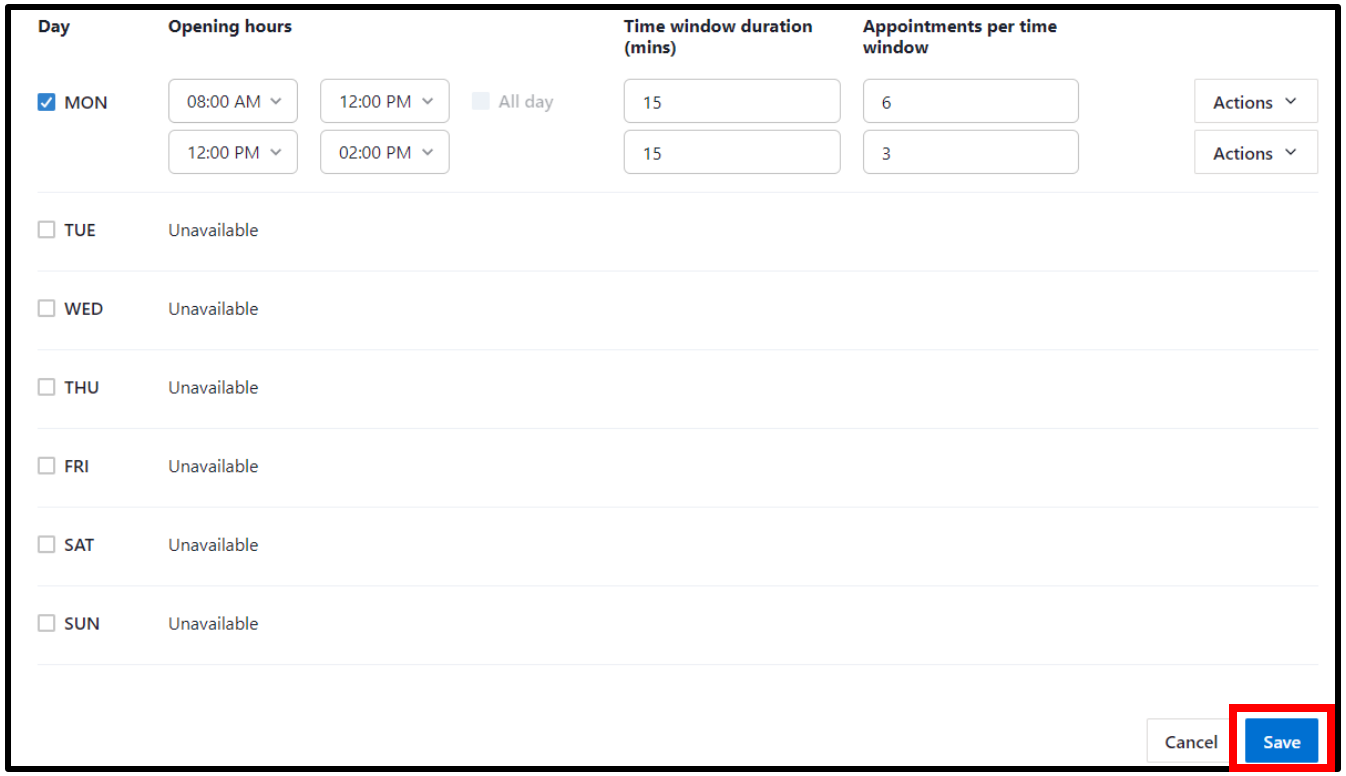
Step 8 of 8: Finalize Schedule

You have now created a default schedule for your location.

1. **REVIEW** the schedule for the location
2. Click **SAVE**

Congratulations! You have now finalized the default schedule for your location!



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Healthcare Location Manager

Tips

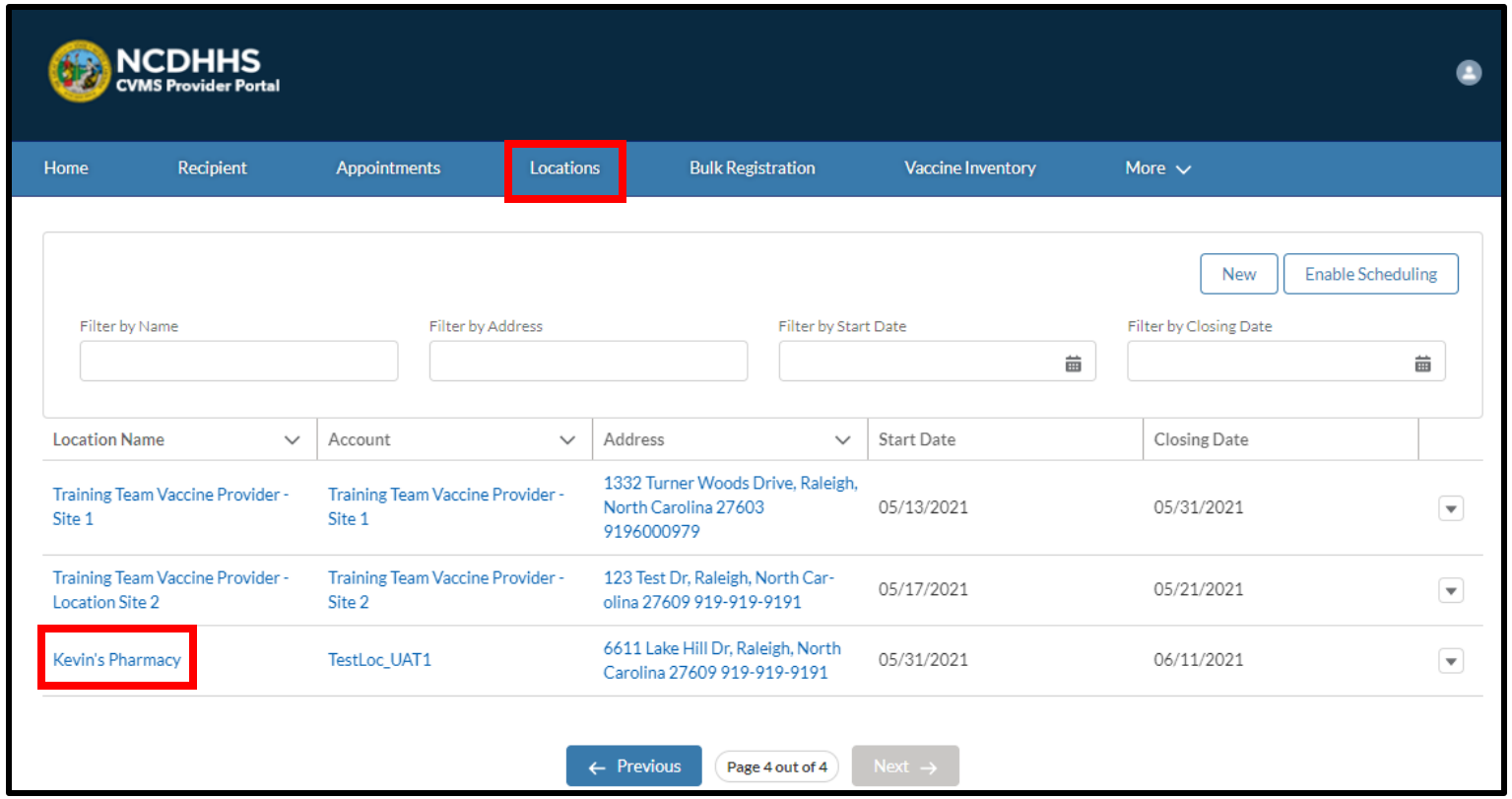
The schedule determines the number of appointment slots. For an appointment to be made, there must be an open appointment slot and available vaccine (appointment) supply.

Create Non-Regular Availability

Step 1 of 4: Navigate to the Location

Set a non-regular availability schedule to create a schedule when your location does not follow the default schedule availability in the case of holiday closure, reduced hours, large vaccination event, or more.

1. Click on the **LOCATION TAB**
2. Click on the **LOCATION NAME** hyperlink



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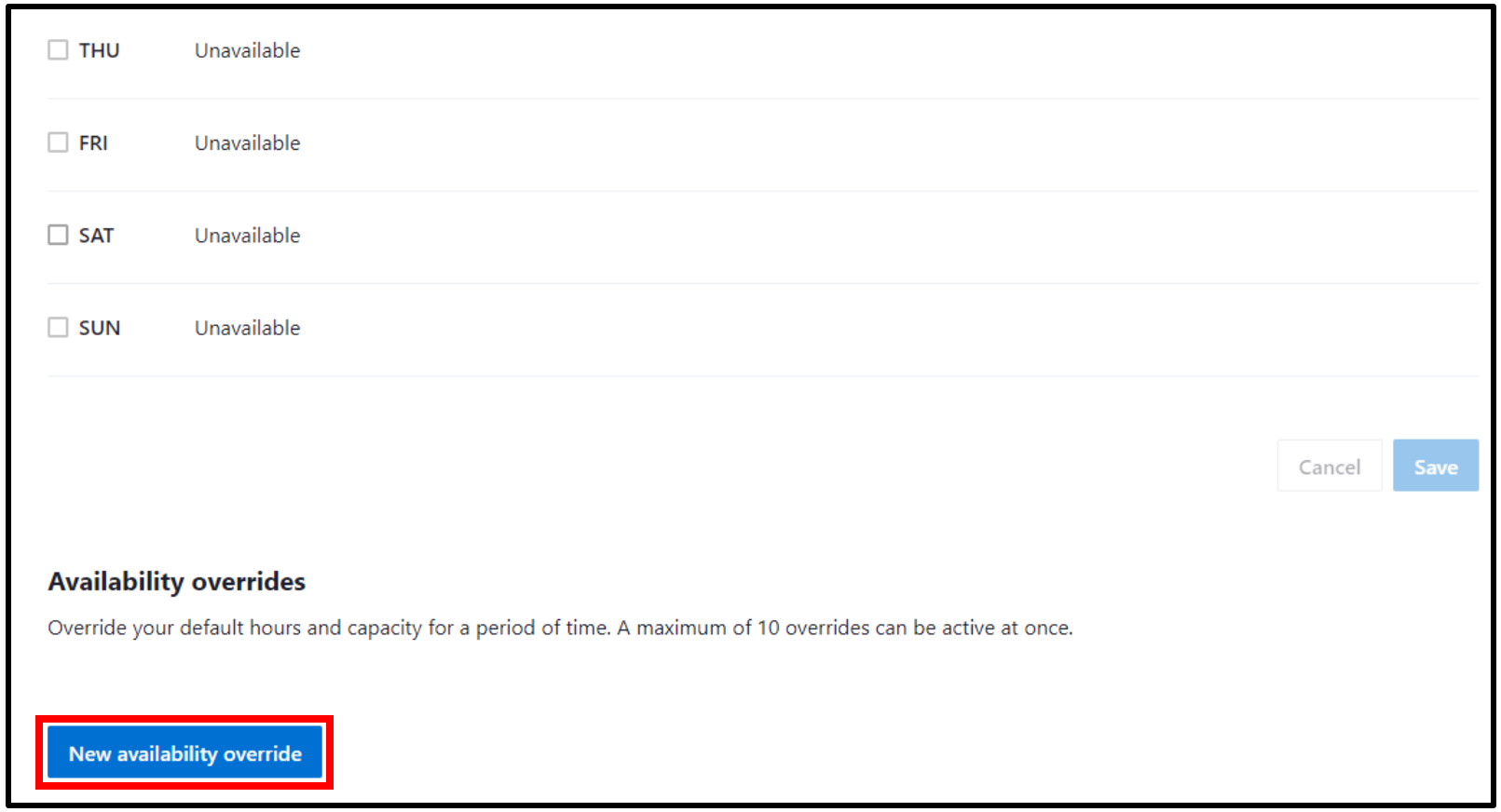
Step 2 of 4: Open the Availability tab

Non-regular availability is set on the Availability tab. The default schedule is at the top. If the location does not follow this schedule, create an **AVAILABILITY OVERRIDE**.

1. Click on the **AVAILABILITY TAB**
2. Scroll-down to the bottom of the page, and click the **NEW AVAILABILITY OVERRIDE** button



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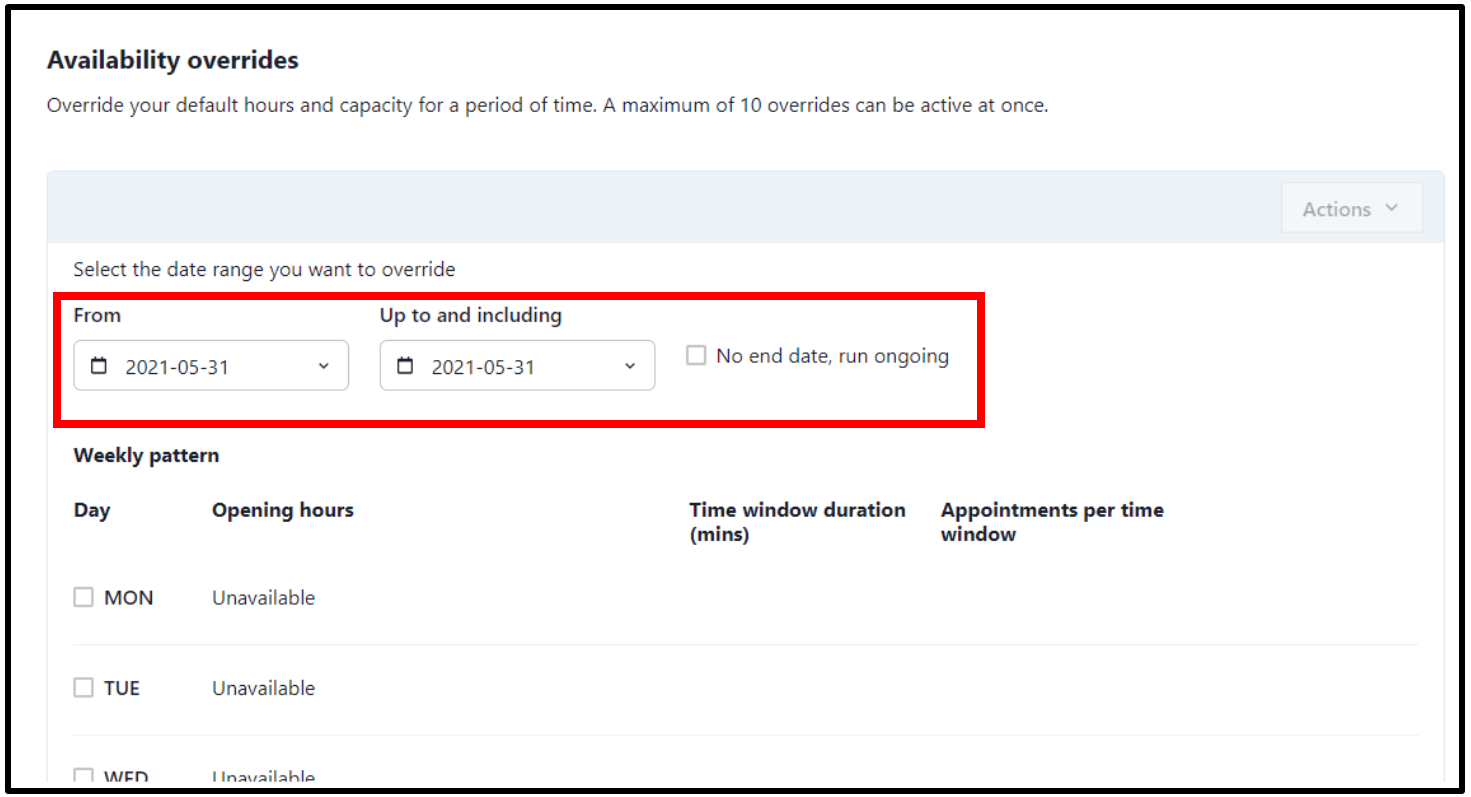
Tips

A location can have up to 10 **AVAILABILITY OVERRIDES**.

Step 3 of 4: Set Override Dates

The Availability Override schedule will override the default schedule availability between the dates that you set.

1. Set the beginning of the Availability Override in the **FROM** field
2. Set the end of the Availability Override in the **UP TO AND INCLUDING** field



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Healthcare Location Manager

Tips

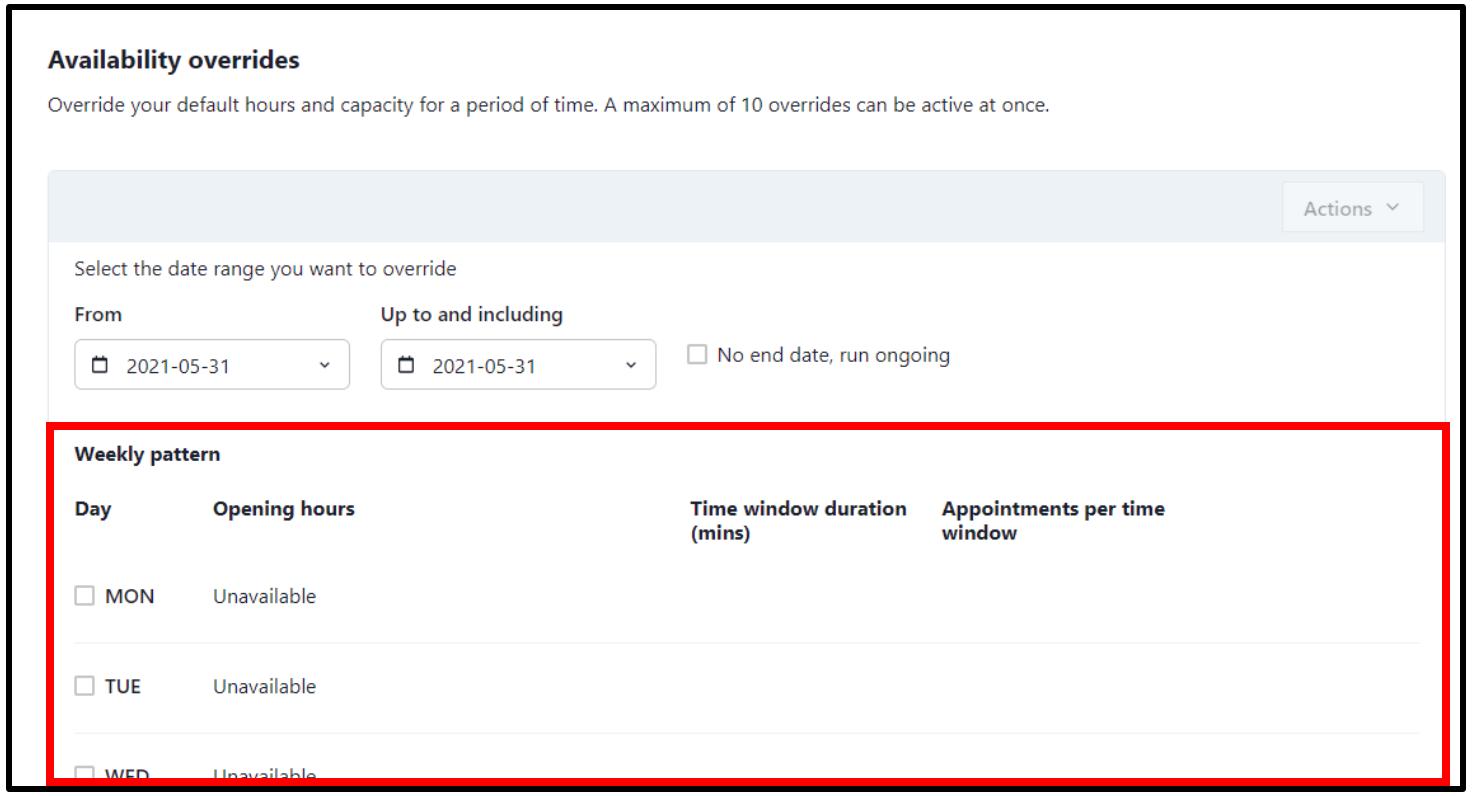
For a single day closure, select the same date in the two date fields FROM and UP TO AND INCLUDING.

If the override does not currently have an end date, select the No end date, run ongoing checkbox

Step 4 of 4: Set Availability Schedule for Override Dates

Create the override availability schedule for the location. See the *Set Weekly Location Schedule for Dose 1 and Dose 2 appointments* section for more information on creating an availability schedule. Note, this schedule will only apply to the location between the availability override dates.

1. Set your override availability schedule
2. Click **SAVE**



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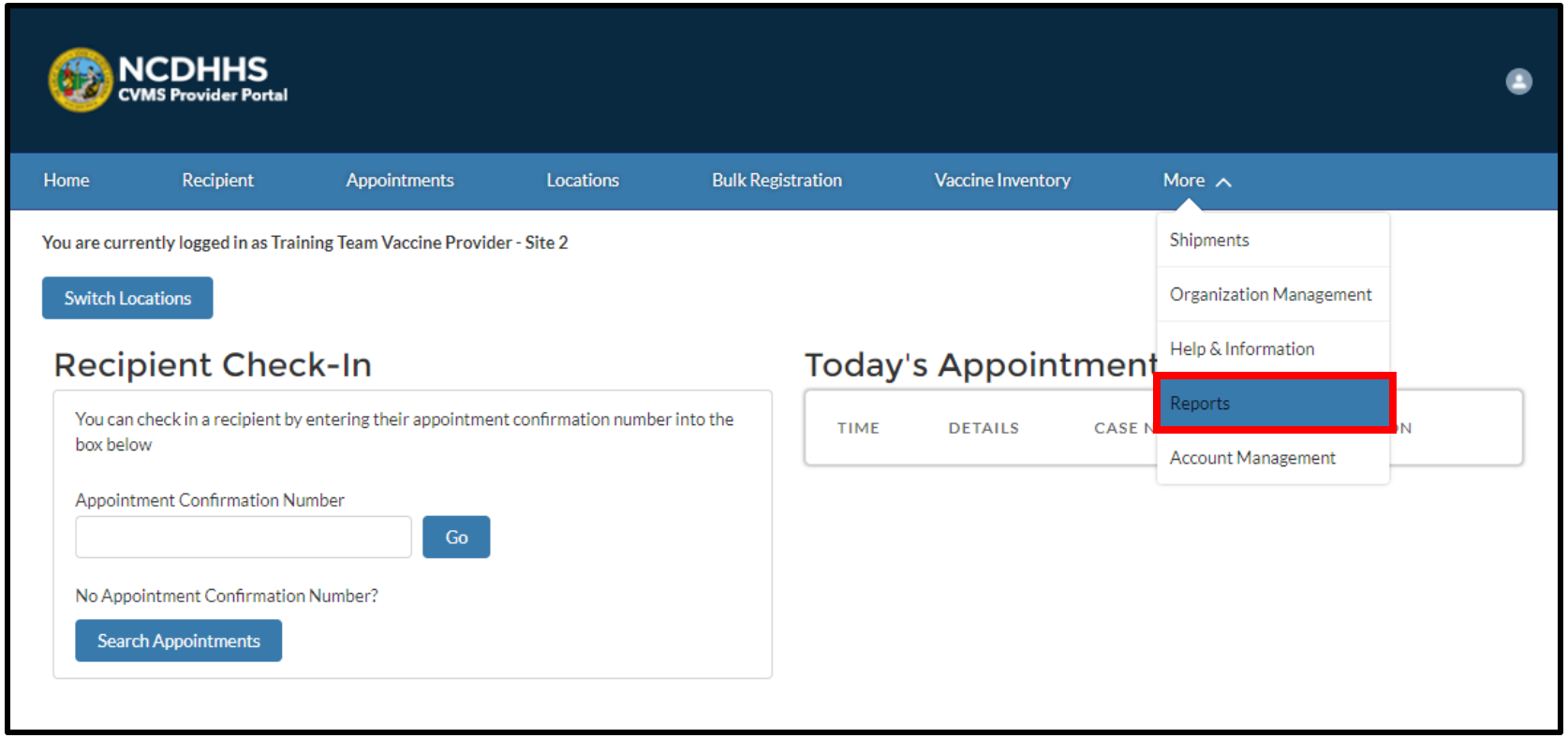
Review Number of Appointments Booked and Remaining Quantity

Step 1 of 3: Navigate to Reports

Once you published your first schedule and received your first appointments, you will need to regularly update the number of 1st Dose appointments released in the system. A report is provided to you to aid you in releasing additional appointments.

1. Click on the **REPORTS** tab



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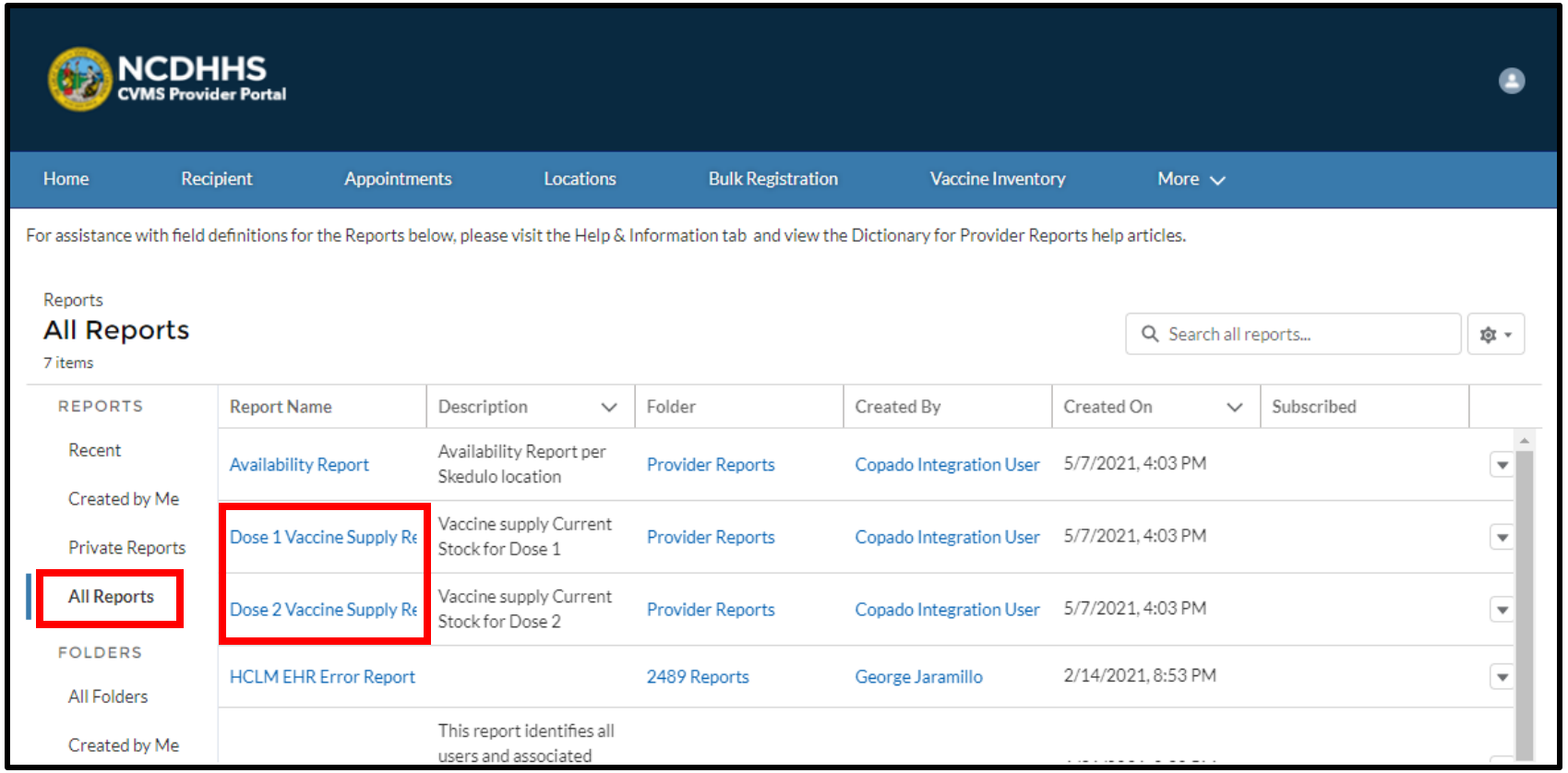
Step 2 of 3: Open Vaccine Supply Report

The **DOSE 1 VACCINE SUPPLY REPORT** and **DOSE 2 VACCINE SUPPLY REPORT** are found in the All-Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

1. Click on the **ALL REPORTS** folder
2. Click on the **DOSE 1 VACCINE SUPPLY REPORT** or **DOSE 2 VACCINE SUPPLY REPORT**



Audience

Healthcare Location Manager

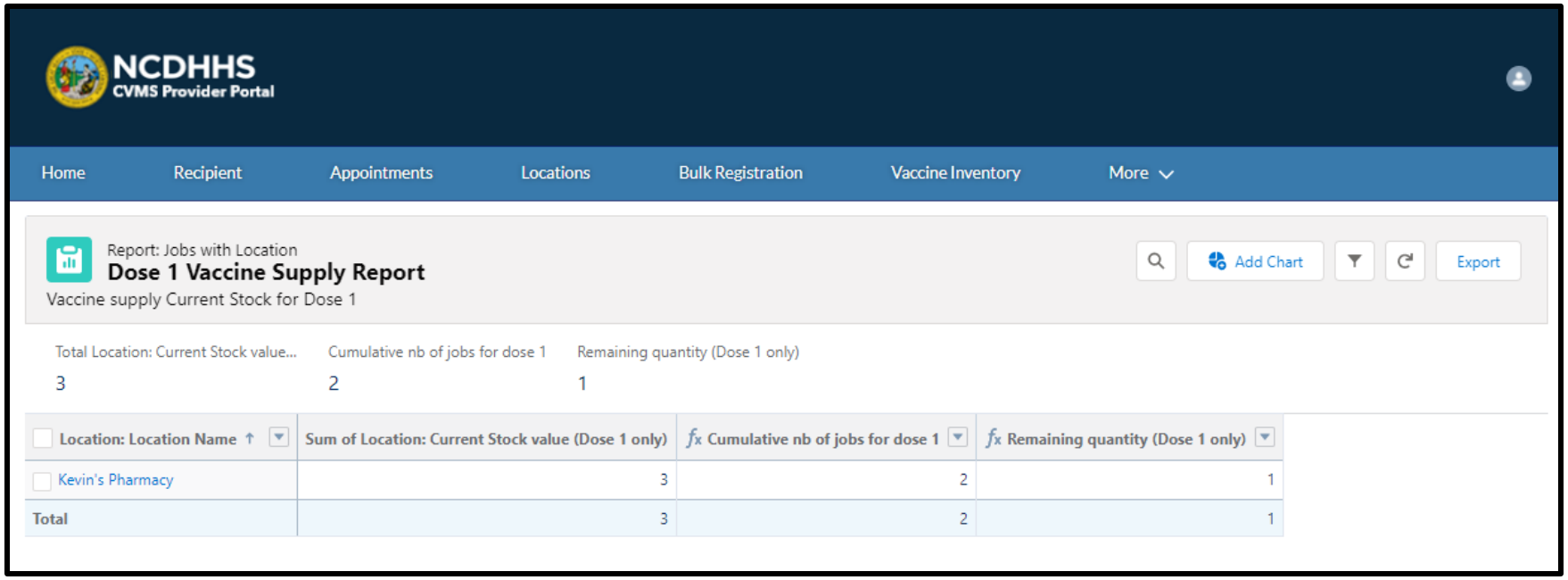
Tips

You will not need to maintain the 2nd Dose Vaccine Supply record once created if you make the Current Stock very large.

Step 3 of 3: Review Vaccine Supply Report

The **VACCINE SUPPLY REPORTS** show you the Current Stock as the location, the number of appointments (jobs) for the relevant dose, and the number of additional appointments that can be booked (remaining quantity). If the **REMAINING QUANTITY** is larger than 0, recipients will be able to book an appointment at this location if there is an available appointment slot. If this number is 0 or less, you must increase the current the Current Stock so that the Remaining Quantity is larger than 0 before additional recipients can book appointments.

1. Review the **REMAINING QUANTITY** and determine how many additional appointments to release
2. Click on the location name hyperlink



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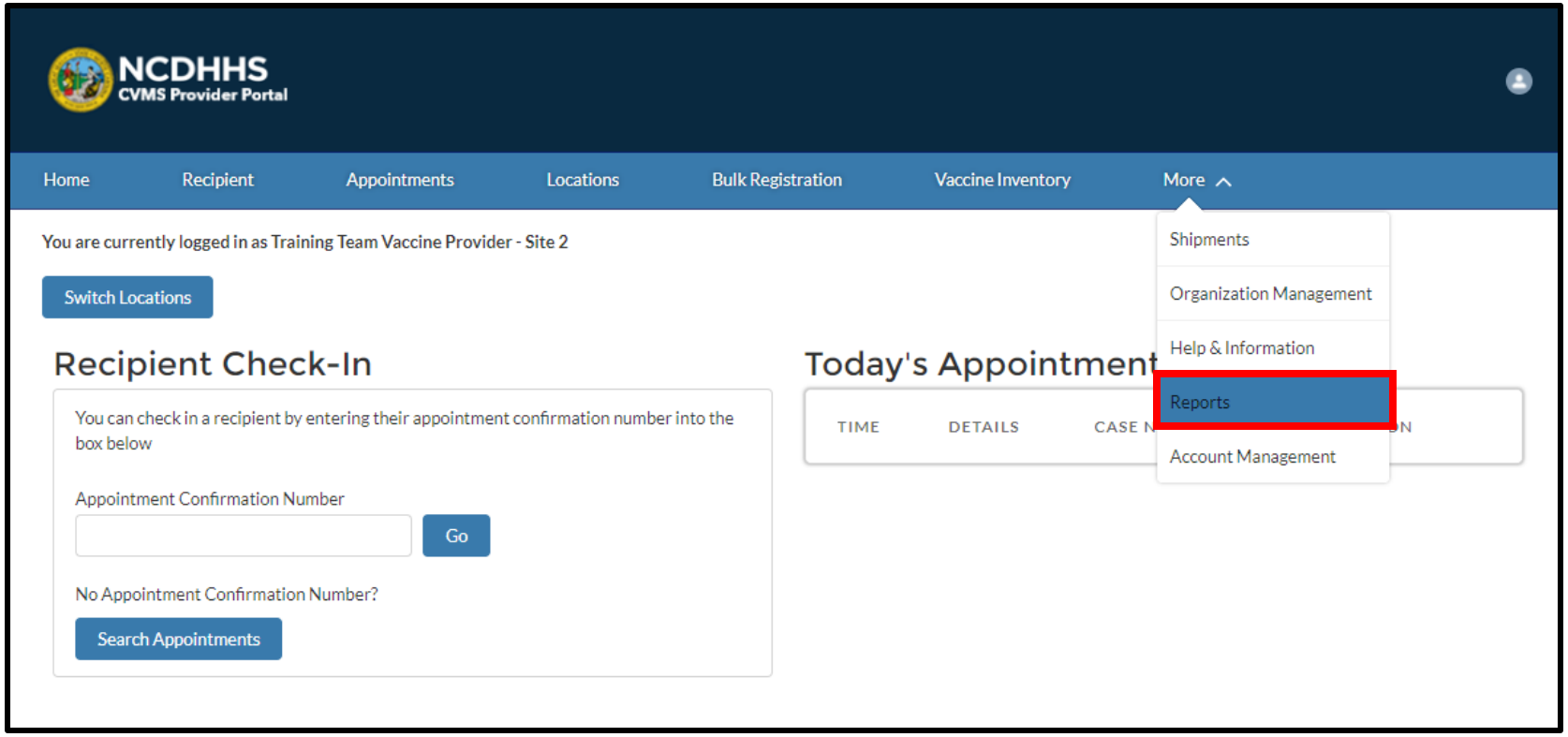
Healthcare Location Manager

Review Availability Report

Step 1 of 3: Navigate to Reports

If you wish to review your location's schedule availability for the next 7 days, the **AVAILABILITY REPORT** will show you the number of appointment slots, booked appointments, and remaining appointments.

1. Click on the **REPORTS** tab



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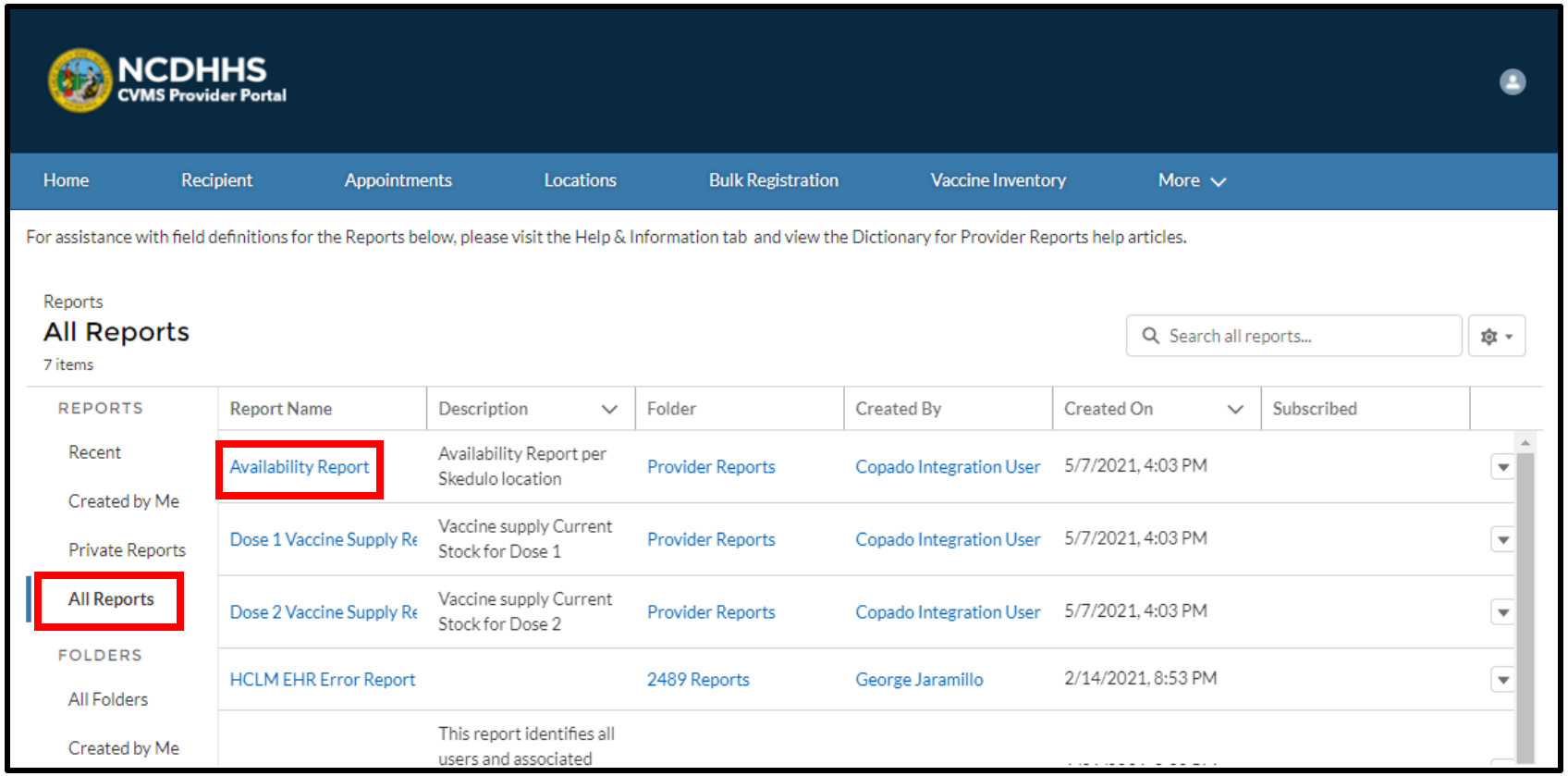
Healthcare Location Manager

Step 2 of 3: Open Availability Report

The **AVAILABILITY REPORT** is found in the All-Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

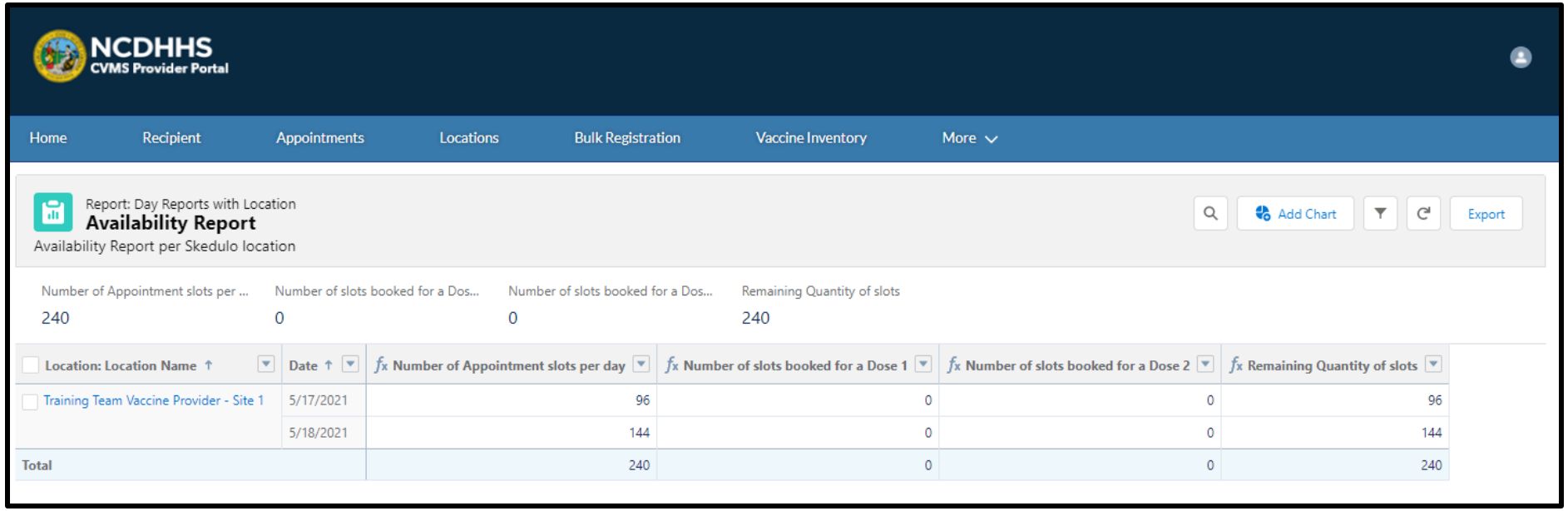
1. Click on the **ALL REPORTS** folder
2. Click on the **AVAILABILITY REPORT**



Audience

Healthcare Location Manager

Step 3 of 3: Review Schedule Availability for the Next 7 Days



- The **AVAILABILITY REPORT** shows the number of appointment slots as defined by the location's availability and the number of appointment slots booked for first and second-dose appointments.
- The availability schedule is shared by first and second-dose appointments.
- Lastly, review the remaining quantity of appointment slots.

You may find that you need to increase availability to allow additional appointments to be booked. See the *Set Weekly Location Schedule for Dose 1 and Dose 2 appointments* section for more information on editing the default availability schedule. See the *Create Non-Regular Availability* section for more information on editing the availability schedule for temporarily editing the availability schedule..

Audience

Healthcare Location Manager

Tips

The Availability Report is updated once daily.

Scheduling from the Perspective of a Recipient

Scheduling from the Perspective of a Recipient

Below are the various activities included in the appointment scheduling process from the perspective of a Recipient.

1. RECIPIENT IDENTIFIES **VACCINE LOCATION ON THE VACCINE SITE LOCATOR WEBSITE** (VACCINES.GOV)
2. RECIPIENT CLICKS ON **CHECK APPOINTMENT AVAILABILITY**
3. RECIPIENT SELECTS LOCATION ON **TAKEMYSHOT**
4. RECIPIENT SELECTS AN **APPOINTMENT SLOT**
5. RECIPIENT ENTERS **PERSONAL DETAILS**
6. RECIPIENT RECEIVES **CONFIRMATION NUMBER**

RECIPIENT AND APPOINTMENT **APPEAR IN COVID-19 VACCINE PORTAL**

RECIPIENT CAN **CANCEL** APPOINTMENT IF NEEDED

Appendix

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	Kristin Clark
3	04/01/2021	• Replaced screen shots to reflect Vaccine Brand field	Kristin Clark
4	04/06/2021	• Updated Recipient Scheduling process	Tabitha McKelvy
5	04/16/2021	• Added updated enable scheduling process • Updated Display on Vaccine Site Locator to dropdown • Added guidance for Location Setting field on location record • Updated guidance on non-regular closures	Kevin Kauffman
6	05/14/2021	• Added non-regular schedule availability support • Included scheduling reports	Kevin Kauffman
7	06/22/2021	• Updated Vaccine Site Locator to be the CDC website, Vaccines.gov • Updated steps for new location creation vaccine supply to edit	Kevin Kauffman
8	06/28/2021	• 29-30: Updated location record screenshots with new field order • 51: Updated recipient appointment scheduling flow	Kevin Kauffman
9	07/27/2021	• New user guide format	Vanessa Kemajou