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

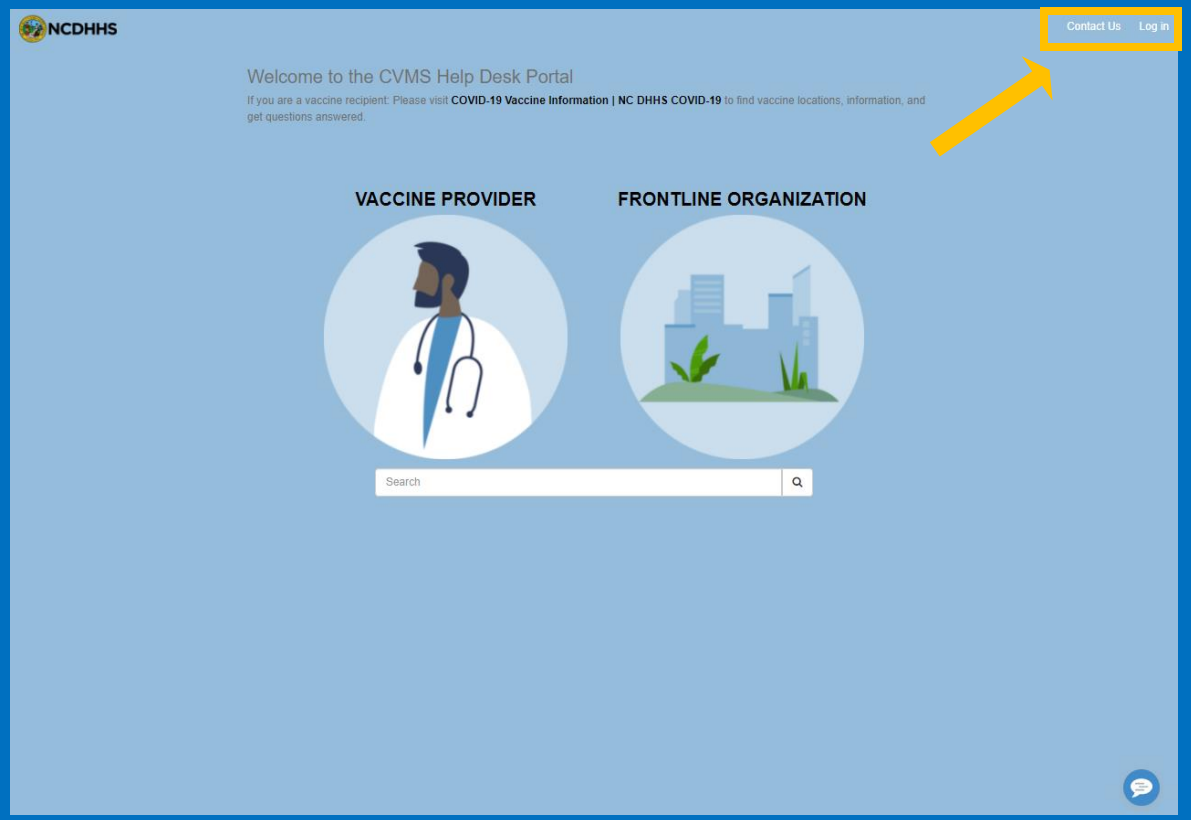
Step 8 - Invite recipients to register in the COVID-19 Vaccine Portal

User Guide

Version 10

August 17, 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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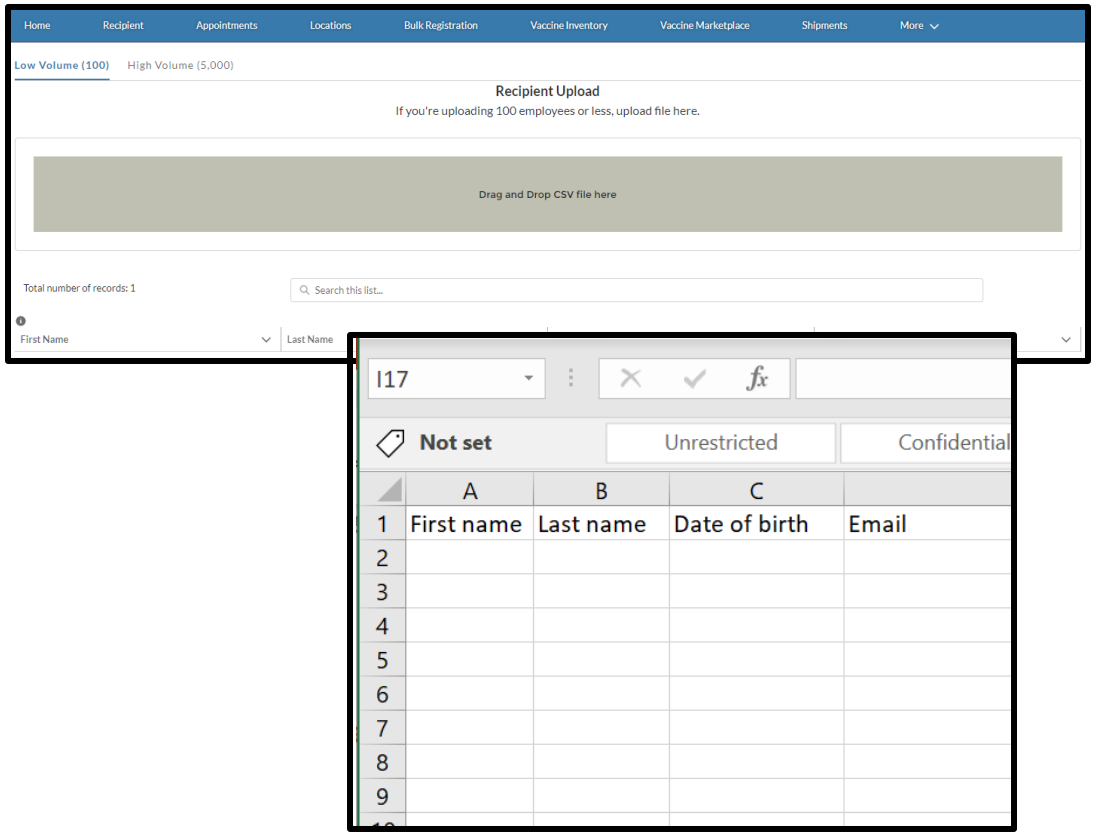
Overview

Overview



As a Healthcare Organization, you can upload recipients' information into the CVMS Provider Portal for them to register in the COVID-19 Vaccine Portal. The intention is to have recipients registering PRIOR their vaccination, saving you some time. However, this step is not necessary if you register them the day of their vaccination instead.

The Recipient Bulk Upload Process is carried out by the **Healthcare Location Manager** profile**.**

And lastly, you will need to:

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

Now, let's get started!

Recipient Bulk Registration Process Overview

1. To get started, Healthcare Organizations go through the Provider Enrollment process to join the NC COVID-19 Vaccine Program via the CVMS Provider Enrollment Portal
2. Organization approved by NCDHHS will then submit its CVMS HCP Users to be onboarded and granted access to the CVMS Provider Portal
3. Healthcare Location Manager completes Recipient Bulk Upload Template with recipients' details
4. Healthcare Location Manager verifies information and saves the file as a .CSV
5. Healthcare Location Manager uploads the Recipient Bulk Upload file and addresses any errors
6. Uploaded Recipient receives email to register in the COVID-19 Vaccine Portal
7. Uploaded Recipient completes registration, and plans vaccination

Registration in CVMS is NOT REQUIRED to receive the COVID-19 vaccine. Your uploaded recipients may contact a participating COVID-19 vaccinating provider to schedule an appointment to receive the COVID-19 vaccine.

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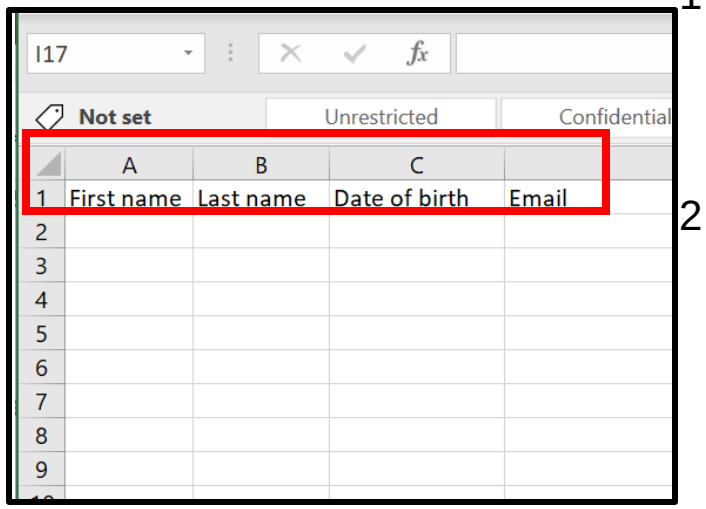
Terminology

CSV File	A type of file saved through Microsoft Excel. To save as CSV file, **select "Save As" → under File Type select ".csv (comma-delimited)"**
Healthcare Organization	**Hospital, medical facility, retail pharmacy, nursing home, etc**. that will be dispensing the COVID-19 vaccine

Complete the Recipient Bulk Upload File

Step 1 of 2: Add Employee or Individual Recipient Data to Recipient Bulk Upload Template

To begin the Recipient Bulk Upload process, you will need to collect information on your recipients. Ensure that legal names and real email addresses are captured.



1. Download the **RECIPIENT BULK UPLOAD TEMPLATE** file from the NC Immunization Branch Training page for COVID-19 vaccine providers: https://immunize.nc.gov/providers/covid-19training.htm
2. Enter the following information in the template:
   - First Name
   - Last Name
   - Date of Birth (in MM/DD/YYYY format)
   - Email Address

Note:

- *You may load files with a maximum of 100 Recipient records using the Low Volume tab.*
- *You may load files with a maximum of 5,000 Recipient records at a time using the High Volume tab.*
- *Special characters will not be accepted and will result in failure to create the Recipient's record*

***DO NOT** create any files with more than 5,000 Recipient records.*

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Tips

If your Recipients do not have a valid email address or do not want to register, they should schedule an appointment with an enrolled COVID-19 vaccinating provider.

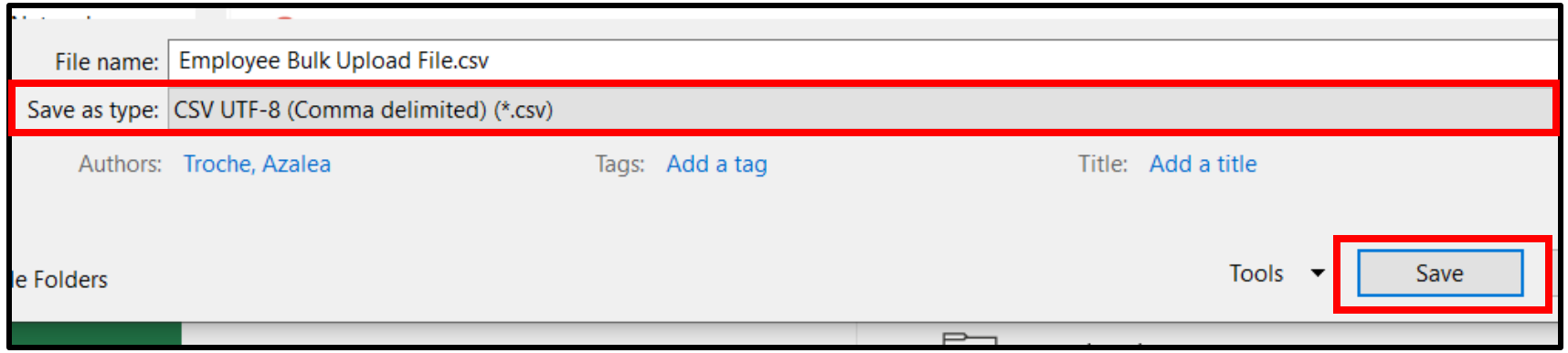
They can go to can go to https://covid19.ncdhhs.gov/findyourspot to see a list of vaccinating providers.

Step 2 of 2: Verify & Save Data to Upload File

You are now ready to **REVIEW ALL REQUIRED EMPLOYEE/RECIPIENT DATA** that you have entered and **SAVE THE FILE AS A .CSV FILE**.

To change an EXCEL file to a .CSV file,

1. Click the **FILE** button
2. Click **SAVE AS**
3. **ENTER A FILE NAME** (no file name requirements)
4. For file type, select **CSV (comma-delimited) (*.csv)**
5. Click **SAVE**



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Upload your file template

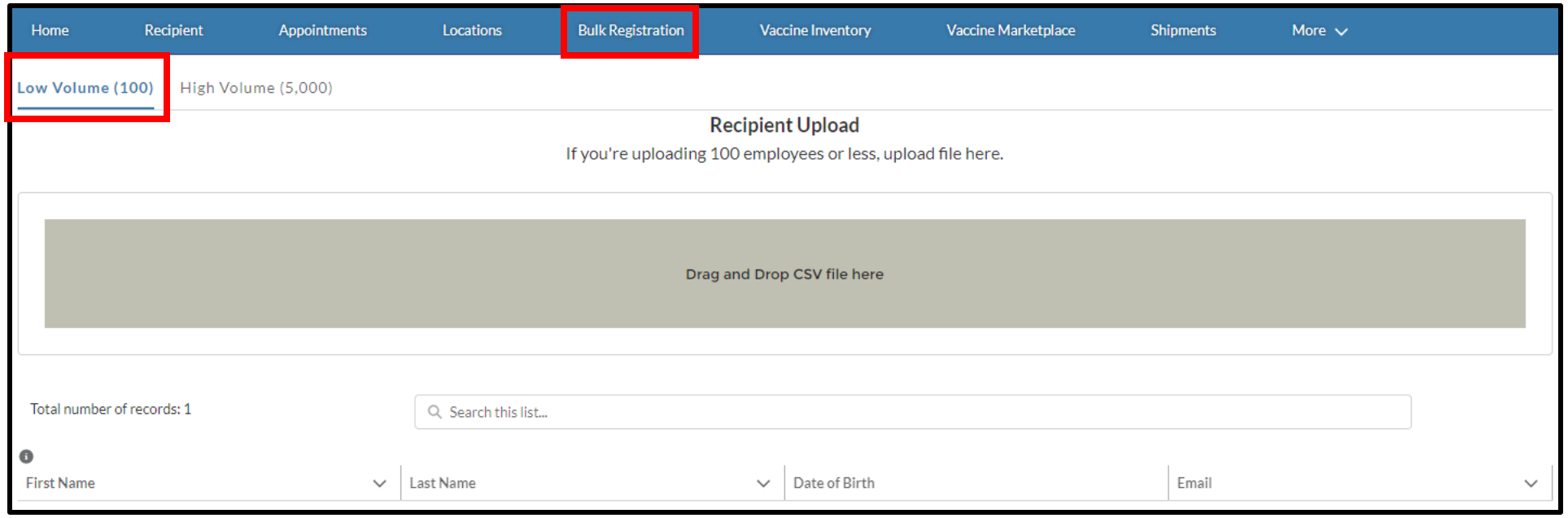
Upload a Low Volume File (100 or fewer recipients at a time)

Step 1 of 4: Select the Low Volume tab for 100 or fewer records

If you have 100 or fewer records to upload, start by selecting the **LOW VOLUME TAB**.

We recommend using this method as it will be faster. If you have several hundred employees, you can create multiple files of 100 or fewer records to upload individually.

1. At the top of your Homepage, navigate to the **BULK REGISTRATION TAB**
2. Select the **LOW VOLUME** tab



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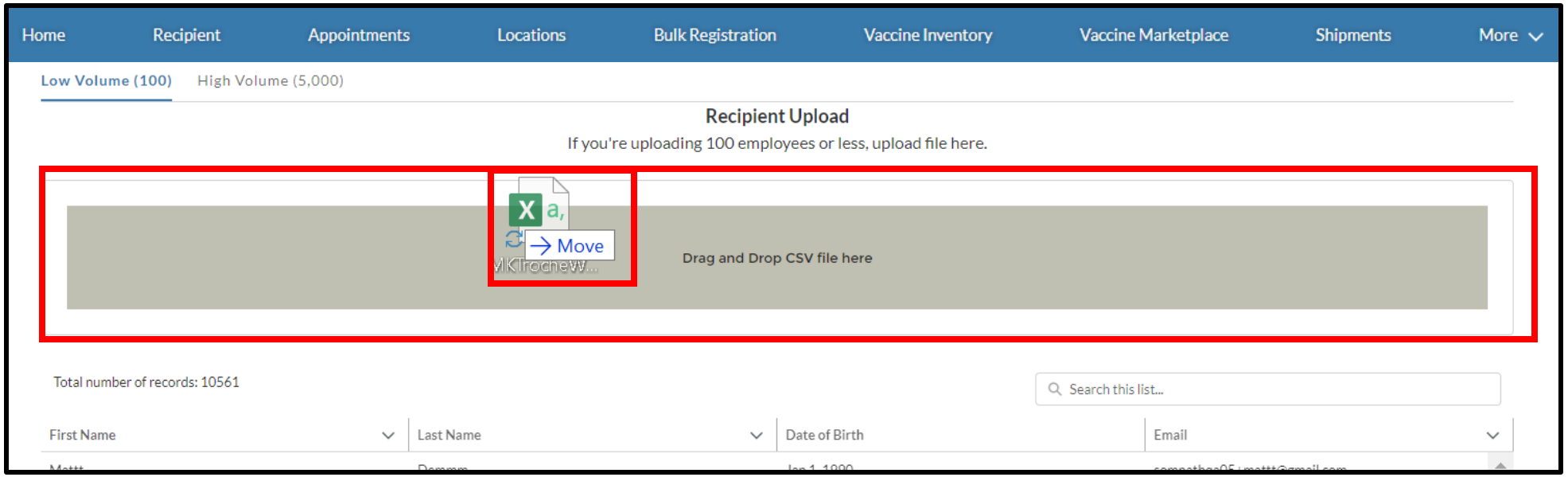
Step 2 of 4: Uploading the Recipient Bulk Upload File with the Low Volume Tab

When you upload your Recipient Bulk Upload File using the Low Volume tab, you will be able to review your data before creating the records.

1. Drag and drop your file to the **DRAG AND DROP CSV FILE HERE** area
2. Your data will appear directly below



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Tips

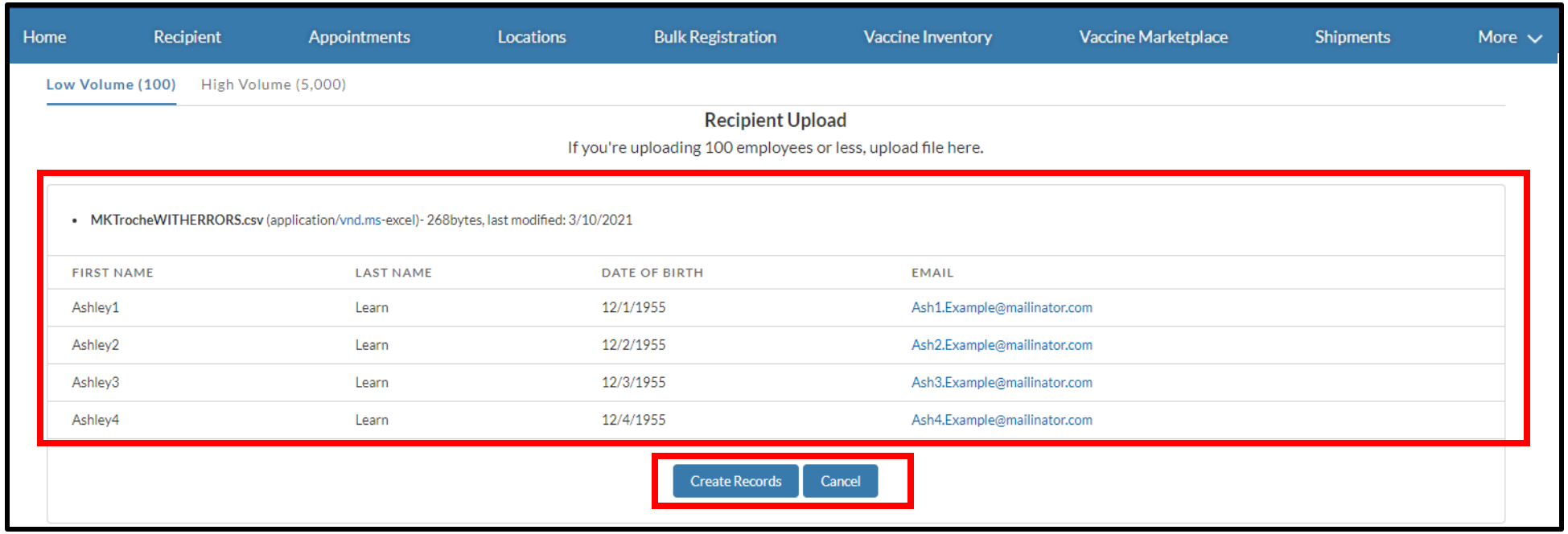
Remember, you can only upload a maximum of 100 recipient records at a time using the Low Volume tab.

For instructions on using the High Volume tab, skip to the next section.

Step 3 of 4: Review Your Data in the Low Volume Tab

Once you upload your file, review your data. Please correct any errors before creating your records.

1. **REVIEW** the uploaded data
2. If you find errors or missing information, click **CANCEL**
   - *Clicking **CANCEL** removes the file*
3. If the data looks correct, click the **CREATE RECORDS** button



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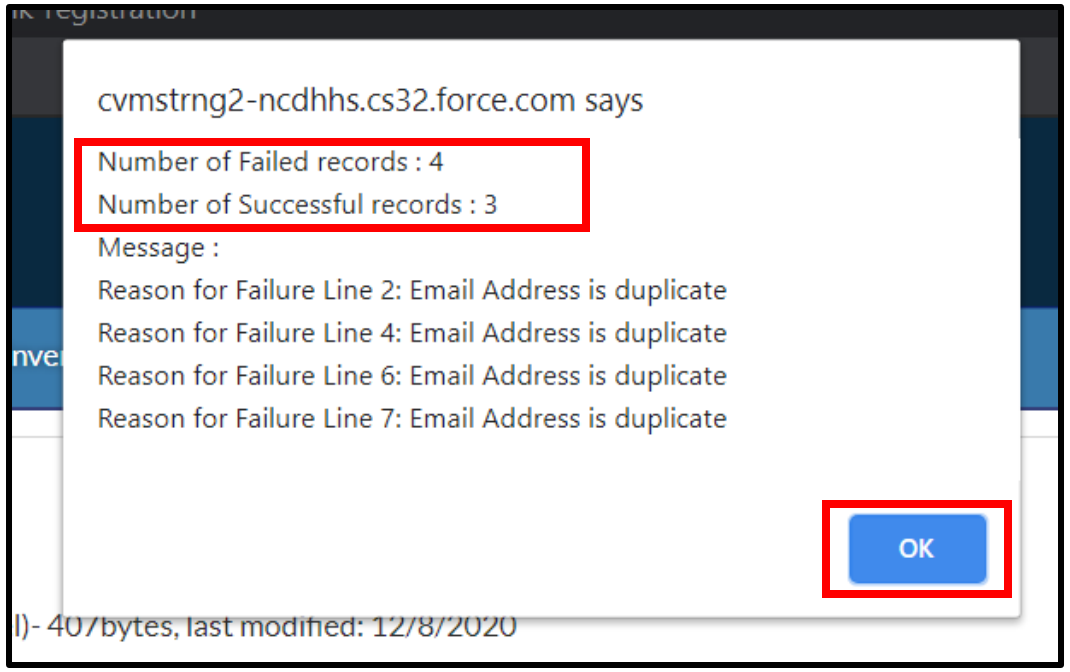
Step 4 of 4: Review Successful and Failed Record Alert Message

After creating the records using the **LOW VOLUME TAB**, you will see an **ALERT MESSAGE** appear. The message will state the number of **SUCCESSFUL** recipient uploads and number of **FAILED** recipient uploads.

Once you click **OK**, the recipients who were successfully loaded will **RECEIVE AN AUTOMATIC EMAIL NOTIFICATION** allowing them to **REGISTER** to the **COVID-19 VACCINE PORTAL.**

*We will cover how to manage **FAILED RECIPIENT UPLOADS** in the **VIEW AND RE-UPLOAD FILE SECTION.***



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Tips

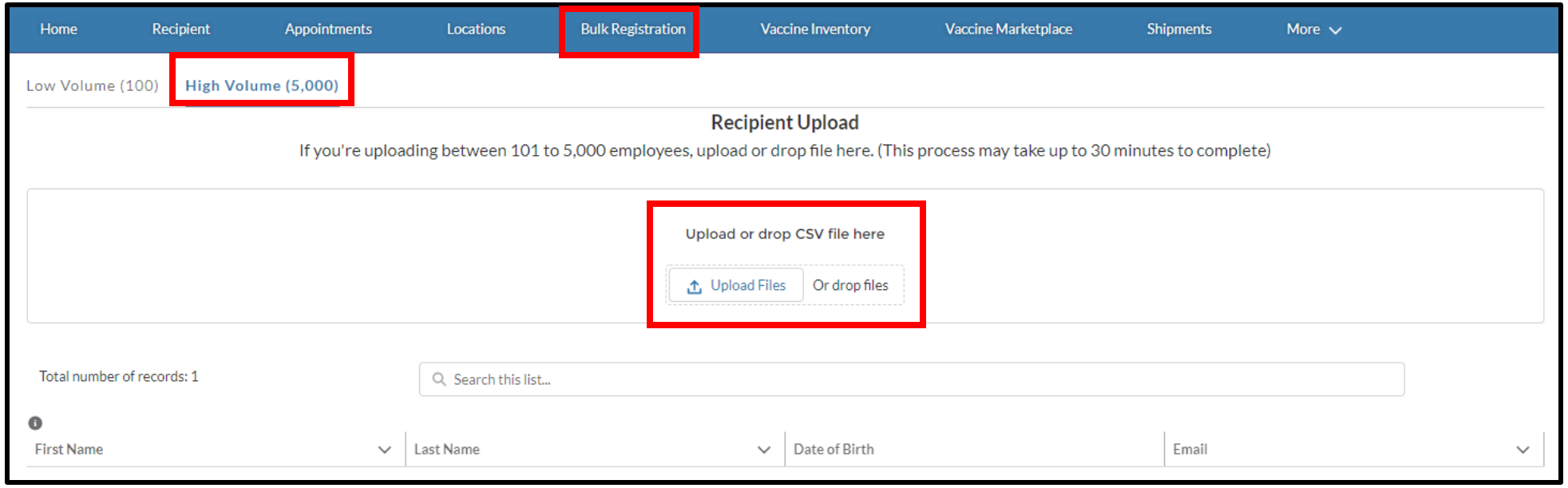
You can view all uploaded recipients in the CVMS Provider Portal.

Upload a High Volume File
(More than 100 recipients at a time)

Step 1 of 4: Select the High Volume tab for more than 100 records

If you have a significant number of records to upload at once (over 100 records, but less than 5,000), you will need to use the High Volume process.

1. Click the **High Volume TAB**
2. Click **UPLOAD FILE**
3. Select a file **FROM YOUR DESKTOP**



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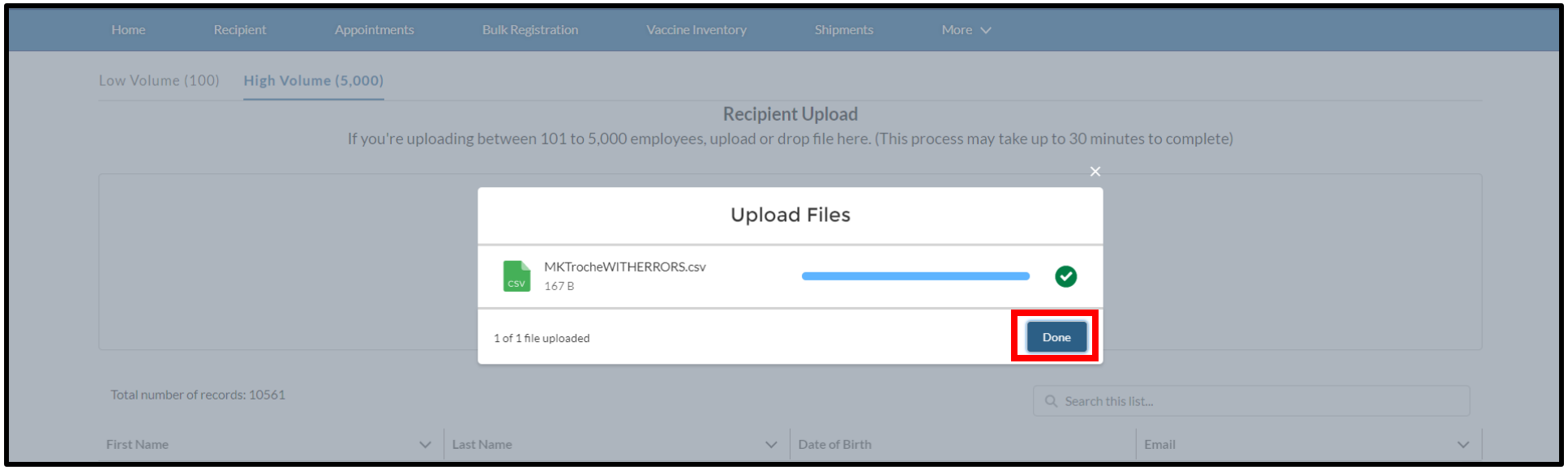
Step 2 of 4: While Your High Volume Recipient Bulk Upload is Processing

Unlike the Low Volume process, the content of your file will not appear on the screen prior to completion of your file's upload.

Also worth noting, larger files will take longer to upload. While CVMS processes your upload, you will be able to leave the page and it will continue processing in the background.

If the upload process for High Volume gives an error, use the Low Volume tab instead

1. Click **DONE** once the Upload is complete



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Tips

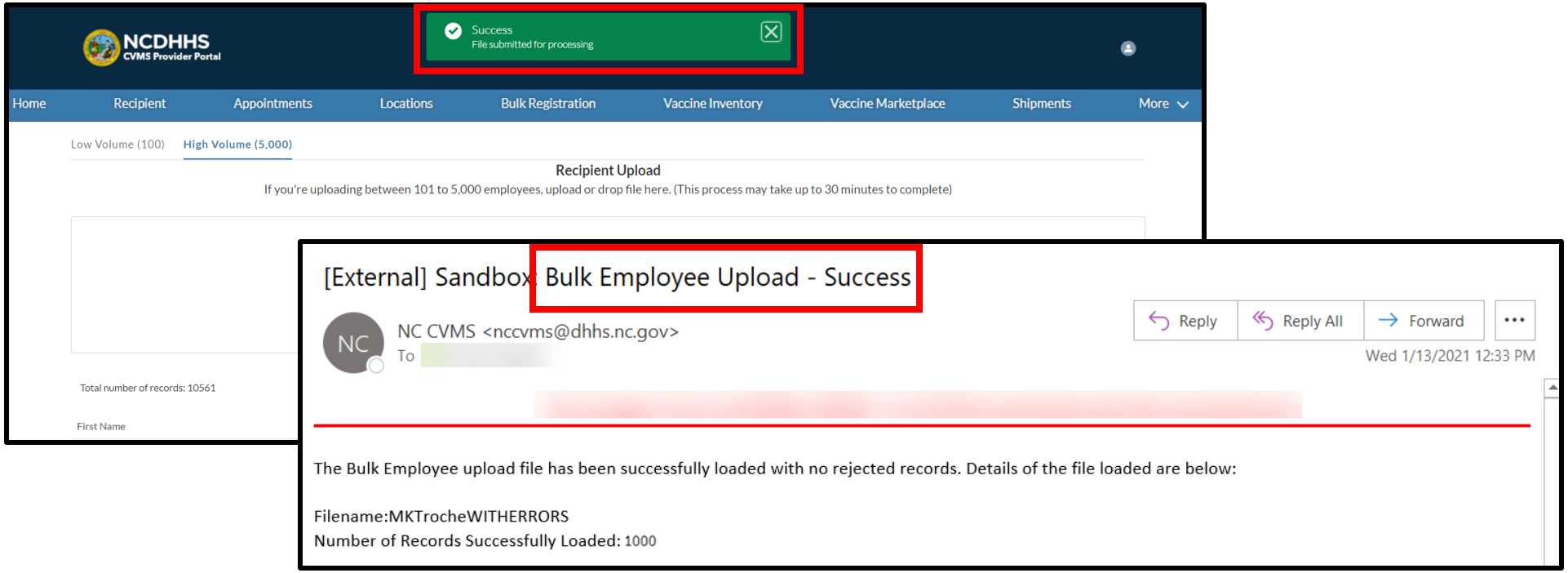
This process may take up to 30 minutes to complete.

Step 3 of 4: Successful High Volume Recipient Bulk Upload

Once your file is successfully uploaded, you will see a **SUCCESS BANNER** appear at the top of the page. You will also receive an automatic email notification.

If all your recipient records were successfully created, you will receive an email notification with the number of successfully created records.

Successfully loaded recipients will **RECEIVE AN AUTOMATIC EMAIL NOTIFICATION** allowing them to **REGISTER** in the **COVID-19 VACCINE PORTAL.**



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Step 4 of 4: Failed High Volume Recipient Bulk Upload

If there were any errors in your file upload, you will receive an email notification with a summary of **SUCCESSFUL AND FAILED RECORDS**. In the next section, we will cover how to manage failed recipient uploads.

Only successfully loaded recipients will **RECEIVE AN AUTOMATIC EMAIL NOTIFICATON** allowing them to **REGISTER** in the **COVID-19 VACCINE PORTAL.**

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View and Re-Upload File Errors

Step 1 of 3: Receive Email with Upload File Errors

If any recipient records included in your recipient bulk upload failed to upload, you should **AUTOMATICALLY RECEIVE AN EMAIL** from the CVMS Provider Portal.

The attachment included in the email will **CONTAIN THE FAILED RECORDS** in the same recipient bulk upload format. It will also include an additional column with the **REASON FOR FAILURE**.

1. **OPEN THE EMAIL**
2. **OPEN THE EXCEL ATTACHMENT** in the email

Not set | Unrestricted | Confidential | Highly Confidential | Restricted

	A	B	C	D	G
1	FirstName	LastName	Date of birth	Email	Error
2	Nicholas		12/2/1955	Nicholas.NoEmail@companyemail2.com	Line 2: Required fields are missing: [LastName]
3	Nicholas	TestLoadE2Recip3	12/3/1955	Nicholas.NoEmail@companyemail3.com	Line 3: Email: invalid email address: Duplicated Nicholas.NoEmail@companyemail3.com
4	Nicholas			Nicholas.NoEmail@companyemail4.com	Line 4: Required fields are missing: [Date of birth]
5	Nicholas	TestLoadE2Recip5	12/5/1955	bademail	Line 5: Email: invalid email address: bademail
6	Nicholas	TestLoadE2Recip6	12/6/1955		Line 6: Required fields are missing: [Email]
7	Nicholas	TestLoadE2Recip7	12/7/1955	Nicholas.NoEmail@	Line 8: Email: invalid email address: Nicholas.NoEmail@
8	Nicholas	TestLoadE2Recip8	12/8/19555	Nicholas.NoEmail@companyemail8.com	Line 8: Date of birth: invalid Date of birth: 12/8/19555
9					

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Tips

You will receive an email with any failed uploads, whether you use the Low Volume or High Volume tab.

Step 2 of 3: Fix File Errors

Inside the attachment is a list of recipients records that failed to load into the system.

No successfully loaded recipients will be included in this list.

1. In the attached Excel file, find the column **ERROR**
2. Use the **ERROR** field to identify the issue and **CORRECT THE DATA IN THE SAME SHEET**

Not set | Unrestricted | Confidential | Highly Confidential | Restricted

	A	B	C	D	E
1	FirstName	LastName	Date of birth	Email	Error
2	Nicholas		12/2/1955	Nicholas.NoEmail@companyemail2.com	Line 2: Required fields are missing: [LastName]
3	Nicholas	TestLoadE2Recip3	12/3/1955	Nicholas.NoEmail@companyemail3.com	Line 3: Email: invalid email address: Duplicated Nicholas.NoEmail@companyemail3.com
4	Nicholas			Nicholas.NoEmail@companyemail4.com	Line 4: Required fields are missing: [Date of birth]
5	Nicholas	TestLoadE2Recip5	12/5/1955	bademail	Line 5: Email: invalid email address: bademail
6	Nicholas	TestLoadE2Recip6	12/6/1955		Line 6: Required fields are missing: [Email]
7	Nicholas	TestLoadE2Recip7	12/7/1955	Nicholas.NoEmail@	Line 8: Email: invalid email address: Nicholas.NoEmail@
8	Nicholas	TestLoadE2Recip8	12/8/19555	Nicholas.NoEmail@companyemail8.com	Line 8: Date of birth: invalid Date of birth: 12/8/19555
9					

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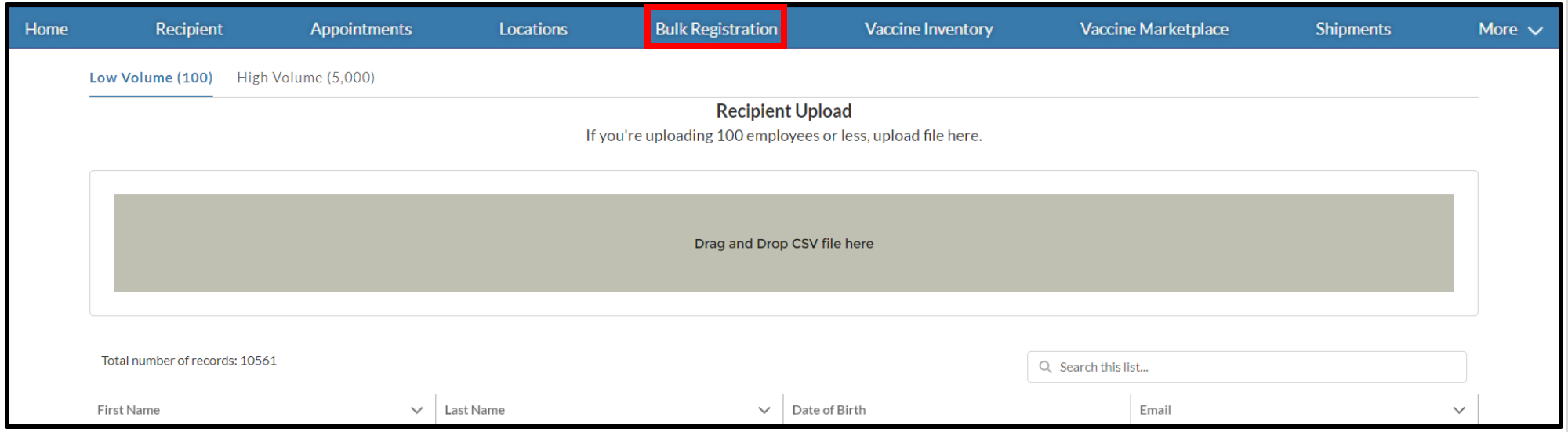
Step 3 of 3: Save and Re-Upload the Updated Recipient Bulk Upload File

Once you review and correct any recipient data errors, you are ready to **RE-UPLOAD THE UPDATED FILE**. Most of the time you will have less than 100 errors to correct, so you can re-upload your file using the Low Volume tab.

1. On the same sheet where you made your updates, **DELETE** the **ERROR COLUMN**
2. **SAVE** the file as a **.CSV**
3. Navigate to the **BULK REGISTRATION** tab
4. Upload your file using the **LOW VOLUME** or **HIGH VOLUME** tab



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Tips

Remember, the only columns that should be listed in your file are First Name, Last Name, and Email address.

Fix File Errors – Potential Reasons for Failure

There are a few reasons why a recipient record may fail to be uploaded – from blank fields to invalid data formats.

Potential Error Messages:

1. **EMAIL ADDRESS IS DUPLICATE:**
   - Meaning: The email address you attempted to upload was already found in the system under the same first name, last name, and Date of birth. CVMS does not require a unique email for each recipient, but the system will check the first name, last name, and DOB to see if it's a duplicate.
2. **FIRST & LAST NAME CANNOT BE EMPTY:**
   - Meaning: A name value was not entered.
3. **INVALID CHARACTERS:**
   - Meaning: A name field contained special characters.
4. **INVALID EMAIL ADDRESS:**
   - Meaning: An invalid email address was submitted. CVMS looks for @ sign in email field.

     Note: The EMAIL field can be left blank but if populated, it must be a proper address
5. **DATE OF BIRTH CANNOT BE BLANK**
   - Meaning: A Date of birth value was not entered.
6. **INVALID DATE OF BIRTH**
   - Meaning: An invalid Date of birth was submitted. CVMS only accepts mm/dd/yyyy date of birth format.

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View Uploaded Recipient Records

View Uploaded Recipient Records

You will be able to **REVIEW YOUR LOADED RECIPIENTS** who are in the CVMS Provider Portal via the **BULK REGISTRATION TAB.**

1. From your home page, navigate to the tab **BULK REGISTRATION**
2. Locate the table of **LOADED RECIPIENTS**
3. You can **SEARCH LOADED RECIPIENTS** by **FIRST NAME AND LAST NAME** in the list view search bar
4. You can also **SORT** the list of recipients by clicking on the **COLUMN NAME**

Total number of records: 10561

Search this list...

First Name	Last Name	Date of Birth	Email
Mattt	Demmm	Jan 1, 1990	somnathqa05+mattt@gmail.com
Tej19820	Par19820	Mar 8, 2000	tejparey+fortej19820@gmail.com
Tej19821	Par19821	Mar 8, 2000	tejparey+fortej19821@gmail.com
Tej19822	Par19822	Mar 8, 2000	tejparey+fortej19822@gmail.com
Tej19823	Par19823	Mar 8, 2000	tejparey+fortej19823@gmail.com
Tej19824	Par19824	Mar 8, 2000	tejparey+fortej19824@gmail.com
Tej19825	Par19825	Mar 8, 2000	tejparey+fortej19825@gmail.com

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Tips

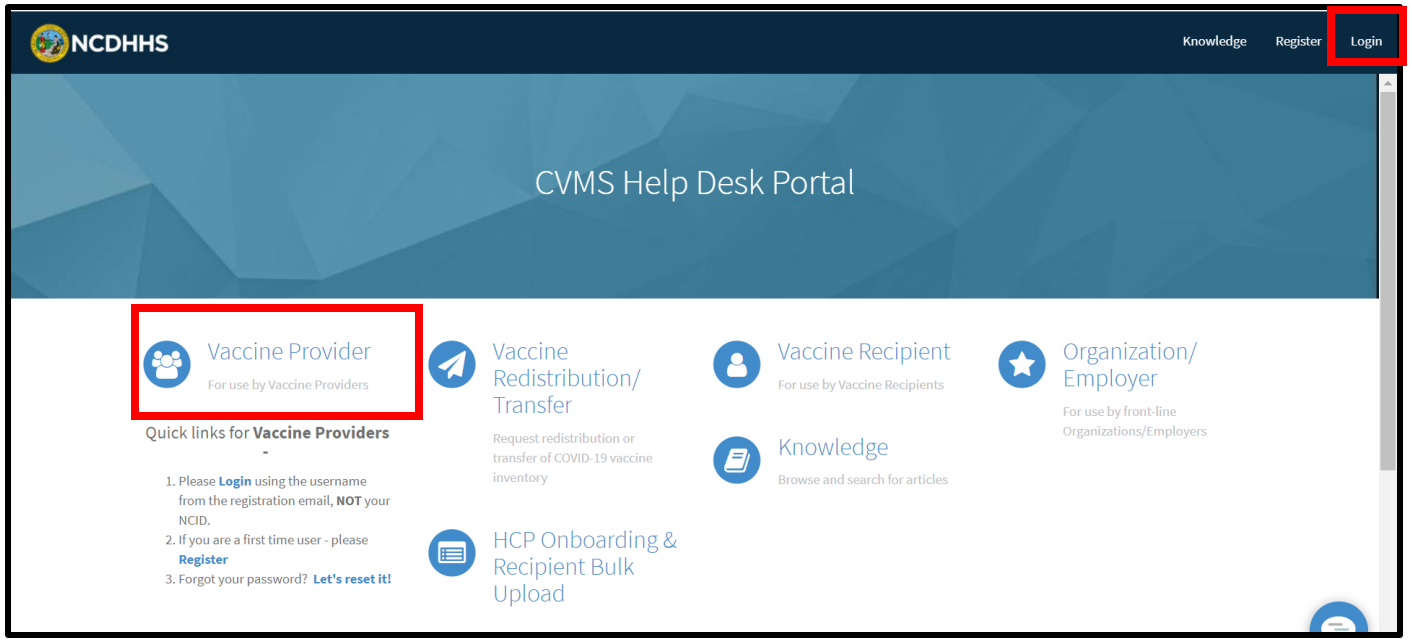
All loaded recipients will also be searchable from the Recipient tab in the CVMS Provider Portal.

How to Remove Loaded Recipients

Remember, all successfully loaded recipients will automatically be sent an email with their COVID-19 Vaccine Portal username and a link to access the COVID-19 Vaccine Portal to complete their account set-up and registration.

You **CANNOT DELETE YOUR LOADED RECIPIENTS.** If you need to remove an uploaded recipient,

1. Navigate to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine
2. Log in the system
3. Click on **VACCINE PROVIDER**
4. Fill the Intake form and submit a request to remove the recipient from CVMS.



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Next Actions for Uploaded Recipients

Step 1 of 3: CVMS COVID-19 Portal Email Notification

From: **Vaccine Management System** <nccvms@dhhs.nc.gov>
Date: Thu, Feb 4, 2021 at 6:58 PM
Subject: Welcome to the North Carolina COVID-19 Vaccine Portal
To: nichelle.testing@gmail.com <nichelle.testing@gmail.com>

Welcome to the COVID-19 Vaccine Portal

Dear Recipient TestLast2100,

You are receiving this email because your health care provider or employer pre-registered you to receive a COVID-19 vaccine or you provided your email when you received a COVID-19 vaccine from a North Carolina provider.

To access the COVID-19 Vaccine Portal, please click here to create your password. Once you have set-up your password, you will be able to complete the vaccine registration. After you register, you will see which vaccine group you are in and which groups are currently being vaccinated. You will also be able to receive a reminder to get your second dose and access your vaccine record.

You can access the COVID-19 Vaccine Portal anytime at: https://covid-vaccine-portal.ncdhhs.gov

You will need your username each time you log in.
Username: nichelle.testing@gmail.com.covid19vaccine

Need support? Submit your question to the help desk here: Submit Ticket
You may also call the COVID-19 vaccine help center at (888)-675-4567, Monday through Friday from 7 a.m. until 7 p.m., and on Saturday and Sunday from 8 a.m. until 4 p.m.

Visit YourSpotYourShot.nc.gov for accurate information about the COVID-19 vaccine. To slow the spread of COVID-19 and save lives, continue to practice the 3 Ws - wear a mask, wait six feet apart, wash your hands - until most people have a chance to get vaccinated.

Thank you for helping to protect your family and neighbors from COVID-19.

NC Department of Health and Human Services
Division of Public Health

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Once successfully loaded into the CVMS Provider Portal, an **AUTOMATIC EMAIL NOTIFICATION** will be sent to each recipient.

The email will come from:

Vaccine Management System nccvms@dhhs.nc.gov

Email Subject: Welcome to the North Carolina Vaccine Management COVID-19 Vaccine Portal

This **EMAIL CONTAINS A LINK TO SETUP YOUR PASSWORD.** Your **CVMS COVID-19 Vaccine Portal USERNAME** is listed in the email.

1. Click the **LINK** in the email
2. The password setup page appears, follow the instructions to create your password

NOTE: A COVID-19 Vaccine Portal Account is **NOT REQUIRED** to **RECEIVE A COVID-19 VACCINE.** If a recipient does not have a valid email address or does not want to register, they can check their Vaccine Group and schedule an appointment with a vaccine provider. They can go to can go to https://covid19.ncdhhs.gov/findyourspot to find participating COVID-19 vaccinating providers.

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Tips

Inform your employees to allow incoming emails from nccvms@dhhs.nc.gov.

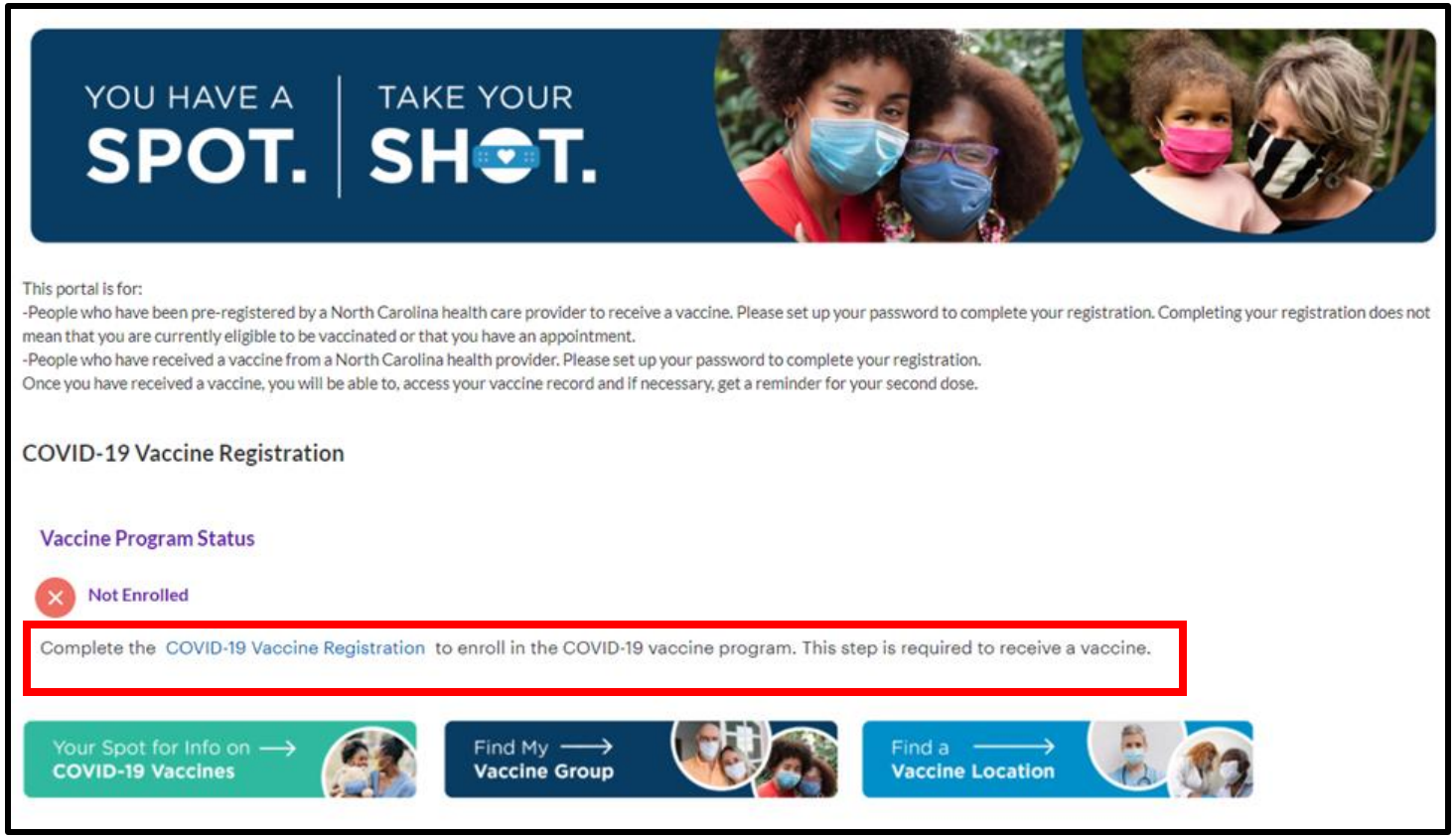
Step 2 of 3: CVMS COVID-19 Vaccine Portal Password Reset & Username

By clicking on the link inserted in the email notification will prompt recipients to:

1. Type their **USERNAME**

   The COVID-19 Vaccine Portal Username has .**COVID19VACCINE** added to the end of the email address they provided

2. Set their **PASSWORD**, they will then be prompted to the portal home page
3. Click on **COVID-19 Vaccine Registration**



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Tips

If a recipient forgets their password, they can click on Forgot password. A new email with a link to reset the password will be sent to the email address on file.

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Step 3 of 3: CVMS COVID-19 Vaccine Portal COVID-19 Vaccination Registration Form

To complete the **COVID-19 VACCINATION REGISTRATION** form, the recipient will enter **DEMOGRAPHIC DETAILS**

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Appendix

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, Edge Chromium, Firefox 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 supported.

User Guide Change Log

Version	Date of Change	Changes Made	Author
1	12/10/2020	• Initial document	Azalea Troche
2	12/22/2020	• Search and sort the Recipient Bulk Upload List • COVID-19 Vaccination (Health) Questionnaire Updates • Updated email notification for theCOVID-19 Vaccine Portal	Azalea Troche
3	1/8/2021	• Modify Bulk Upload template • Change instructions for file with more than 100 recipients	Simon Couderc
4	1/14/2021	• Removed Any Remaining Mentions Of The CVMS Help Desk Emails. • Updated Recipient Bulk Upload To Include The Low Volume And High Volume Upload Options • Added CVMS Help Desk Team File Upload	Courtney Seward Azalea Troche Nicholas Rinz
5	1/27/2021	• Updated Navigation Bar Screenshots To Show New Reports Tab • Updated COVID-19 Vaccine Portal Screenshots	Kristin Clark
6	3/3/2021	• Updated Reason for Failure for Bulk Upload • Updated Call Center Information	Nicholas M. Rinz
7	3/4/2021	• Updated text to show correct branding	Kaitlin Gates
8	6/11/2021	• 25: Updated common errors – removed e-mail and added special characters error	Darrell Lee
9	7/27/2021	• New consolidated version • 3: new table of contents	Vanessa Kemajou Darrell Lee
10	8/17/2021	• Removed Slides 35-38 – help desk Info	Kaitlin Gates