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

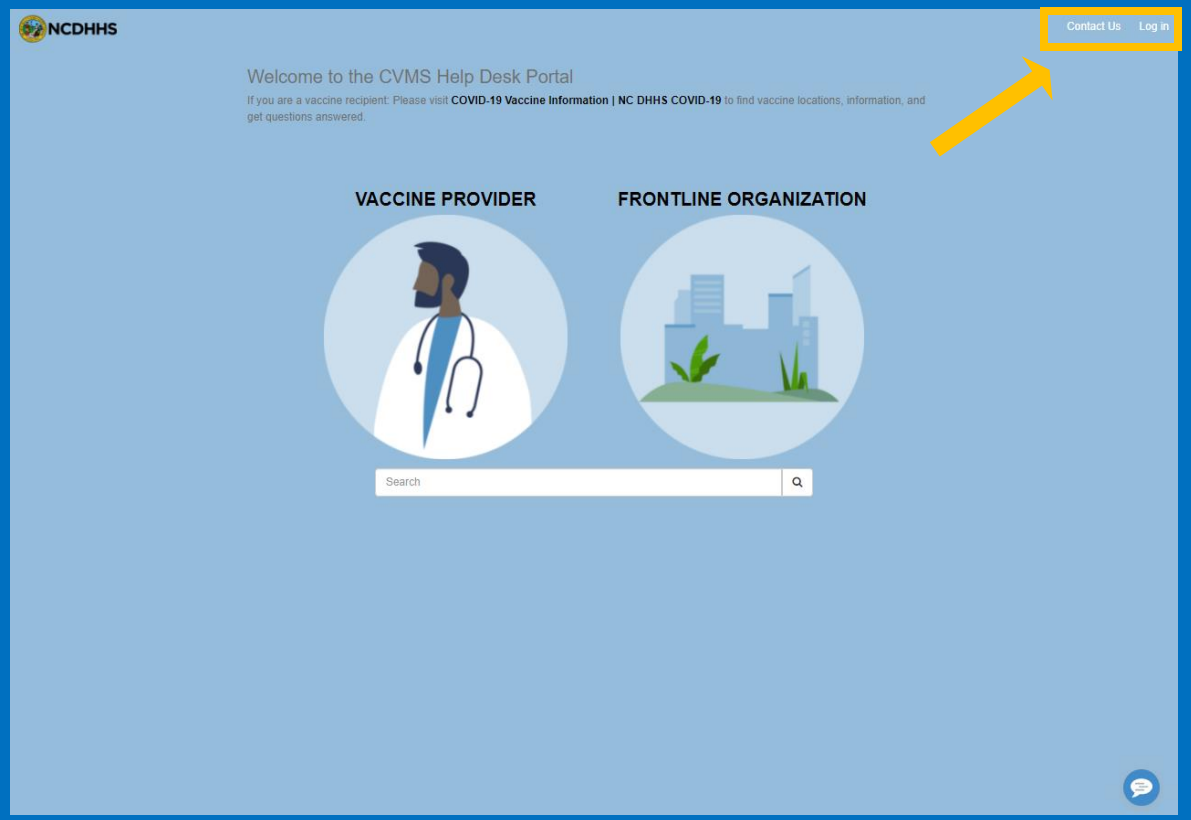
## Step 6 - Receive and manage vaccine inventories

## User Guide

Version 16

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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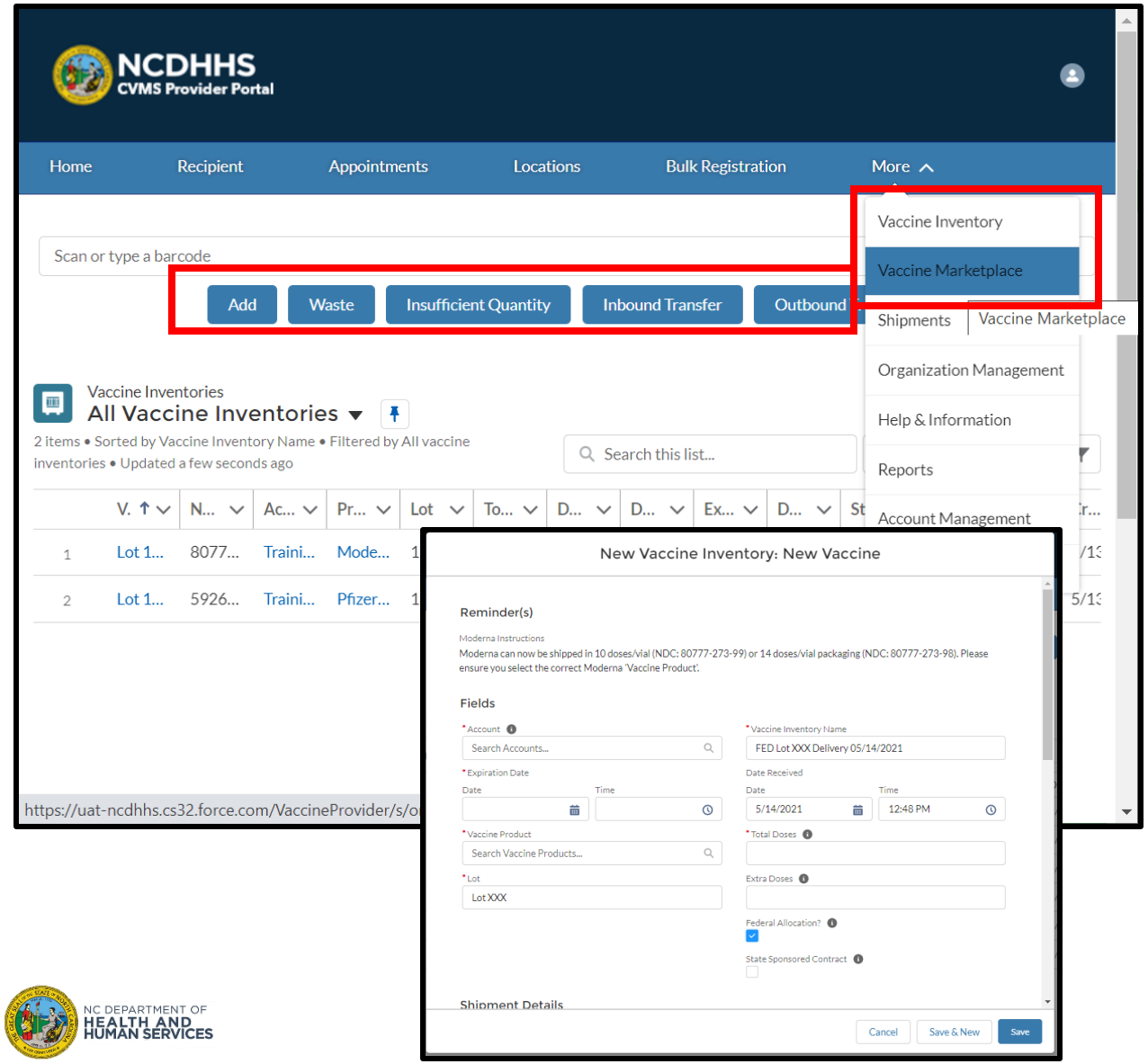
# Overview

# Inventory Management 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 receiving, reductions, deprecations, and transfers / redistributions to other providers or other locations within your organization.

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!**

# Receiving Vaccines

# Overview of the COVID-19 Vaccine Inventory Receiving Process

1

Once a COVID-19 vaccine shipment is on its way, the Primary Vaccine Coordinator will receive an email notification.

From the homepage, click to the Shipments page to **review shipment information.**

A list of shipments will be on the Shipments page.

You will be able to view on this page shipment information, including date shipped, quantity shipped, tracking information, vaccine lot #, NDC #, expiration date, and the manufacturer name.

2

When you **receive a** COVID-19 vaccine shipment, you will **add the inventory** to your location's overall COVID-19 vaccine inventory.

Navigate to the Vaccine Inventory tab and click add.

Enter all needed details into the prompted fields for the shipped COVID-19 vaccine inventory.

Review and save the inputted information.

3

Need to make updates to a Vaccine Inventory Record? You will be able to edit a few fields including the Extra Doses field and the Vaccine Inventory Record Name. You will also be able to update the Vaccine Inventory Status to Complete when there are no more doses available.

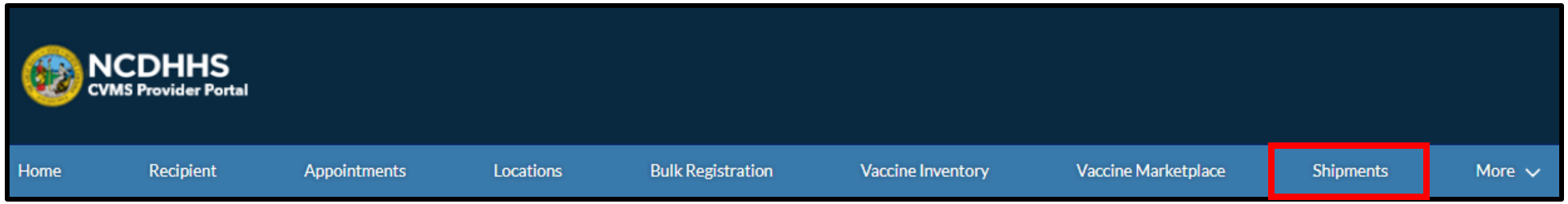
All edits to the Vaccine Inventory Record will be tracked.

# Track Vaccine Shipment Notice

# Step 1 of 4: Navigate to Shipments

Once a COVID-19 vaccine Inventory shipment is on its way, a **VACCINE SHIPMENT RECORD** will be available for you to review in your **SHIPMENTS TAB**.

1. At the top of your home page, click **SHIPMENTS**
2. After clicking **SHIPMENTS**, you will be directed to the **SHIPMENTS PAGE**




## Audience

**Healthcare Location Manager**

## Tips

The Primary Vaccine Coordinator will be notified when a COVID-19 vaccine shipment is on its way. The Primary Vaccine Coordinator was identified by the Organization Administrator during the enrollment process in the CVMS Provider Enrollment Portal.

NOTE: Shipment information for Federal COVID-19 vaccine allocations to Federal Pharmacy Partners will NOT be provided in CVMS.

# Step 1 of 4: The Primary Vaccine Coordinator is also Notified by Email

Primary Vaccine Coordinators will also be notified via **EMAIL** if a **VACCINE SHIPMENT** has been processed for location(s) they support. You can expect the email to come from the **CVMS Support Team**.

The Primary Vaccine Coordinator will receive an email notification for each shipment **BY VACCINE TYPE**. Details in the email will include:

- Date Shipped
- Quantity Shipped
- Manufacturer
- NDC Number
- Lot Number
- ExIS Order Number
- Carrier
- Shipment Tracking Number

*Note: Email will come from nccvms@dhhs.nc.gov*

Hello John Smith,

Please see below for details of a COVID-19 vaccine shipment that is on its way to your location.

Vaccine Details:

- **Date Shipped:** 02/01/2021
- **Quantity Shipped:** 300
- **Manufacturer:** Moderna TX
- **NDC:** 80777-0273-99
- **Lot Number:** 032L20A
- **ExIS Order ID:** FLU920001FC01302021

Shipment Tracking Information:

- **Carrier:** UPS1
- **Shipment Tracking Number:** 1Z126W010100941170

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

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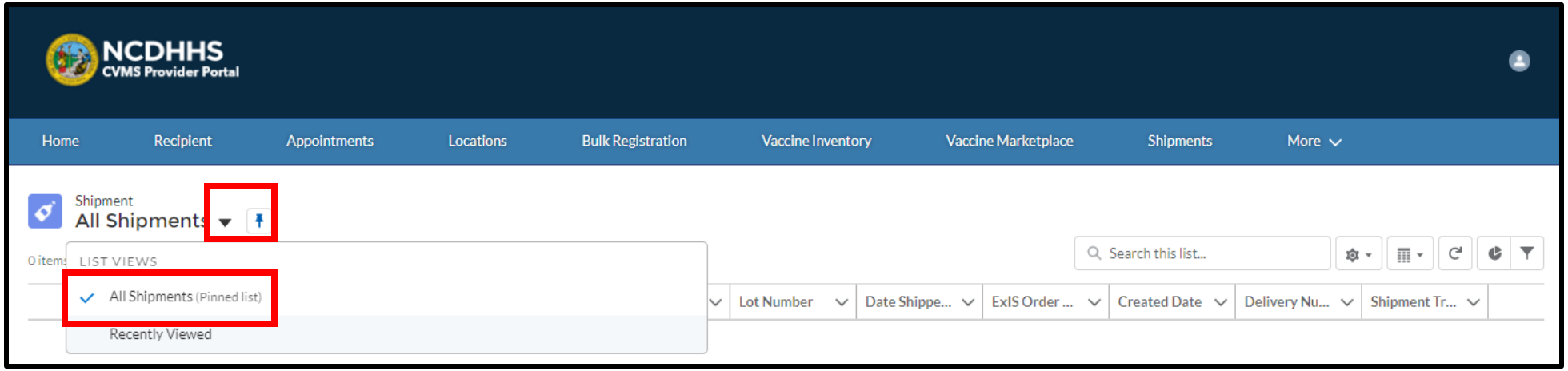
# Step 2 of 4: Switch Shipment Record List Views

You will see a **LIST VIEW** on your page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed list view. To see all your Shipment Records, you will have to switch to the 'All Shipment' records list view. You will be able to switch back and forth between list views.

1. Click the **DROP-DOWN MENU** next to the list view name
2. Click **ALL SHIPMENTS**
3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

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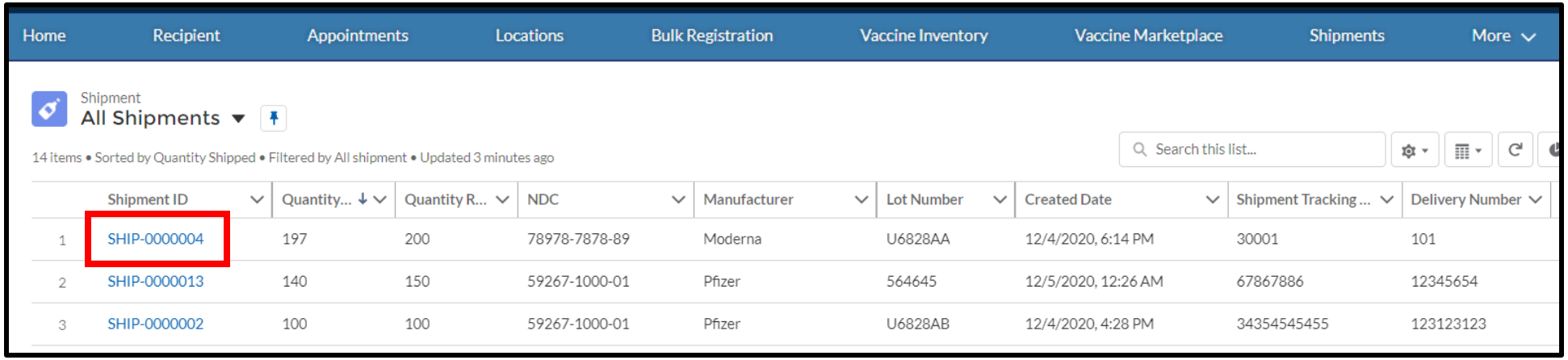
# Step 3 of 4: Navigate to the Shipment Record

On this page, you will see a list of Vaccine Shipment records for the location(s) you support. The **VACCINE SHIPMENT RECORD** will be **RELATED** to an **ORDER RECORD.** This means that your Vaccine Shipment record will always be associated to a specific order.

1. Locate the **SHIPMENT ID**
2. Click the **SHIPMENT ID HYPERLINK**
3. You will be directed to the **VACCINE SHIPMENT RECORD**




| | Shipment ID | Quantity... | Quantity R... | NDC | Manufacturer | Lot Number | Created Date | Shipment Tracking ... | Delivery Number |
|---|---|---|---|---|---|---|---|---|---|
| 1 | SHIP-0000004 | 197 | 200 | 78978-7878-89 | Moderna | U6828AA | 12/4/2020, 6:14 PM | 30001 | 101 |
| 2 | SHIP-0000013 | 140 | 150 | 59267-1000-01 | Pfizer | 564645 | 12/5/2020, 12:26 AM | 67867886 | 12345654 |
| 3 | SHIP-0000002 | 100 | 100 | 59267-1000-01 | Pfizer | U6828AB | 12/4/2020, 4:28 PM | 34354545455 | 123123123 |

## Audience

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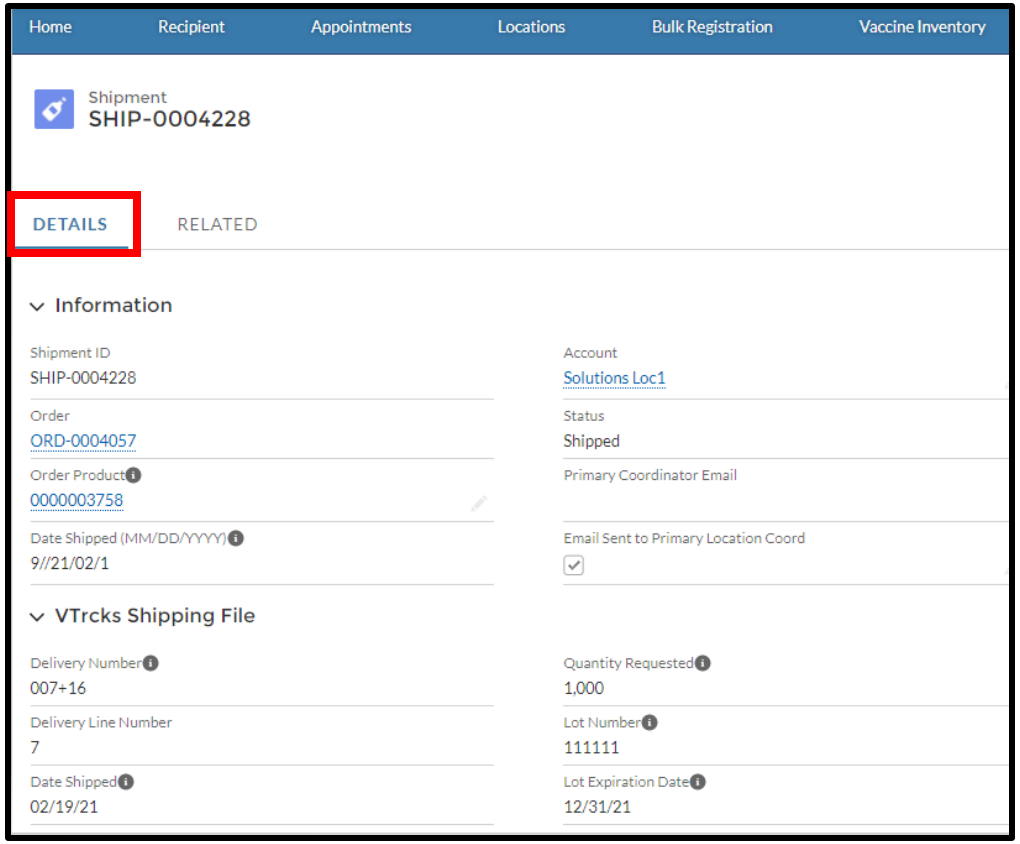
## Tips

You can use the SEARCH BAR to search for a record. Clicking on column header will sort by the column.

For example, you may choose to sort by SHIPMENT DATE.

# Step 4 of 4: Navigate to the Shipment Details




On the Shipment record, you will be able to **REVIEW DETAILS** about your expected order including:

- Date Shipped
- Quantity Shipped
- Tracking Information
- Lot #
- NDC #
- Expiration Date
- Manufacturer

1. On the Shipment record, click on the **DETAILS TAB**

## Audience

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## Tips

Review specific details about your order.

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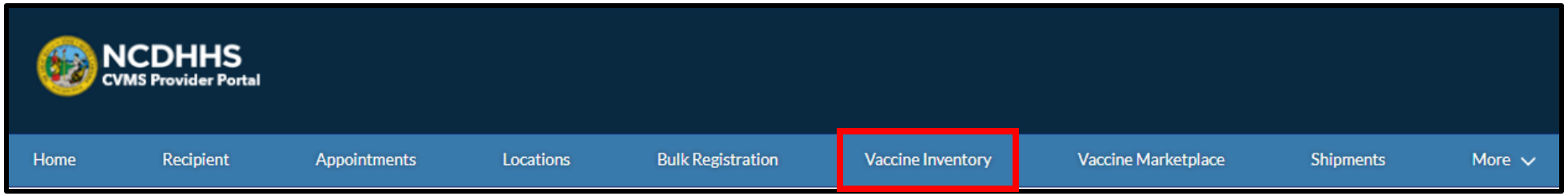
# Add New Vaccine Inventory

# Step 1 of 7: Navigate to the Vaccine Inventory tab

When you **PHYSICALLY RECEIVE** a COVID-19 vaccine inventory shipment for any COVID-19 vaccine type, you will want to **ADD THE INVENTORY** to your location's overall COVID-19 vaccine inventory. Processing your COVID-19 vaccine shipments correctly will ensure that your COVID-19 vaccine levels are accurate for your reporting.

*This process **DOES NOT** include processing inbound COVID-19 vaccine inventory transfers or redistributions. Please see the Receiving a COVID-19 Vaccine Transfer / Redistribution section for steps on how to process inbound transfers or redistributions.*

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**

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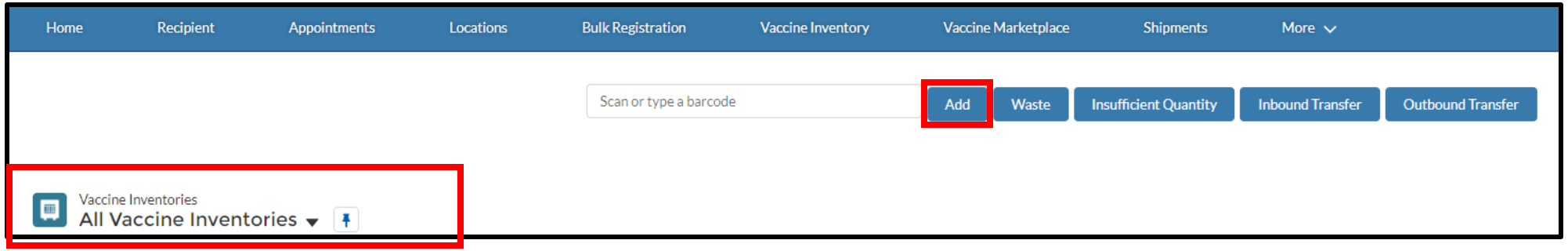
**Tips**

NOTE: Federal COVID-19 vaccine shipments to Federal Pharmacy Partners are NOT tracked or managed in the CVMS Provider Portal.

# Step 2 of 7: Create a New Vaccine Inventory Record

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. This will be your main working page for ensuring that your inventory levels are accurate. See the **CVMS PROVIDER PORTAL INVENTORY DEPRECATION, TRANSFER, AND REDISTRIBUTION USER GUIDE at** CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19 to learn more about COVID-19 vaccine Wastage, Insufficient Quantities, and Redistribution / Transfer processes.

1. Click **ADD**
2. After clicking add, you will be prompted to **PROVIDE ADDITIONAL VACCINE DETAILS**

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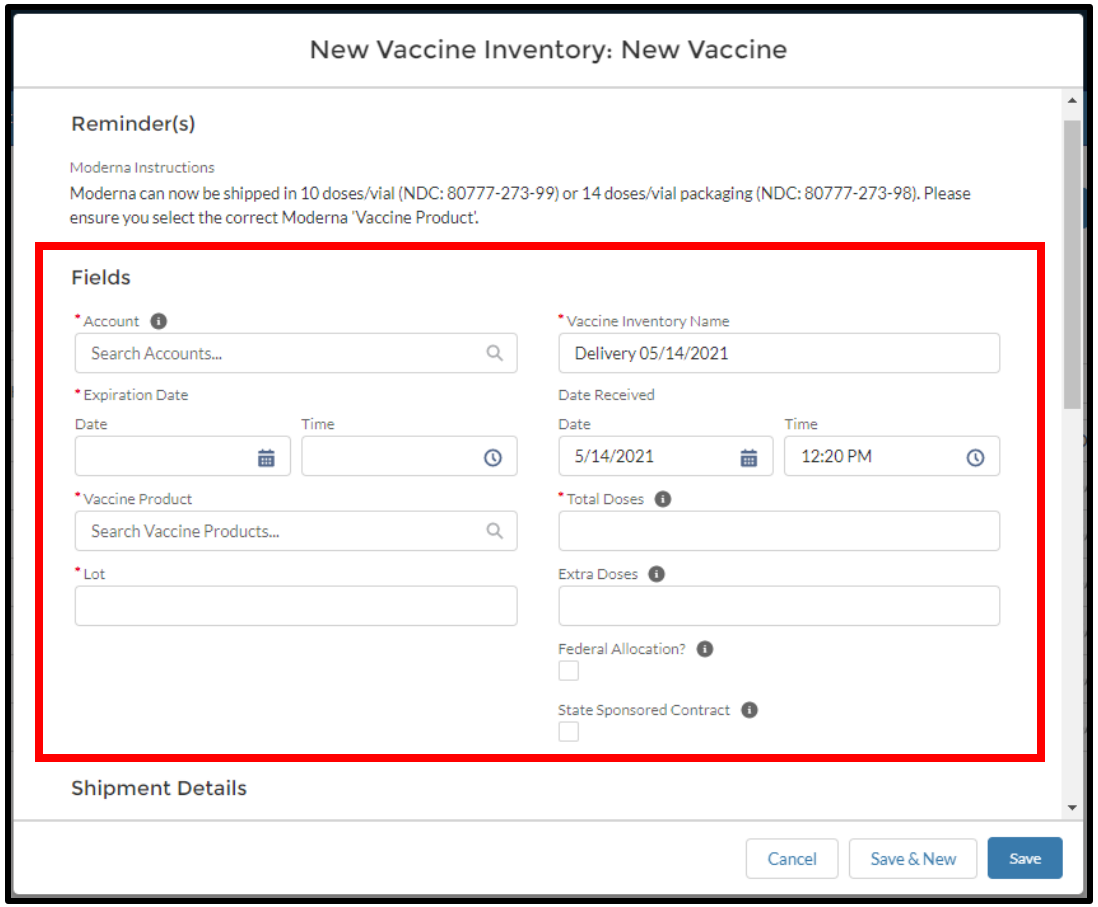
## Tips

By Default, the view is set as “Recently Viewed”, therefore the list will seem empty at first.

Change the view to “All Vaccine Inventories” and click the THUMBNAIL icon to PIN your favorite list view.

# Step 3 of 7: Enter Vaccine Inventory Information




*For more information on Extra Doses, see page* **'Entering Extra Doses'**.

The **NEW VACCINE INVENTORY PAGE** will appear.

To search for a picklist value, you need to enter at least **THREE CHARACTERS.**

1. Populate all required **VACCINE INVENTORY FIELDS**
   - Account (Do not create a new Account)
   - Vaccine Inventory Name *(editable)*
   - Expiration Date
   - Date and Time Received
   - Vaccine Product
   - Total Doses
   - Lot #
   - Federal Allocation?
   - State Sponsored Contract
2. Continue to **SHIPMENT DETAILS**

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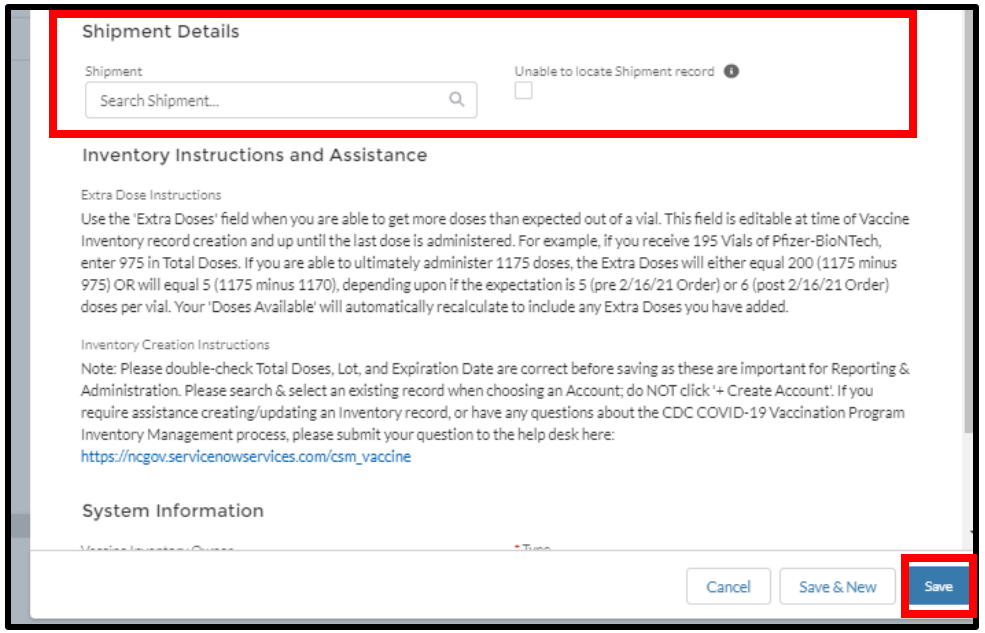
**Tips**

When adding Inventory into CVMS, we recommend including the Lot #'s in the Inventory Name to help staff that are administering vaccines to recipients to more easily choose the correct Inventory record.

Shipments from **DIFFERENT LOT NUMBERS** must be entered as separate Inventory records.

# Step 4 of 7: Enter Shipment Details




You can now enter the remaining Vaccine Shipment record details.

Do **NOT** reduce the **TOTAL DOSES AMOUNT** if you have wastage or plan to redistribute inventory.

This process **MUST** be recorded separately as **INVENTORY DEPRECATION**.

1. Select a **SHIPMENT RECORD**
2. If you cannot locate the Shipment record, **CHECK** the **UNABLE TO LOCATE SHIPMENT RECORD** box
3. Before saving, **REVIEW** all entered details
4. Click **SAVE**

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## Tips

You may click SAVE & NEW to process / add additional Vaccine Inventory records.

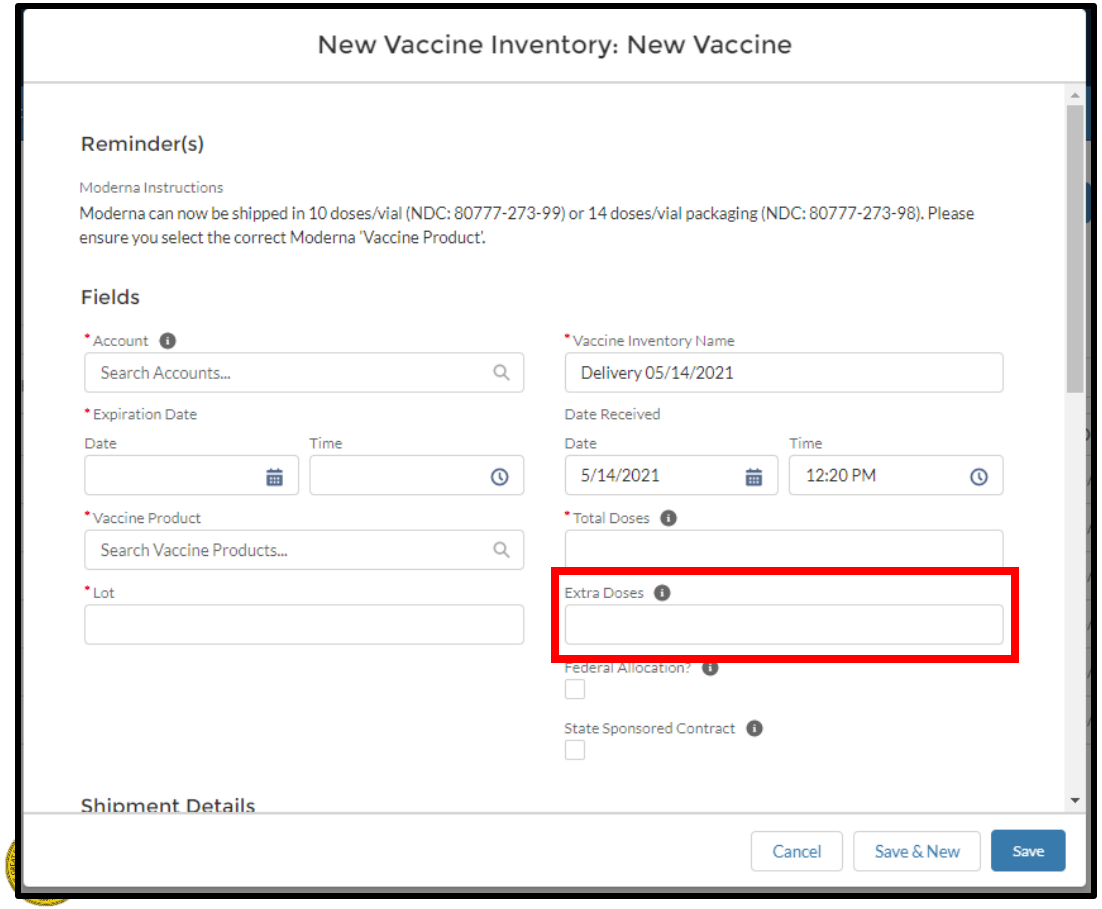
Vaccine Pfizer products Ordered on or after January 26 should be logged as the 6 doses/vial Pfizer product (not 5) so that inventory is being tracked per more recent guidance from the CDC. Vaccine Pfizer products Ordered before January 26 should be logged as the 5 doses/vial Pfizer product.

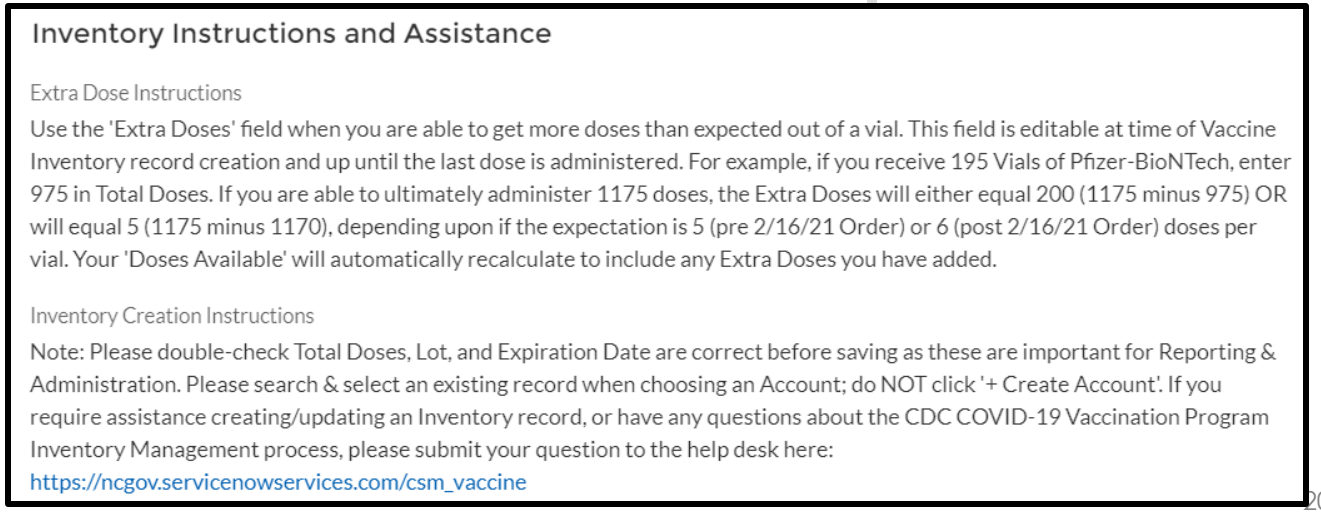
# Step 5 of 7: Entering Extra Doses

If you know you will have extra doses, you can update the **EXTRA DOSES** field. You will be able to update this field later to reflect the actual number of extra doses administered.

For an example on when to record **EXTRA DOSES**, please see the **INVENTORY INSTRUCTIONS AND ASSISTANCE** image below.

*Note: The CDC has directed that the Pfizer 6 dose vials should never have an extra dose.*

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## Tips

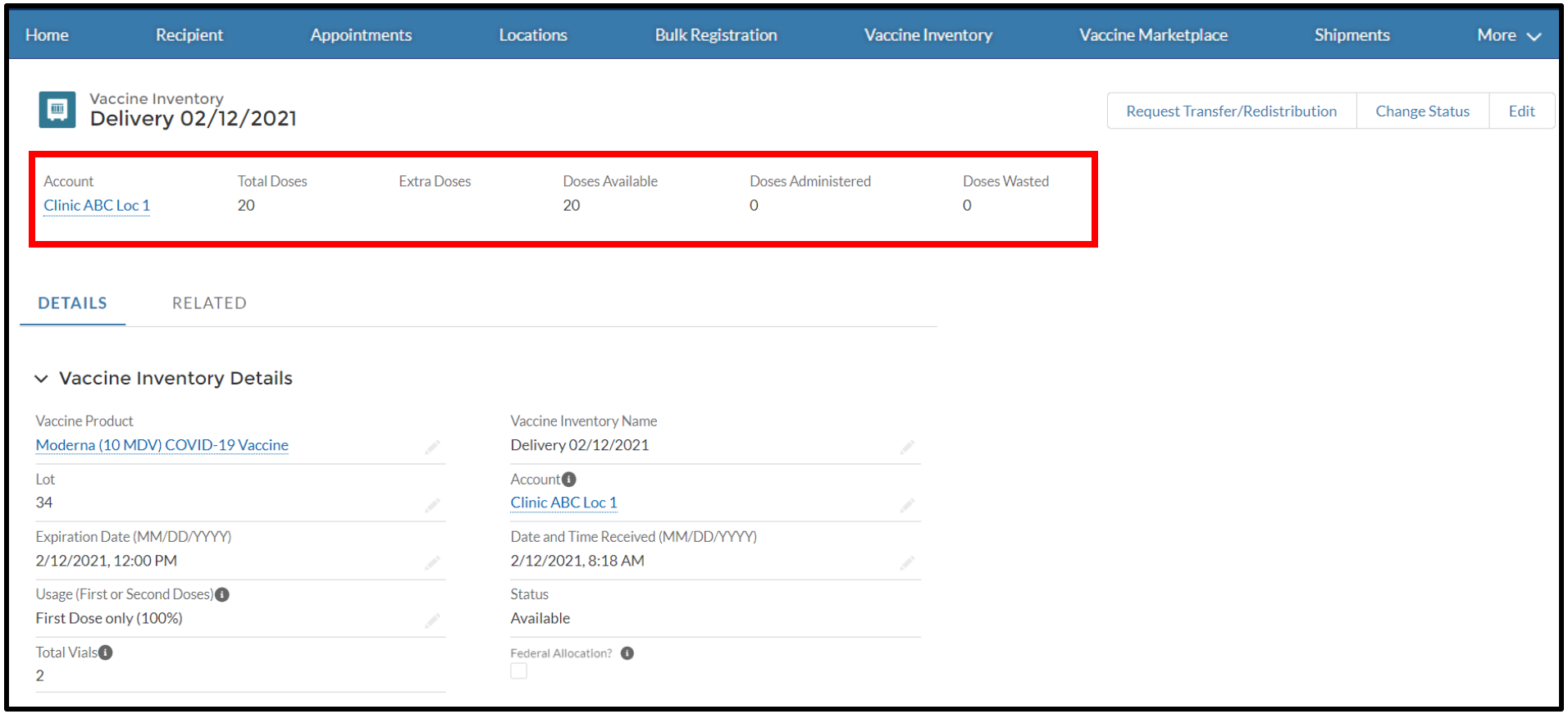
The Extra Doses field is editable at time of Vaccine Inventory record creation and up until the last dose is administered.

It is recommended that you enter extra doses as they happen instead of at the time of record creation.

# Step 6 of 7: Review the Vaccine Inventory Record

After clicking save, you will be directed to the **VACCINE INVENTORY RECORD**. Your total COVID-19 vaccine inventory has now been updated to reflect this additional inventory.

At the top of the record, your **VACCINE INVENTORY HIGHLIGHT PANEL** will reflect ongoing **DOSAGE ACTIVITY** for this inventory.




## Audience

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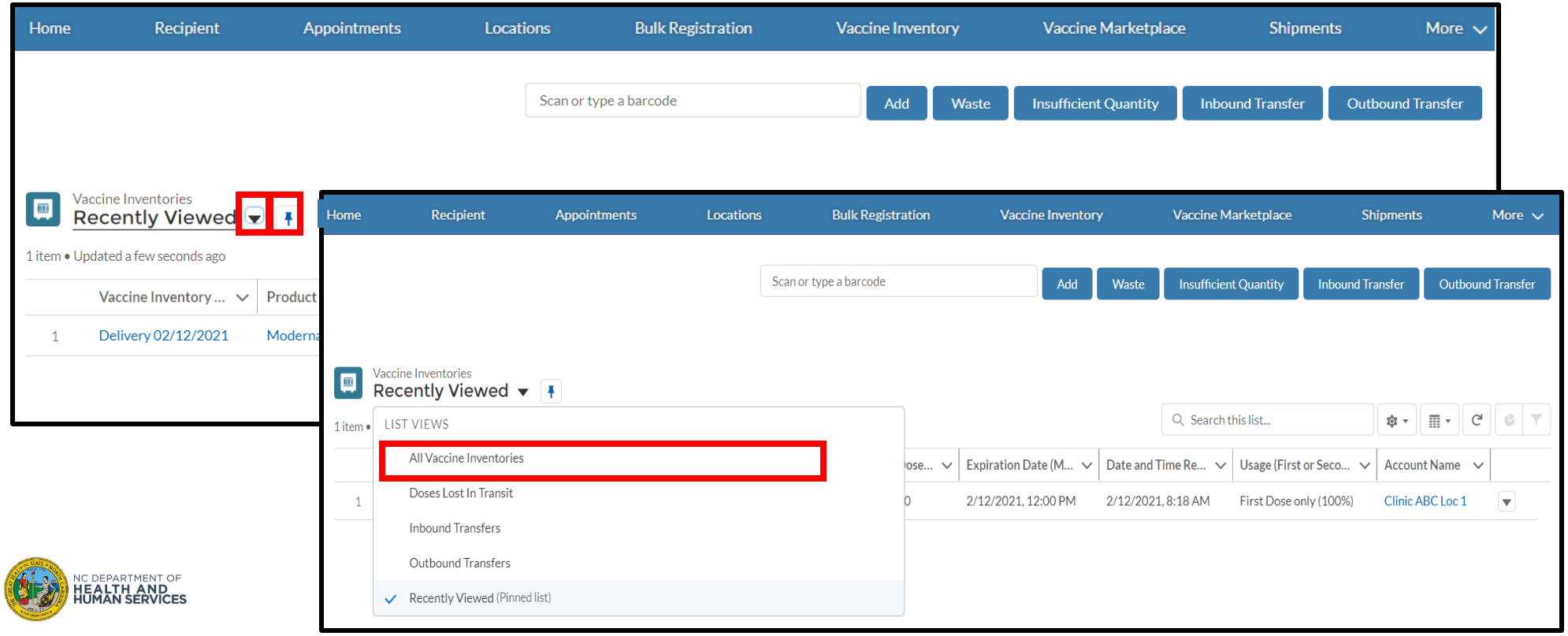
## Tips

Review the Highlight Panel at the top of the Vaccine Inventory Record.

# Step 7 of 7: Switch Inventory List Views

You will see a **LIST VIEW** on the vaccine inventory page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed List View. To see all your Inventory Records, you will have to switch to the All Vaccine Inventory Records list view. You will be able to switch back and forth between list views.

1. Click the **DROP-DOWN MENU** next to the list view name
2. Click **ALL VACCINE INVENTORIES**
3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

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## Tips

Click the THUMBNAIL icon to PIN your favorite list view.

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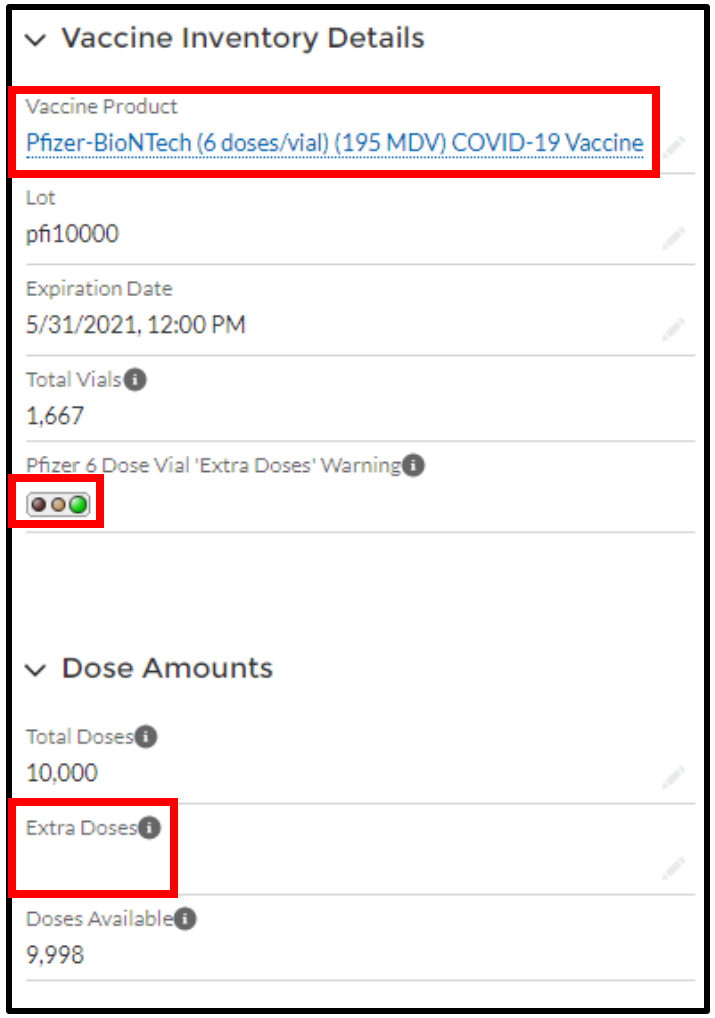
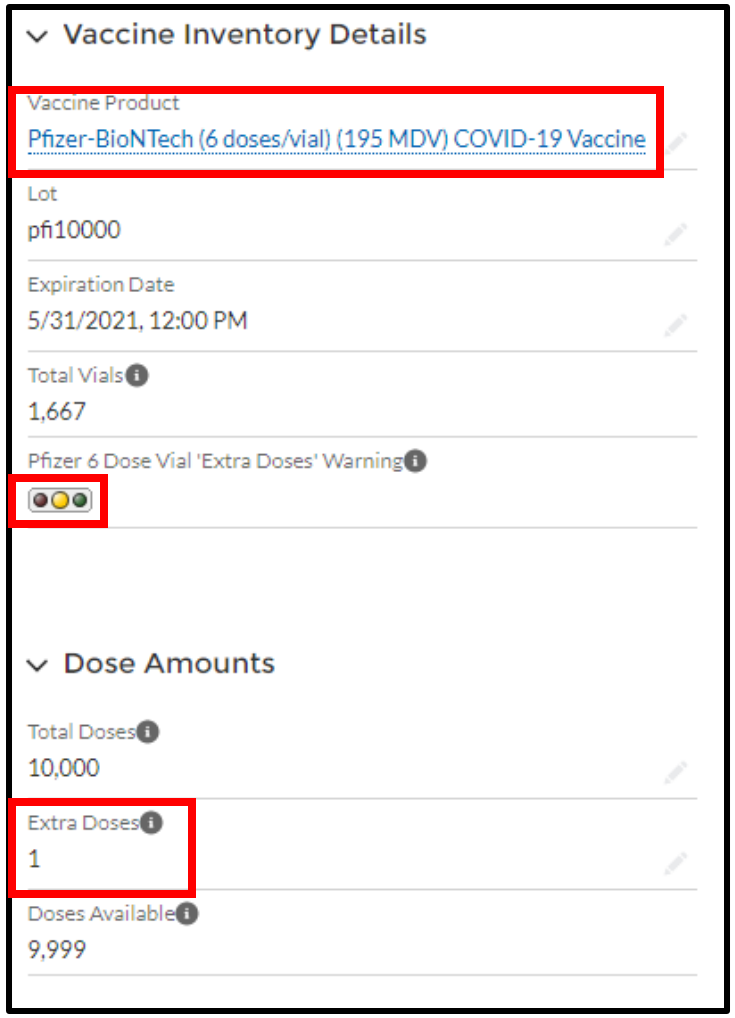
# Special attention to the Pfizer 6-dose vial control

Due to the nature of the Pfizer 6-dose vial, extra doses are not allowed by the CDC. Though CVMS will still allow you to enter an extra dose for any vaccine inventory, you will receive a yellow traffic light visual alert for any Pfizer 6-dose product inventories if you attempt to add extra doses.

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## Tips

If extra doses were previously annotated, do not try to remove them. All extra doses and wastage events should be entered at the time of the event.

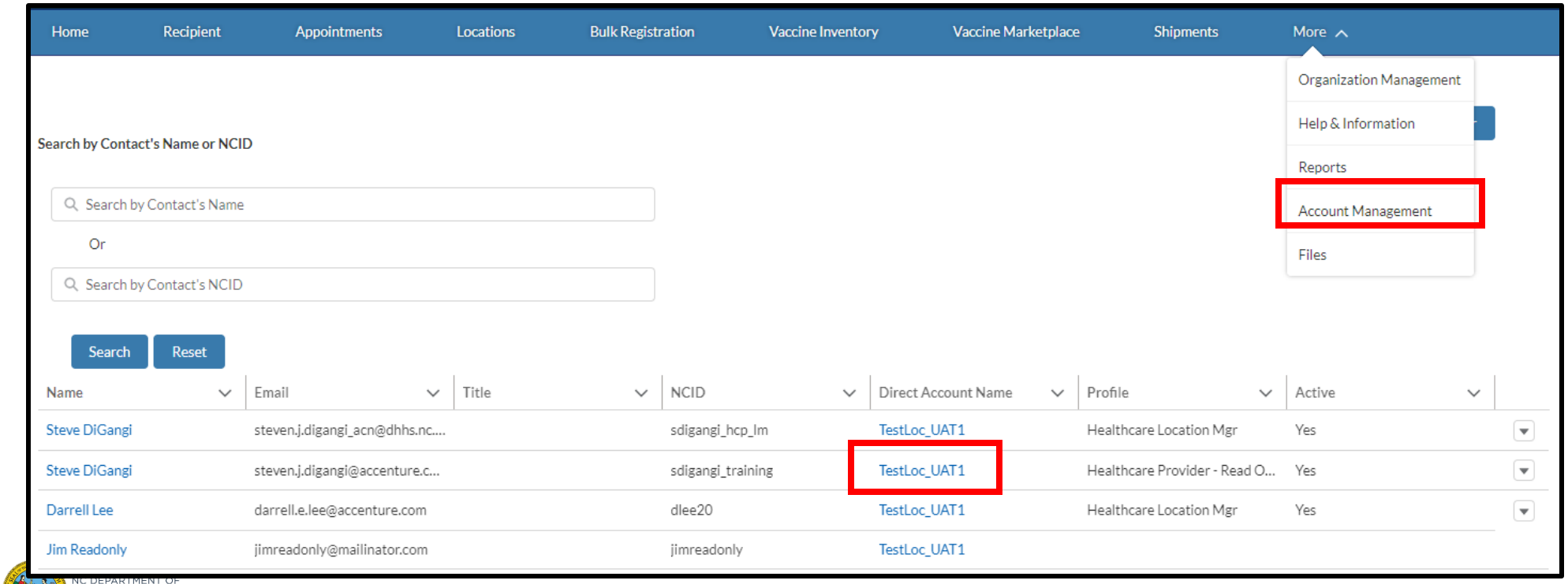
# Declare Availability for More Allocations by the State

# Step 1 of 2: Navigate to the Account Record (Location)

You will be able to adjust your availability to receive COVID-19 vaccine inventory each week for your location in the CVMS Provider Portal. It is important that you **UPDATE YOUR AVAILABILITY BY MONDAY AT 10:00 AM EACH WEEK** if you want your adjustment to be considered for vaccine allocation planning.

If you indicate **YES**, that means your location is able to receive COVID-19 vaccine inventory that week if allocated. If you indicate **NO** because you do not have storage or capacity, your location will not be allocated COVID-19 vaccine inventory until you update your preference.

1. From the Account Management tab, click the **ACCOUNT NAME (LOCATION)**

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**Tips**

If you have multiple locations, make sure to update each location's Allocation Availability each week as appropriate.

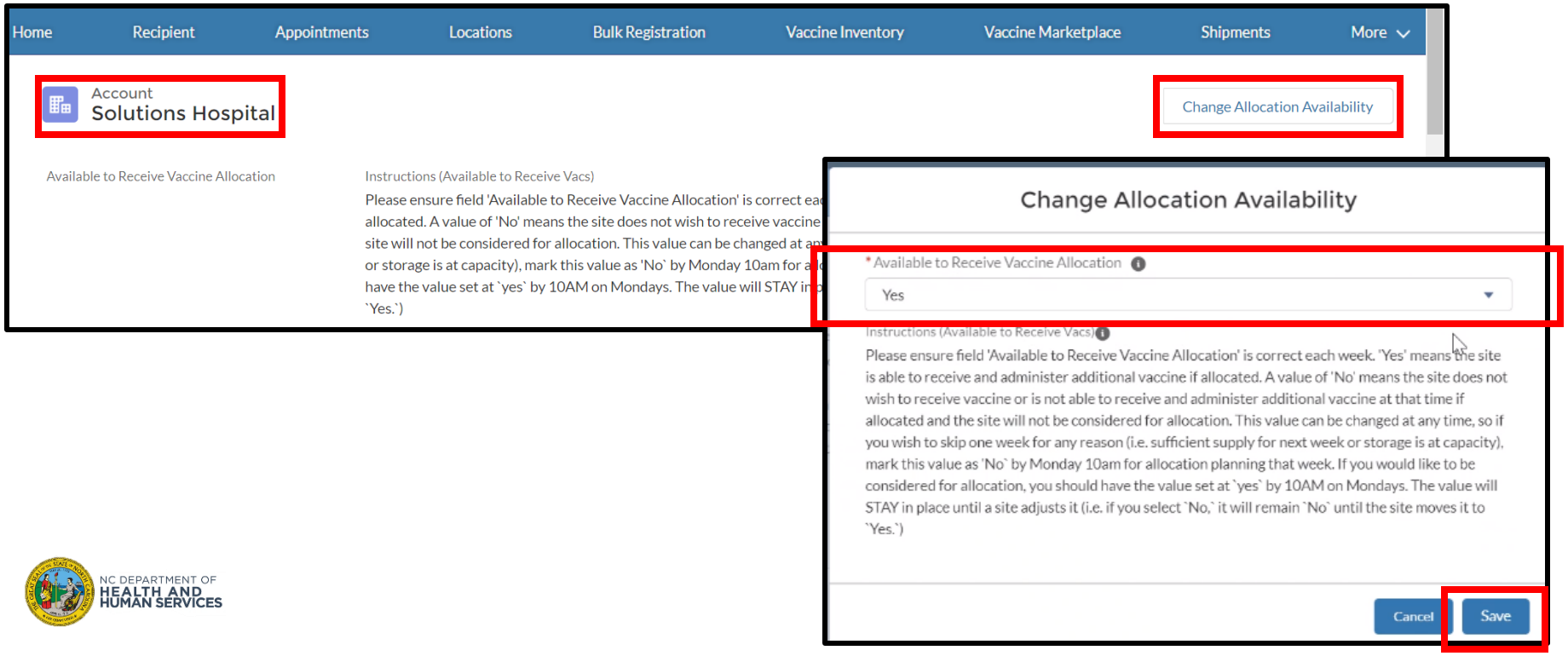
You can also get to the Account Record (Location) from the Vaccine Inventory tab and clicking on the Account Name (Location) field from any row of vaccine inventory records.

# Step 2 of 2: Update Your Location's Availability to Receive COVID-19 Vaccine Inventory

From your Account (Location) Record, you can use the **CHANGE ALLOCATION AVAILABILITY** button to certify that your location is able to receive and administer additional vaccine if allocated. This **VALUE DOES NOT RESET OR AUTOMATICALLY UPDATE EACH WEEK.** It will remain the same as the last updated value until you change it.

Your location's **ALLOCATION AVAILABILITY STATUS** is defaulted to **YES** upon registration.

1. From the Account Record (Location), click the **CHANGE ALLOCATION AVAILABILITY** button
2. Select **YES** or **NO** from the drop-down menu
3. Click **SAVE**

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## Tips

Once you select Yes or No for a location, this selection will remain until you change it.

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# Exchanging Vaccines Through the Vaccine Marketplace

# What is 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 can be 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 can be 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.**

# What is a Hub?

Providers can also send extra doses to a Hub and obtain new doses from a Hub.

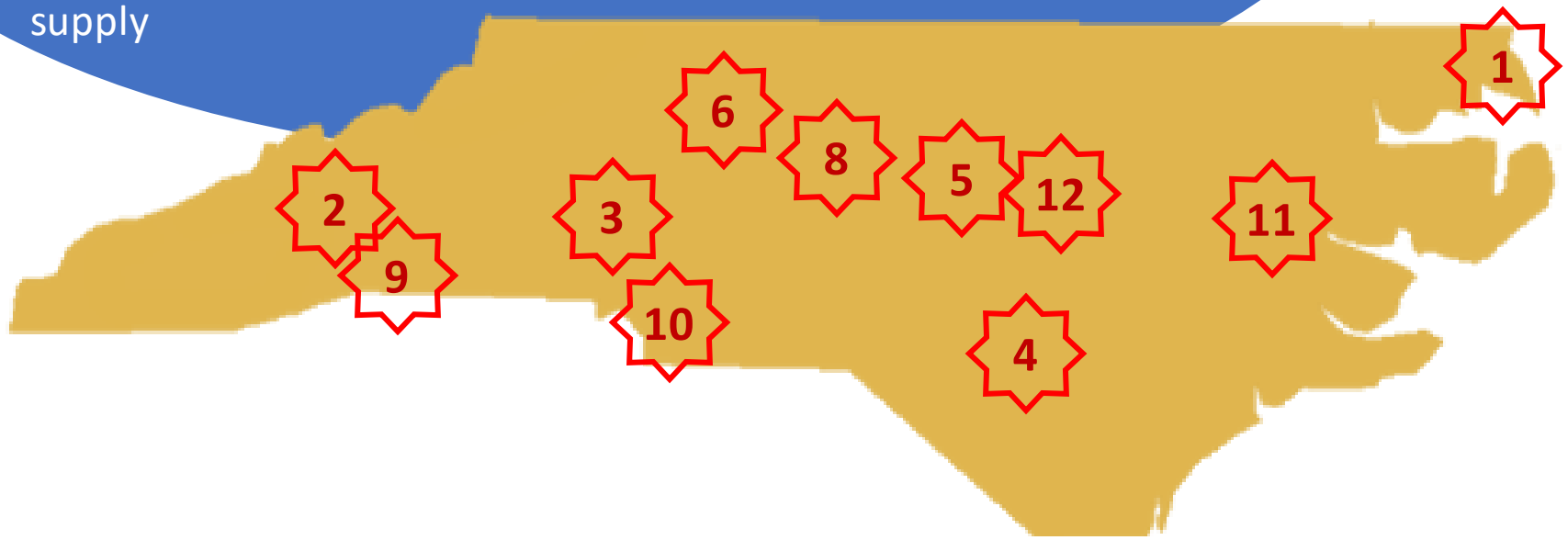
## What is a Hub?

- Hubs are locations contracted by NCDHHS to serve as COVID-19 **vaccine repositories**. Hubs consolidate vaccine inventories that are dispersed among multiple providers.
- These designated Hubs are also able to deliver and/or facilitate COVID-19 vaccine pickups if a transfer is requested.

## Which hub should you contact?

- Contact your assigned Hub (see "Find your associated Hub" in this document), or the Hub closest to your location
- Filter the Vaccine Marketplace on your Hub to check their supply

| | | |
|---|---|---|
| Hub 1 | Currituck County Health Department | Currituck |
| Hub 2 | Buncombe County Health and Human Services | Buncombe |
| Hub 3 | Catawba County Public Health | Catawba |
| Hub 4 | Cumberland County Health Department | Cumberland |
| Hub 5 | Durham County Health Department | Durham |
| Hub 6 | Forsyth County Health Department | Forsyth |
| Hub 8 | Moses H. Cone Memorial Hospital | Guilford |
| Hub 9 | Henderson County Health Department | Henderson |
| Hub 10 | StarMed Family & Urgent Care - Freemore | Freemore |
| Hub 11 | Vidant Medical Center | Pitt |
| Hub 12 | Wake County Human Services | Wake |

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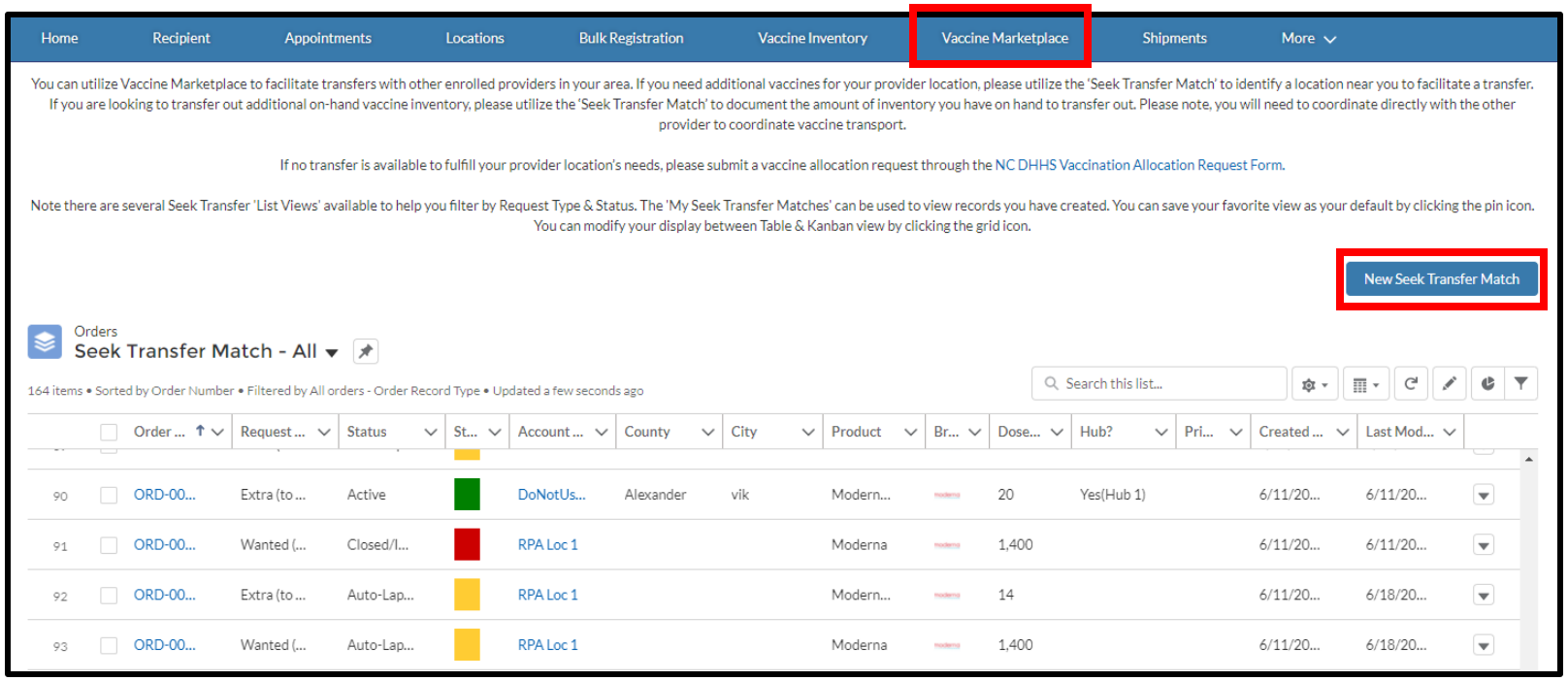
# Search and Post Request in the Vaccine Marketplace




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 COVID-19 vaccine product.

**Hubs** will also use the Vaccine Marketplace to list the Extra Doses they have at hand.

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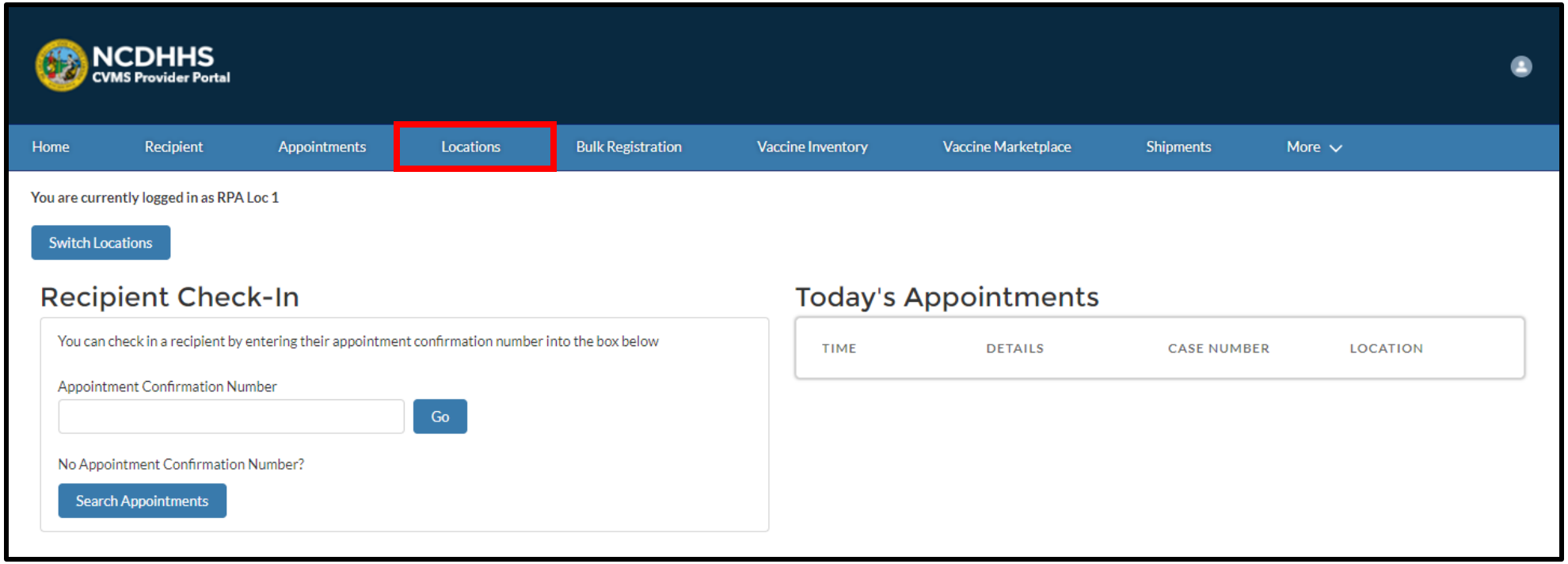
# Find your Associated Hub

# Step 1 of 3: Find Your Account Record

The NCDHHS team will assign COVID-19 vaccine providers to the different Hubs around the State. If you have doubts on the Hub assigned to your location, follow these instructions.

1. Navigate to the **LOCATIONS** tab

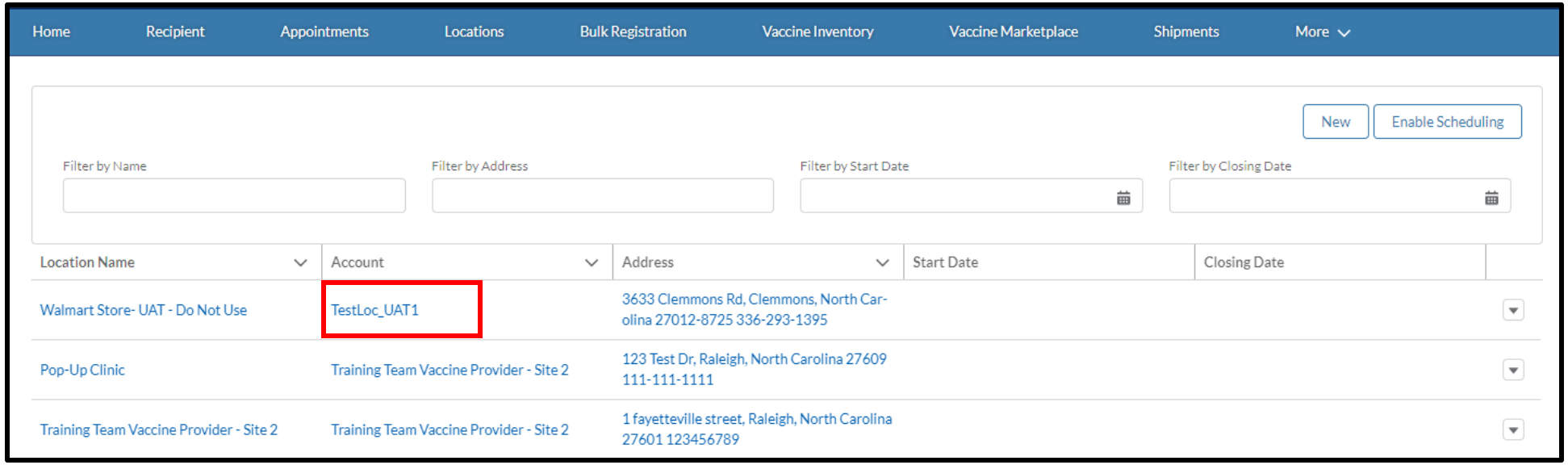



**Audience**

**Healthcare Location Manager**

# Step 2 of 3: Open your Location Account Record

1. Click on the **ACCOUNT NAME** (not on the Location Name)

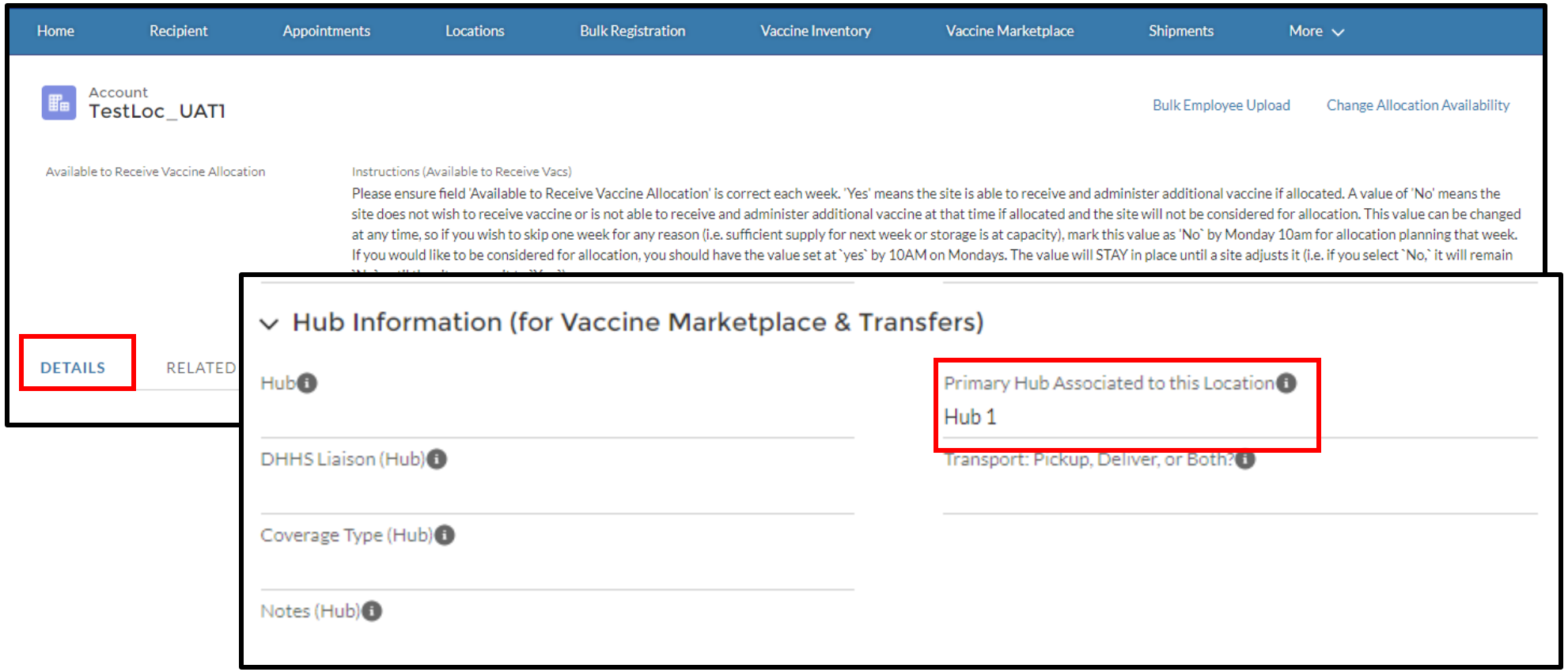



## Audience

**Healthcare Location Manager**

# Step 3 of 3: Find the Primary Hub Associated to Your Location

1. Select the **DETAILS** tab
2. Scroll to the bottom to view **HUB INFORMATION**
3. The Hub allocated to your location will appear under **PRIMARY HUB ASSOCIATED TO THIS LOCATION**




## Audience

**Healthcare Location Manager**

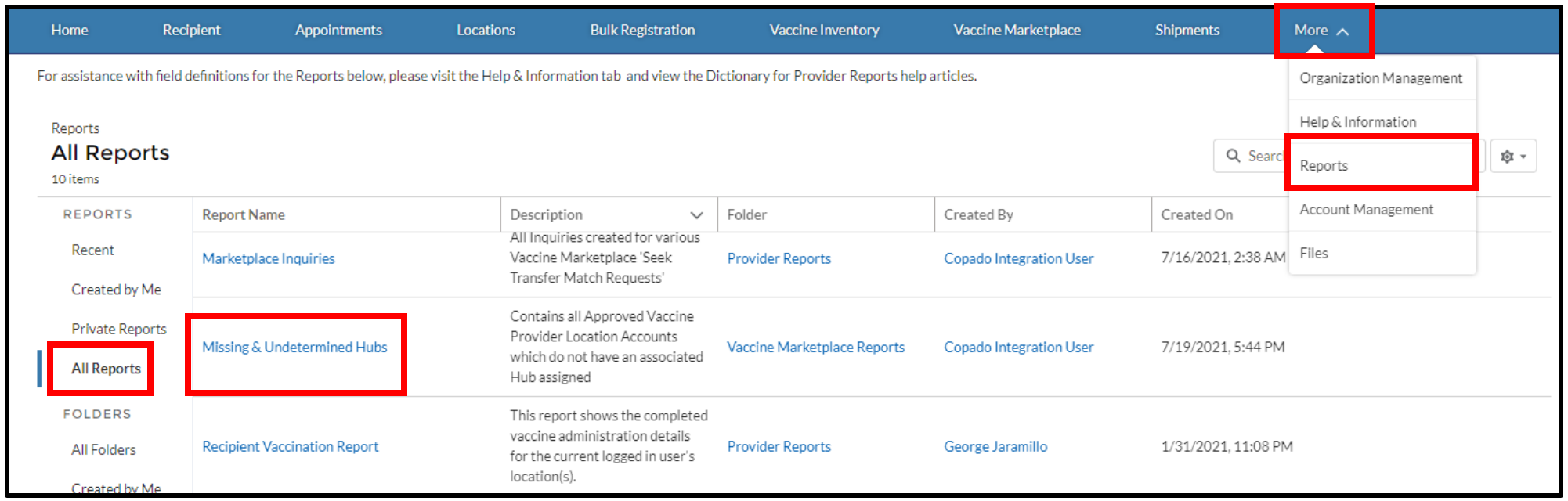
## Tips

If your location is currently not assigned to a Hub, the field will be either empty or filled with **INDETERMINED**. If it is the case, feel free to contact the Hub of your choice to confirm if they can support you.

# Accessing the Missing and Undetermined Hubs Report

The Missing and Undetermined Hubs Report displays hub information for all accounts that are not associated with a Vaccine Marketplace Hub.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **MISSING & UNDETERMINED HUBS REPORT**




## Audience

**Healthcare Location Manager**

## Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal.

# Accessing the Missing and Undetermined Hubs Report (Continued)

Home | Recipient | Appointments | Locations | Bulk Registration | Vaccine Inventory | Vaccine Marketplace | Shipments | More

Report: Accounts

**Missing & Undetermined Hubs**

Contains all Approved Vaccine Provider Location Accounts which do not have an associated Hub assigned

Add Chart | Export

Total Records

1

| | Description | Account Name | Primary Hub Associated to this Location | Provider PIN | Vaccine Administration County | Vaccine Shipping County | Parent Account | COVID-19 Vaccinatio |
|---|---|---|---|---|---|---|---|---|
| 1 | - | Training Team Vaccine Provider - Site 2 | - | 123457 | Wake | Wake | Training Team Vaccine Provider | Medical practice : fami |

## Audience

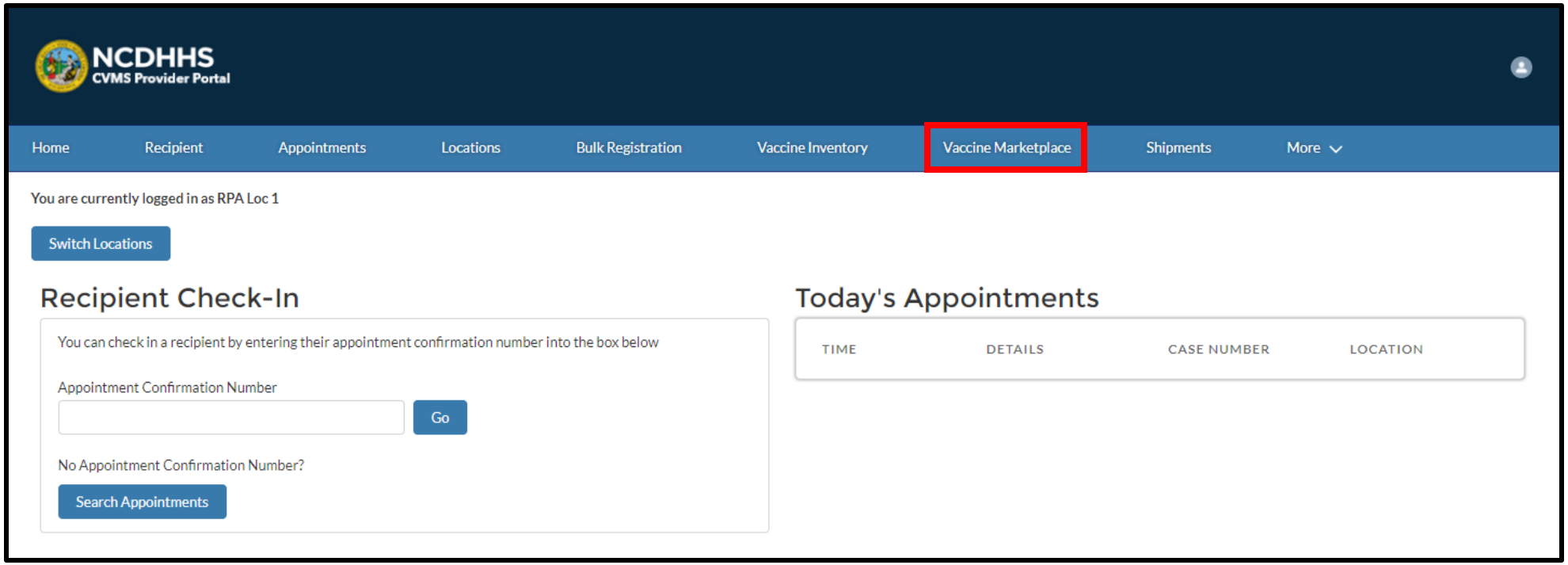
Healthcare Location Manager

# Offer your Vaccine Surplus

# Step 1 of 13: Navigate to the Vaccine Marketplace

If you have a surplus of COVID-19 vaccine doses, **first contact your assigned Hub** to check if they can collect them from you. If not, 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 in the Vaccine Marketplace.

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

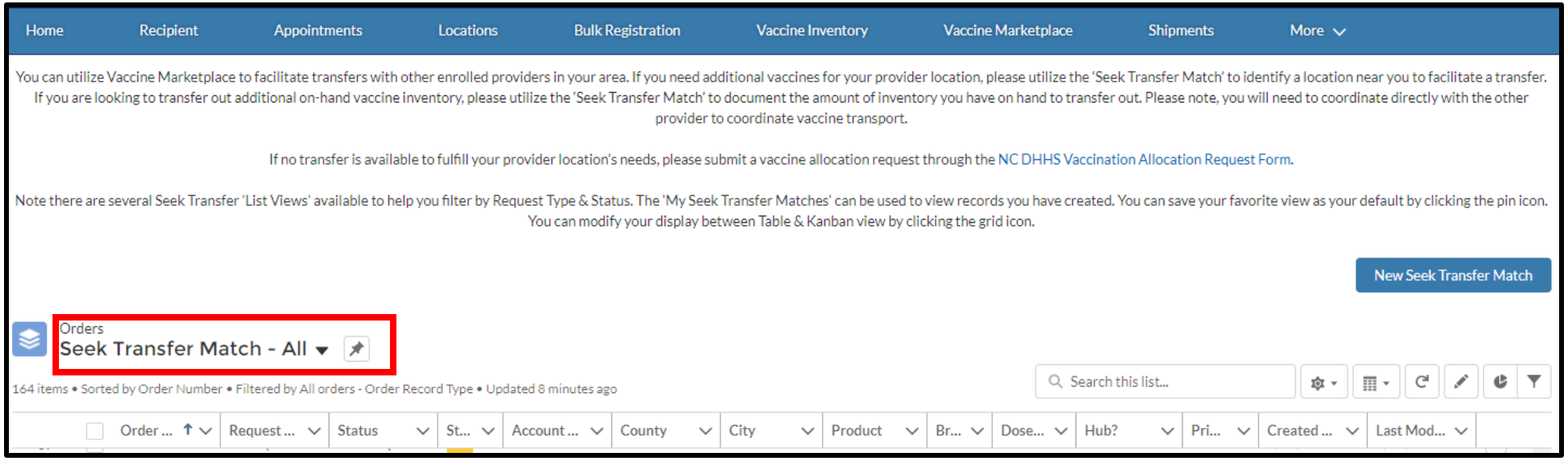



**Audience**

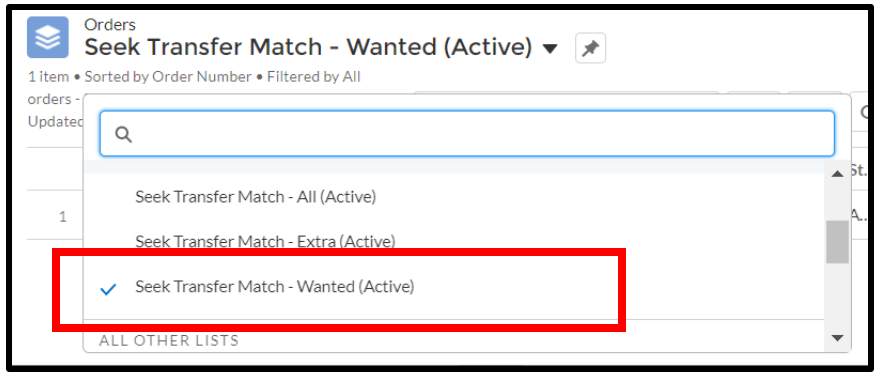
**Healthcare Location Manager**

# Step 2 of 13: 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)**




## Audience

**Healthcare Location Manager**

## Tips

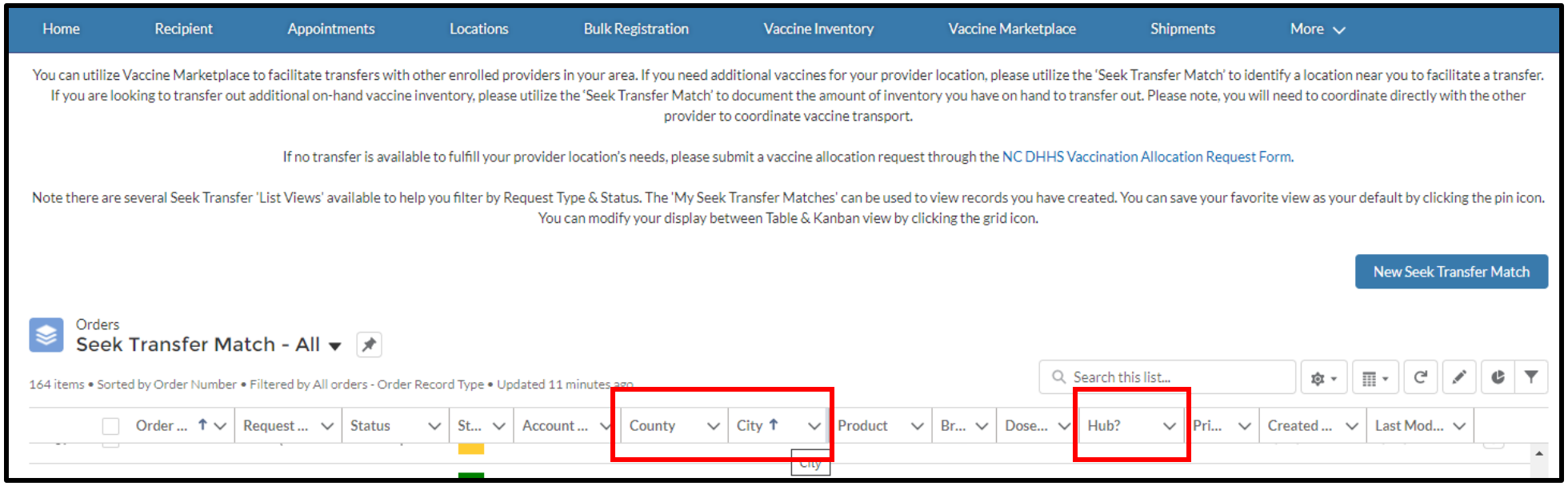
To always see the available and active requests, set the view to **SEEK TRANSFER MATCH – ALL**, and use the pin icon to set this as your default view.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Step 3 of 13: Sort Inventories by Location

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

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



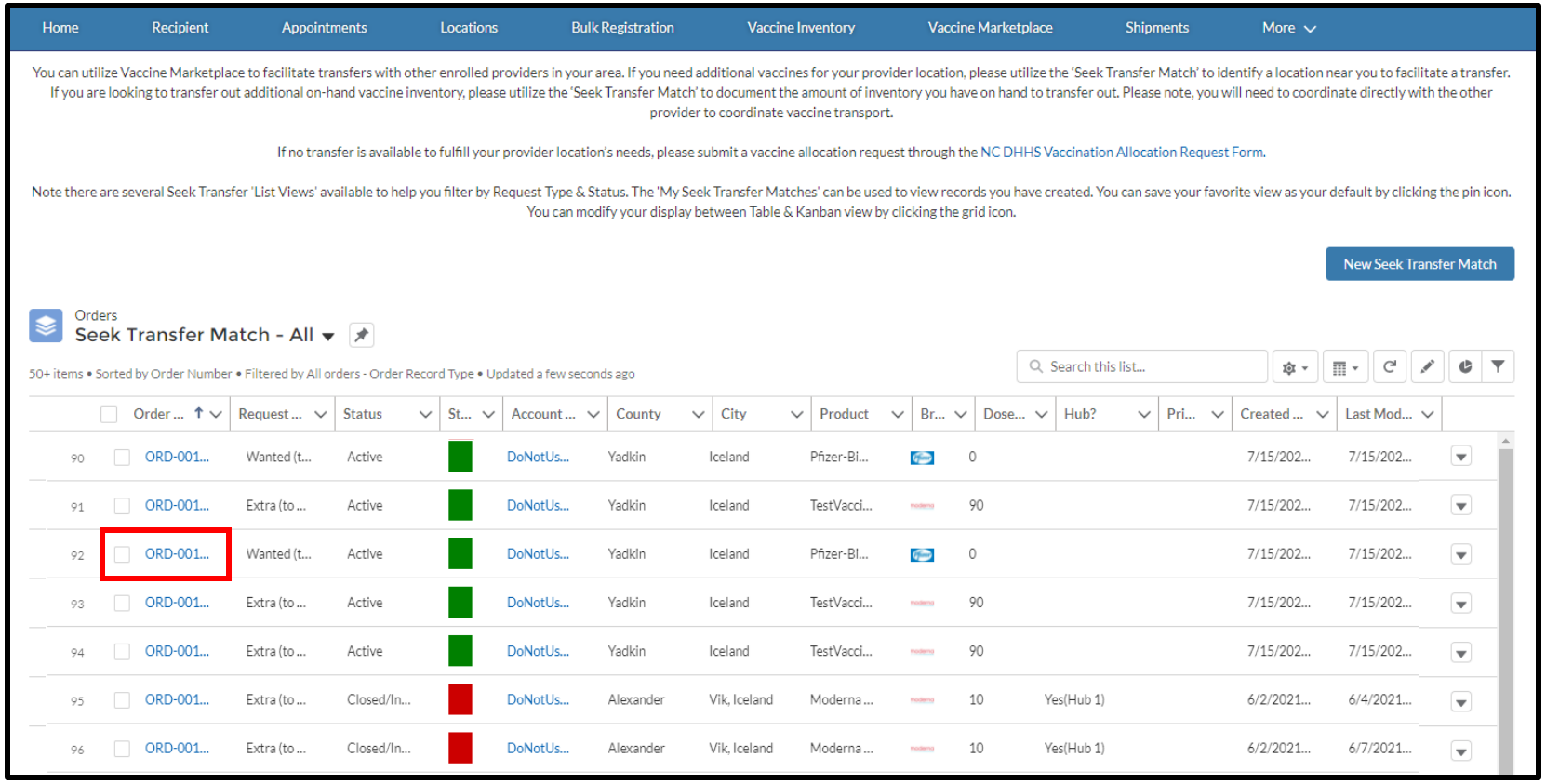

## Audience

**Healthcare Location Manager**

# Step 4 of 13: Select the Request that Match Your Offer

After sorting your results, navigate the list to find the inventory request that appears to best match the surplus inventory you have to offer.

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




## Audience

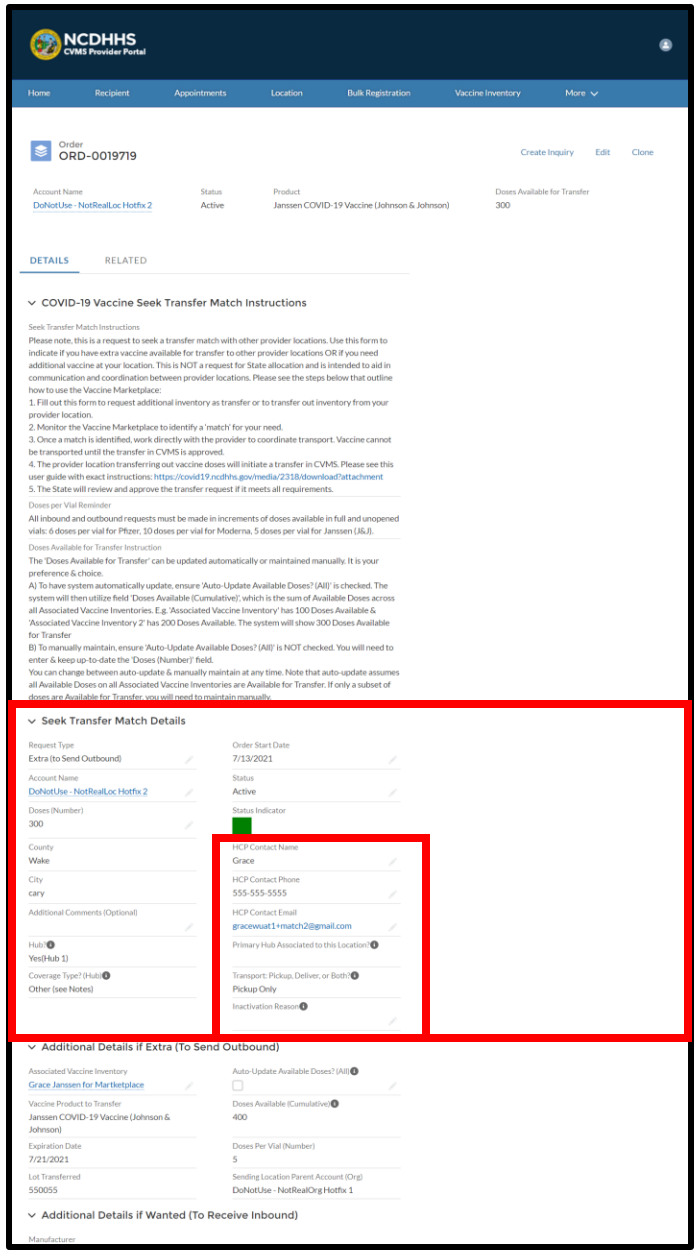
**Healthcare Location Manager**

# Step 5 of 13: 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



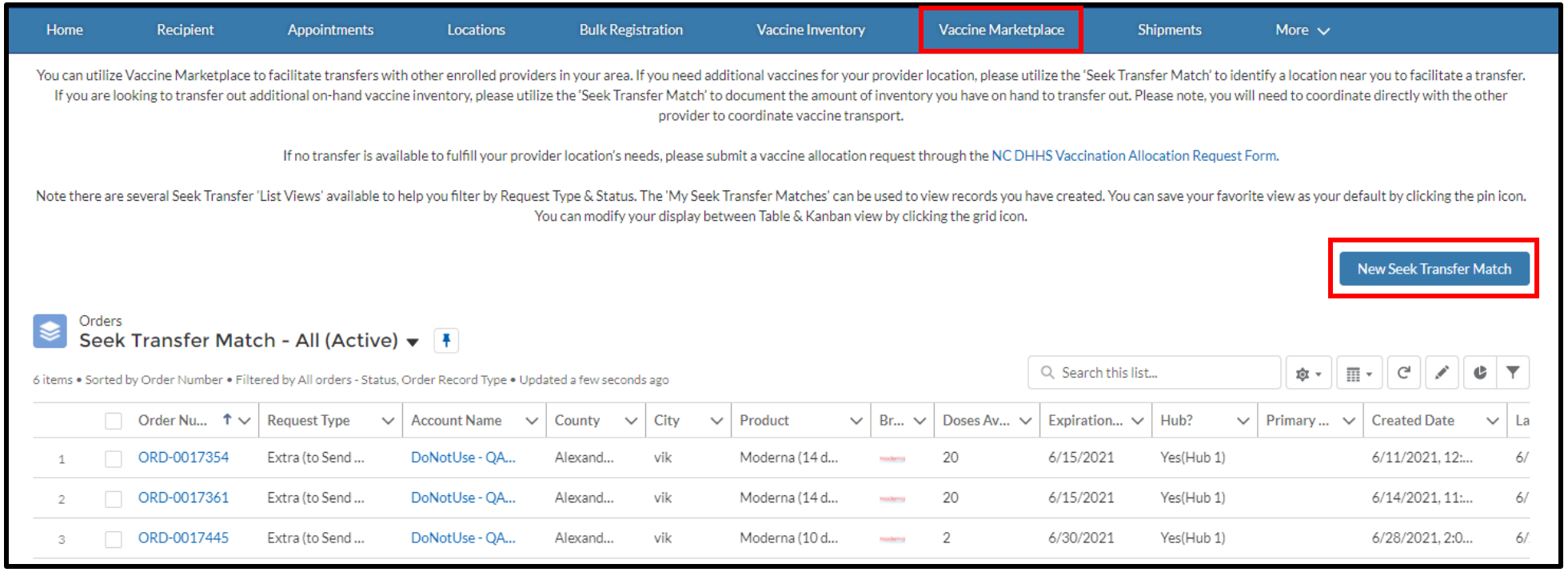

## Audience

**Healthcare Location Manager**

# Step 6 of 13: Initiate a 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**



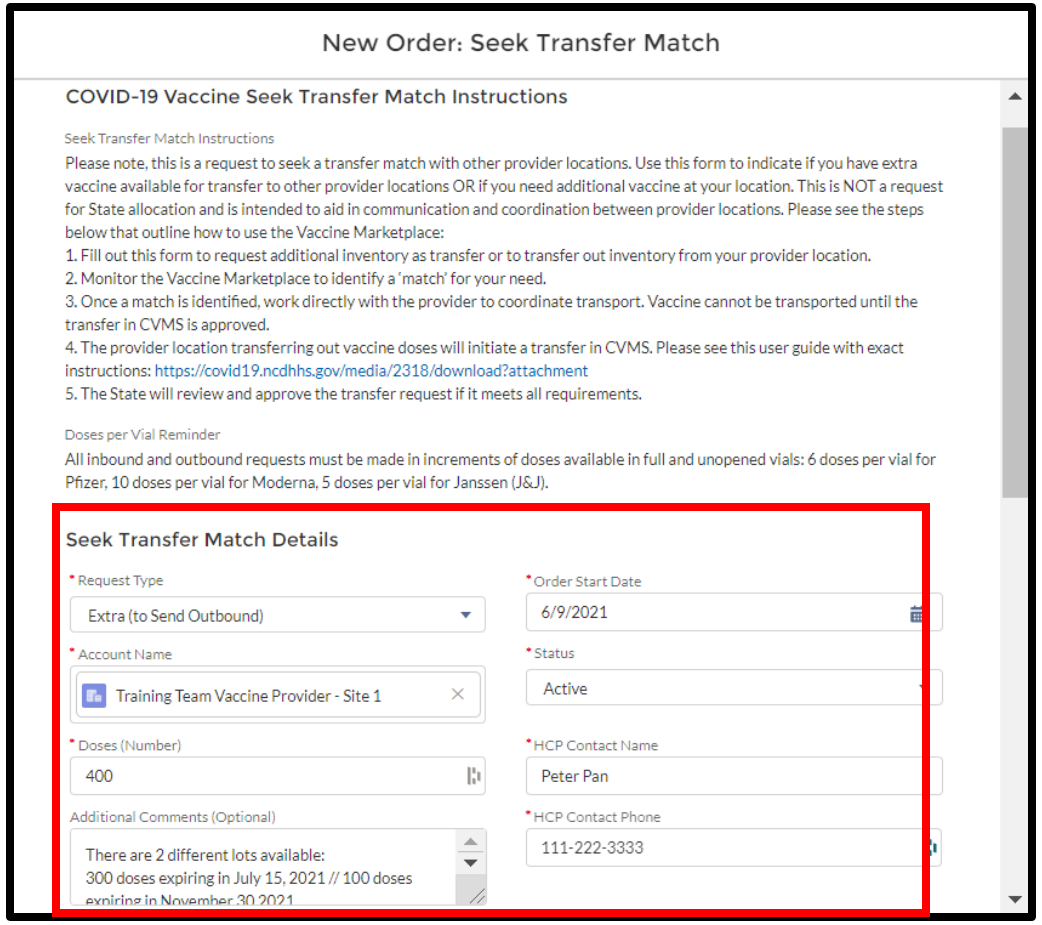

## Audience

**Healthcare Location Manager**

## Tips

Before placing a Seek Transfer Match, it is recommended that you contact your associated Hub to discuss your needs.

# Step 7 of 13: Start completing the "Seek Transfer Match" Form



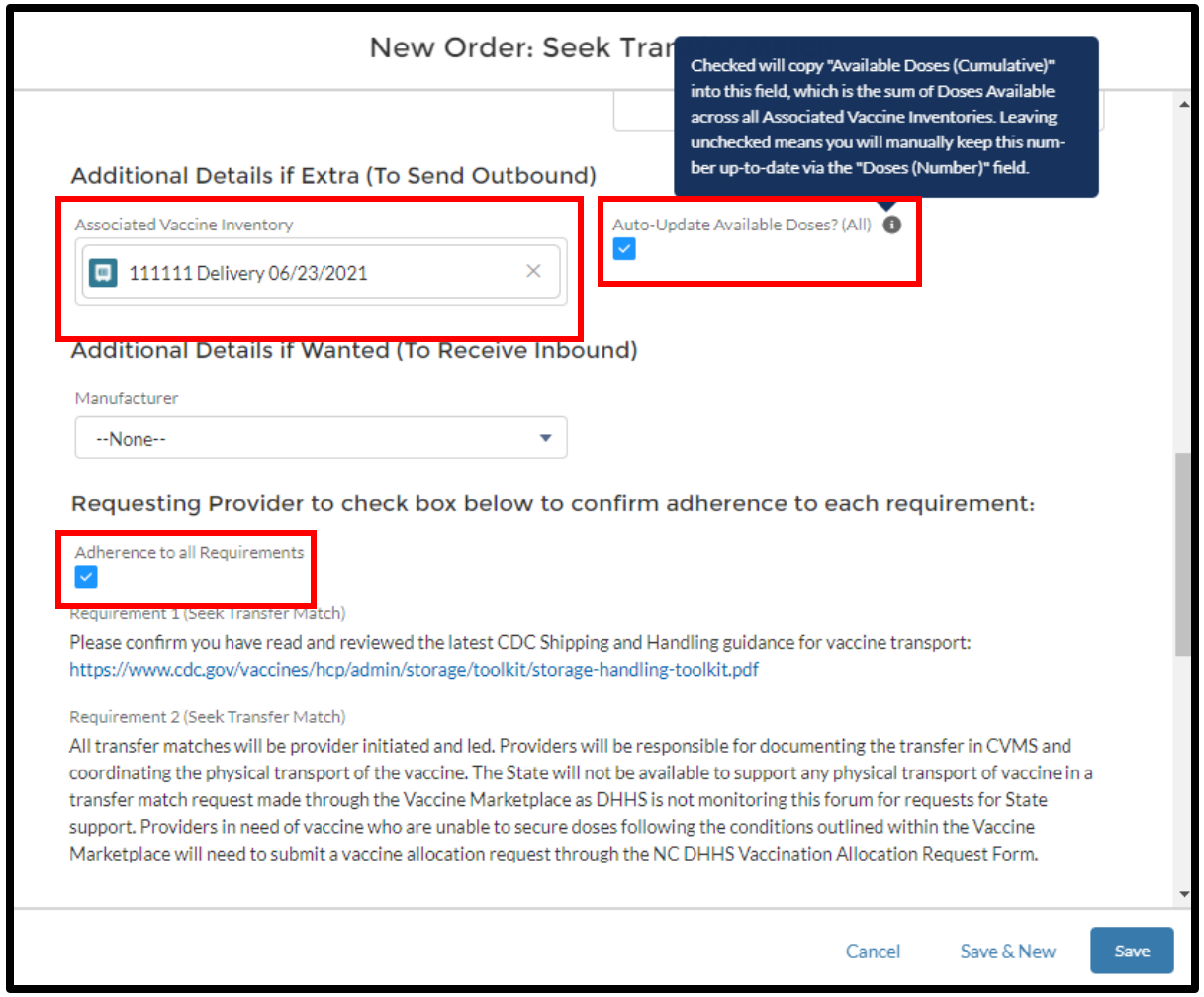

1. Read the instructions at the top of window
2. Complete the required fields:
   - **Request Type:** select "Extra (to Send Outbound)"
   - **Order Start Date:** enter today's date
   - **Account Name:** select your location account name
   - **Status:** select **ACTIVE**
   - **Doses:** enter the number 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"

**Audience**

**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Step 8 of 13: Select the Associated Inventory




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
   - **Auto-update Available Doses? (All):** (OPTIONAL) select this box if you would like to automatically update the available doses in the match based on doses available reflected in CVMS
   - **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them

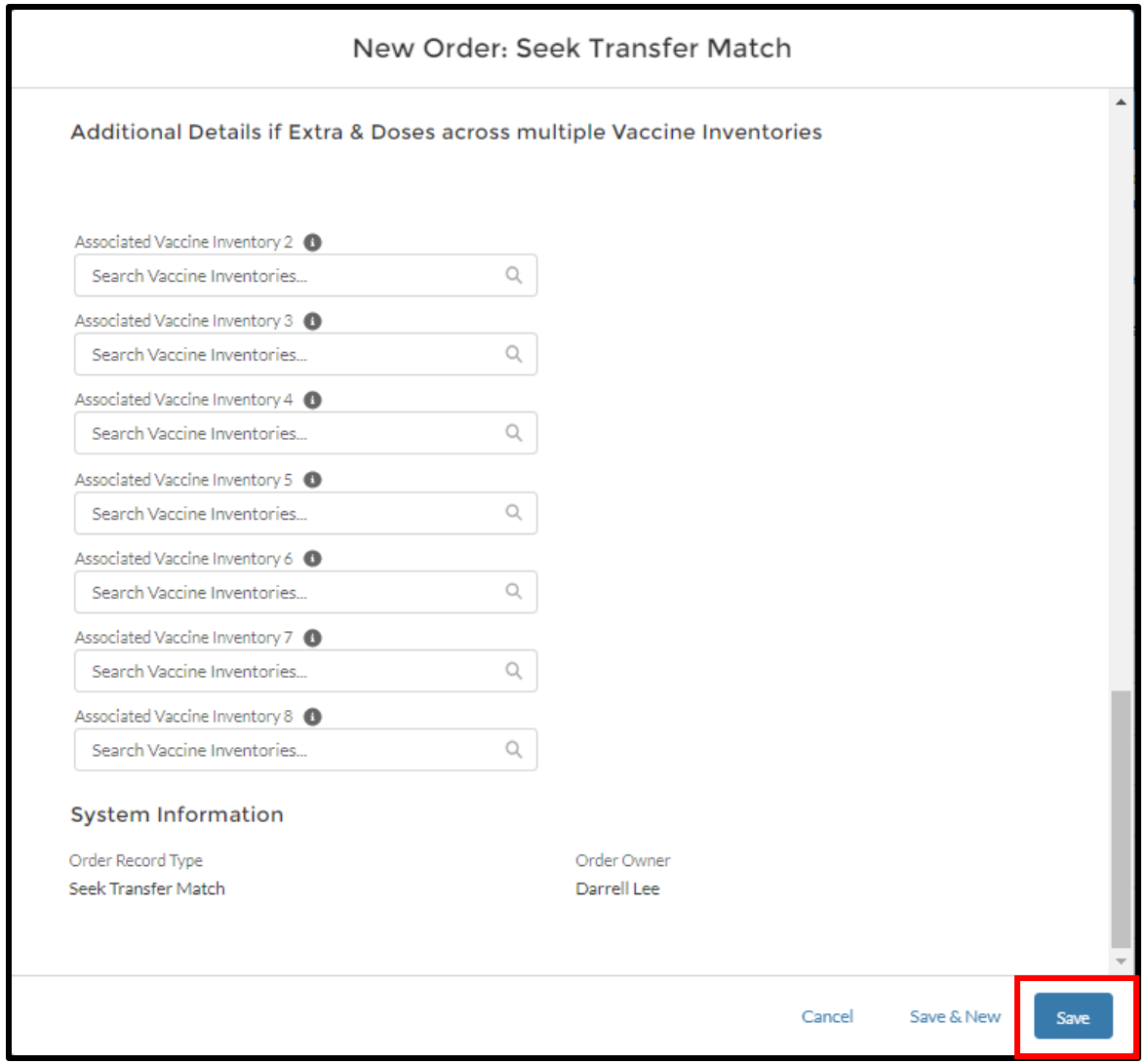
## Audience

**Healthcare Location Manager**

## Tips

Auto-updating available doses is optional. If you choose this option, the match will automatically update the available doses of your listing to reflect what is within CVMS. This can be especially helpful if you link multiple inventories to a single match, particularly if part of the inventory is used before the match is closed.

# Step 9 of 13: Submit the “Seek Transfer Match” Form




1. Enter any additional associated inventories (if an Extra Seek Transfer Match)
2. Click **SAVE**

## Audience

**Healthcare Location Manager**

## Tips

So long as the inventories are from the same lot and allocated by the State only, or the federal authority only, you can combine inventories to create a single Extra Seek Transfer Match instead of having to create multiple matches.

# Step 10 of 13: Receive an Inquiry from Another Provider

Sandbox: COVID-19 Vaccine Marketplace Inquiry

NC CVMS <nccvms@dhhs.nc.gov>
To Digangi, Steve
7:21 PM

NCDHHS
COVID-19 Response

**NC Department of Health and Human Services**

Hello Steve,

Please see below for details of a Marketplace Inquiry from another Account regarding one of your COVID-19 Vaccine Marketplace 'Seek Transfer Match' requests.

Request Details:

- **Requesting Account Name:** DoNotUse-NotReaLoc Hotfix 1
- **Created Date:** 7/15/2021
- **Inquiry ID:** MKTINQ-0083
- **Doses:** 50
- **Manufacturer:** Moderna (14 doses/vial) COVID-19 Vaccine
- **Lot:** 19128
- **Contact Name:** Bill
- **Contact Number:** 444-555-6666
- **Contact Email:** billy@mailinator.com
- **Transportation Request:** Receiving Location to Pickup
- **Address:** Road
  Vik, North Carolina 00000
  County: Unknown
- **Additional Details:**
- **Status:** Open
- **Requested from Account:** DoNotUse-NotReaLoc Hotfix 1
- **Hub (Requested from Account):** Hub 1
- **Hub (Requesting Account):** Hub 1

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

If another provider is interested in the COVID-19 vaccines that you are offering, you might receive an email with the details of their need, their address, and other information.

This e-mail is the result of a provider inquiry in CVMS.

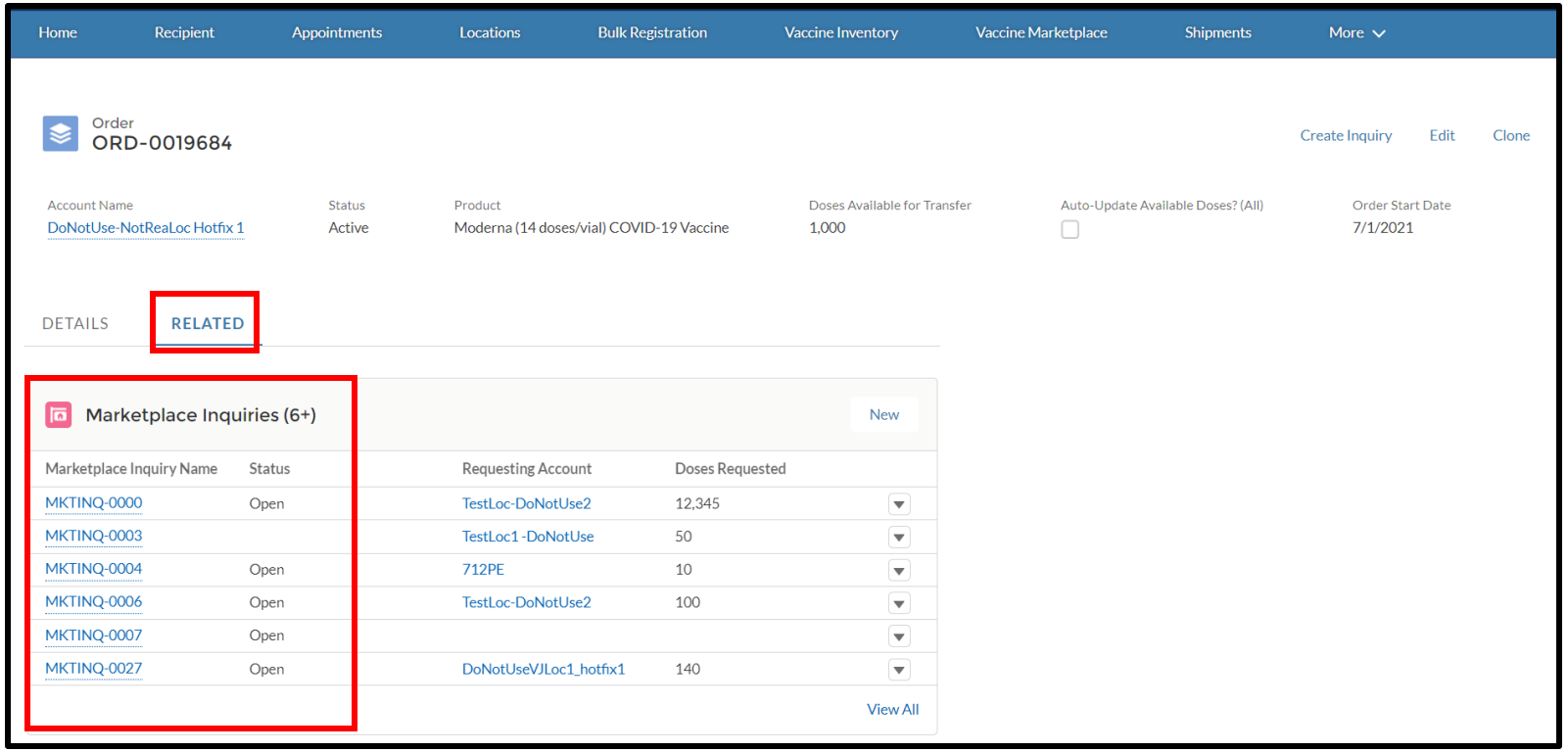
**Audience**

**Healthcare Location Manager**

# Step 11 of 13: View the Inquiry in CVMS

You can see all the inquiries you received on a listing. To do so,

1. Open the listing record in the **VACCINE MARKETPLACE**
2. Click on the **RELATED** tab
3. View the list of Marketplace Inquiries
4. Open them by clicking on the Marketplace Inquiry Name Link

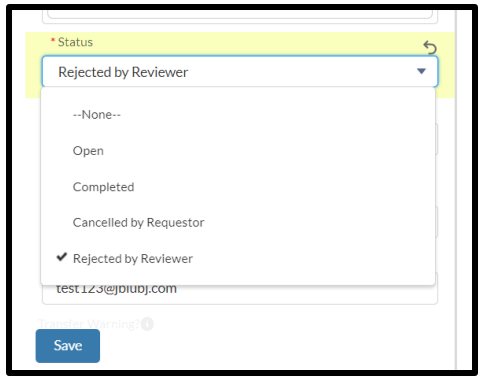



## Audience

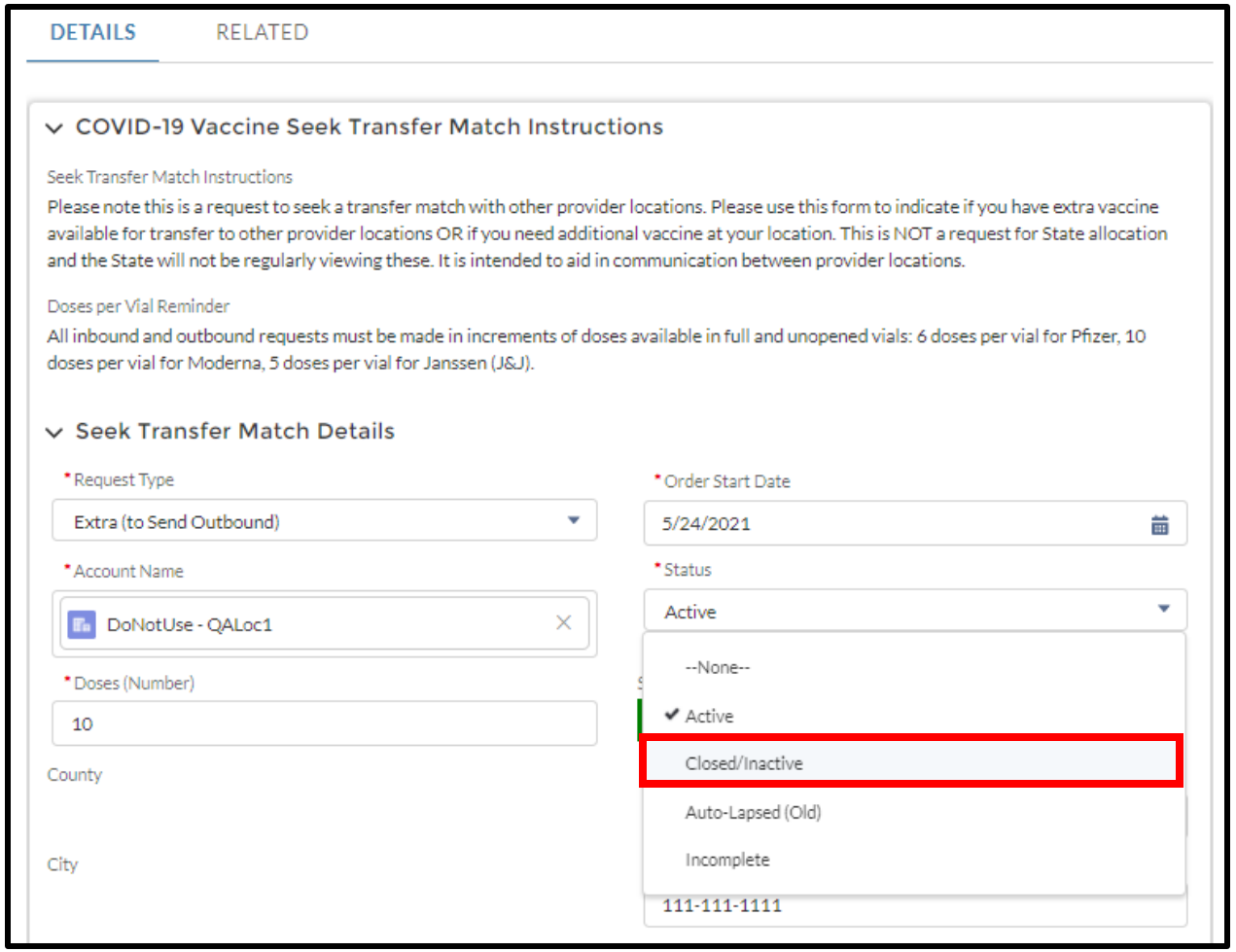
**Healthcare Location Manager**

## Tips

Once you contacted the inquirer, you can **EDIT** the **INQUIRY** and update the status to **COMPLETED** or **REJECTED BY REVIEWER**.



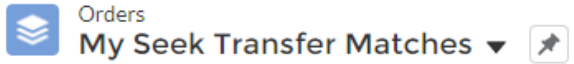
# Step 12 of 13: Close Your Listing




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 in this user guide).

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**

## Audience

**Healthcare Location Manager**

## Tips

Your form will automatically change to an auto-lapsed status after 21 days. To extend, see the section named "Maintain Your Requests Posted in the Vaccine Marketplace". The auto-lapse email will go to the email address associated to your NCID, not the email you enter in the form.

# Step 13 of 13: Set Inactivation Reason

Seek Transfer Match Details

*Request Type: Extra (to Send Outbound)

*Order Start Date: 7/1/2021

*Account Name: DoNotUse-NotReaLoc Hotfix 1

*Status: Closed/Inactive

Doses (Number): 1,000

Status Indicator

County: Unknown

*HCP Contact Name: Nicole HCP Tester

City: Vik

*HCP Contact Phone: 800-128-4219

Additional Comments (Optional)

*HCP Contact Email: joshuakemp85@gmail.com

Hub? Yes(Hub 1)

Primary Hub Associated to this Location?

Coverage Type? (Hub) Regional

Transport: Pickup, Deliver, or Both? Pickup Only

Inactivation Reason: --None--

- Completed (single Transfer)
- Completed (multiple Transfers)
- Fulfilled w/o using Marketplace
- Unfulfilled or No longer applicable
- Created in Error
- Auto-Lapsed (Weeks w/o Modification)
- Auto-Lapsed (Expiration Date past)

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory: Delivery 06/14/2021

Vaccine Product to Transfer: Moderna (14 doses/vial) COVID-19 Vaccine

Expiration Date: 8/31/2021

Lot Transferred: 19128

Sending Location Parent Account (Org): DoNotUse - NotRealOrg Hotfix 1

Additional Details if Wanted (To Recei

Cancel | Save

When the seek transfer match is closed, identify the reason. Navigate to the **Vaccine Marketplace** tab

1. Navigate to the **INACTIVATION REASON**
2. Open the pick list
3. Select the appropriate reason
4. Click **SAVE**

## Audience

**Healthcare Location Manager**

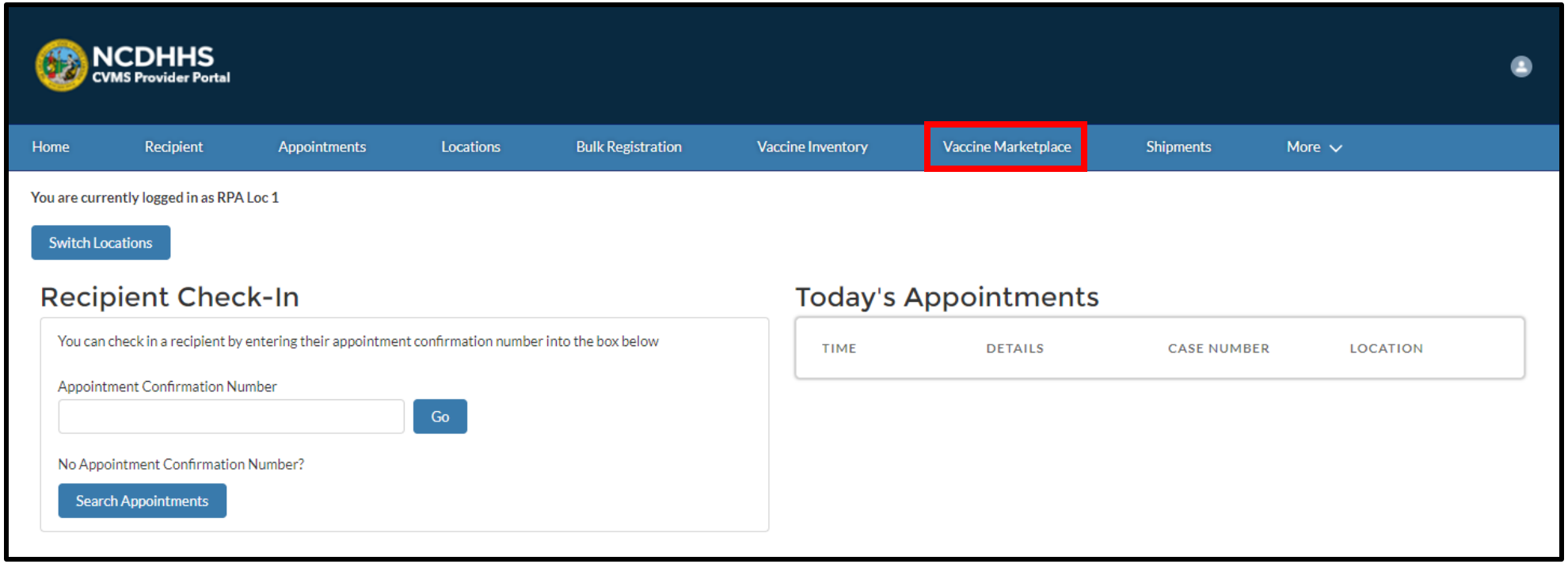
NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Request Additional Vaccines

# Step 1 of 16: Navigate to the Vaccine Marketplace

If you need additional COVID-19 vaccine doses, first check in the Vaccine Marketplace if your assigned Hub can support you. If not, 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**

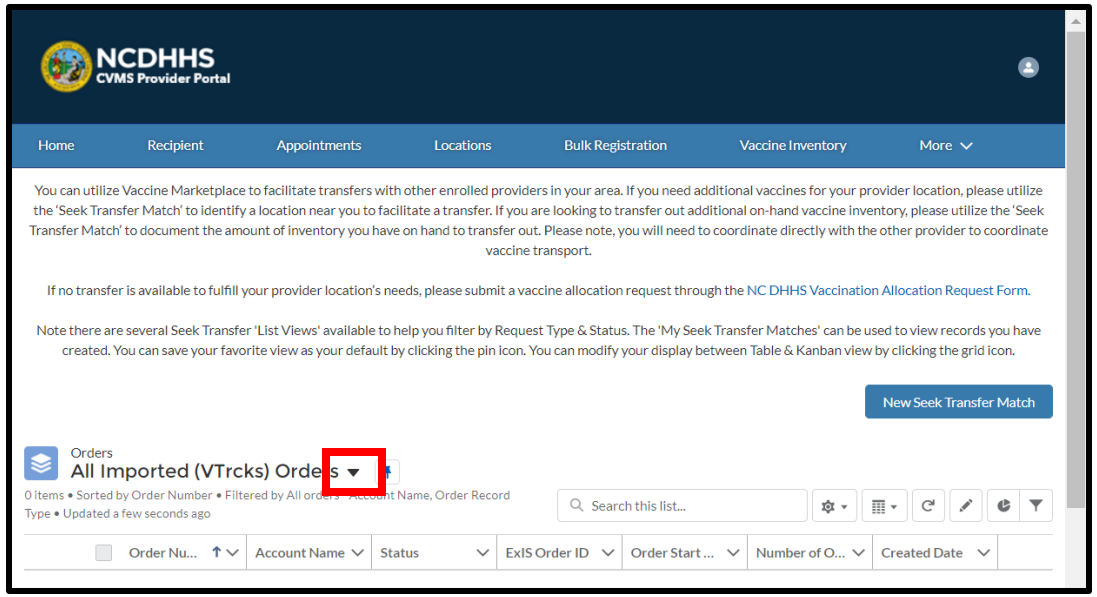



**Audience**

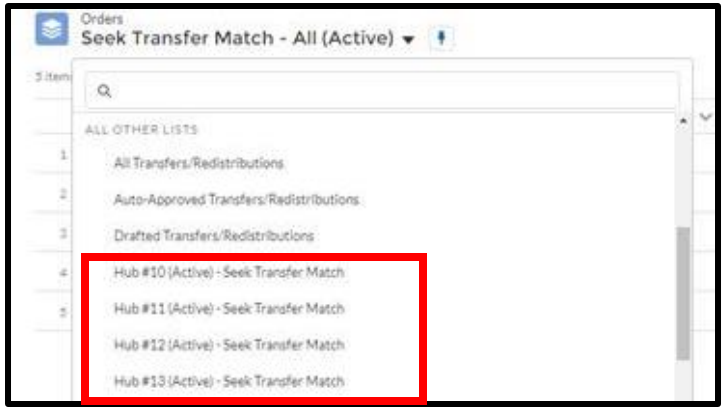
**Healthcare Location Manager**

# Step 2 of 16: View All Available And Active Listings Posted By Your Assigned Hub

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




2. Select **HUB#? (ACTIVE) - SEEK TRANSFER MATCH** of your assigned HUB




## Audience

**Healthcare Location Manager**

## Tips

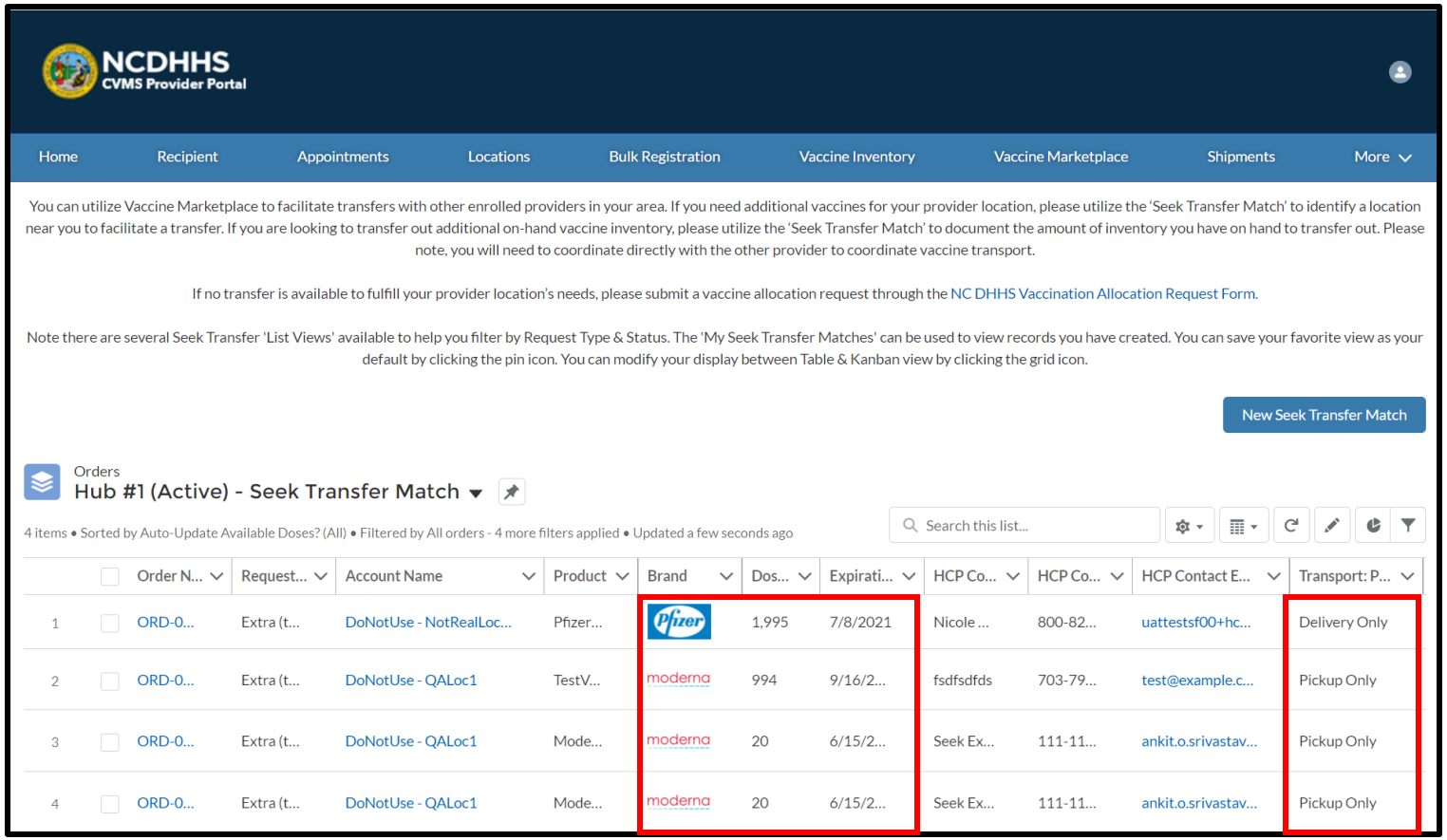
To always see the available and active requests posted by your assigned HUB, set the view to the correct **HUB#? (ACTIVE) - SEEK TRANSFER MATCH and** use the pin icon to set this as your default view.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Step 3 of 16: Check if your Assigned Hub is Offering the Vaccine you Seek

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

1. Check the Brands, quantities available, Transport solution proposed by the Hub Location



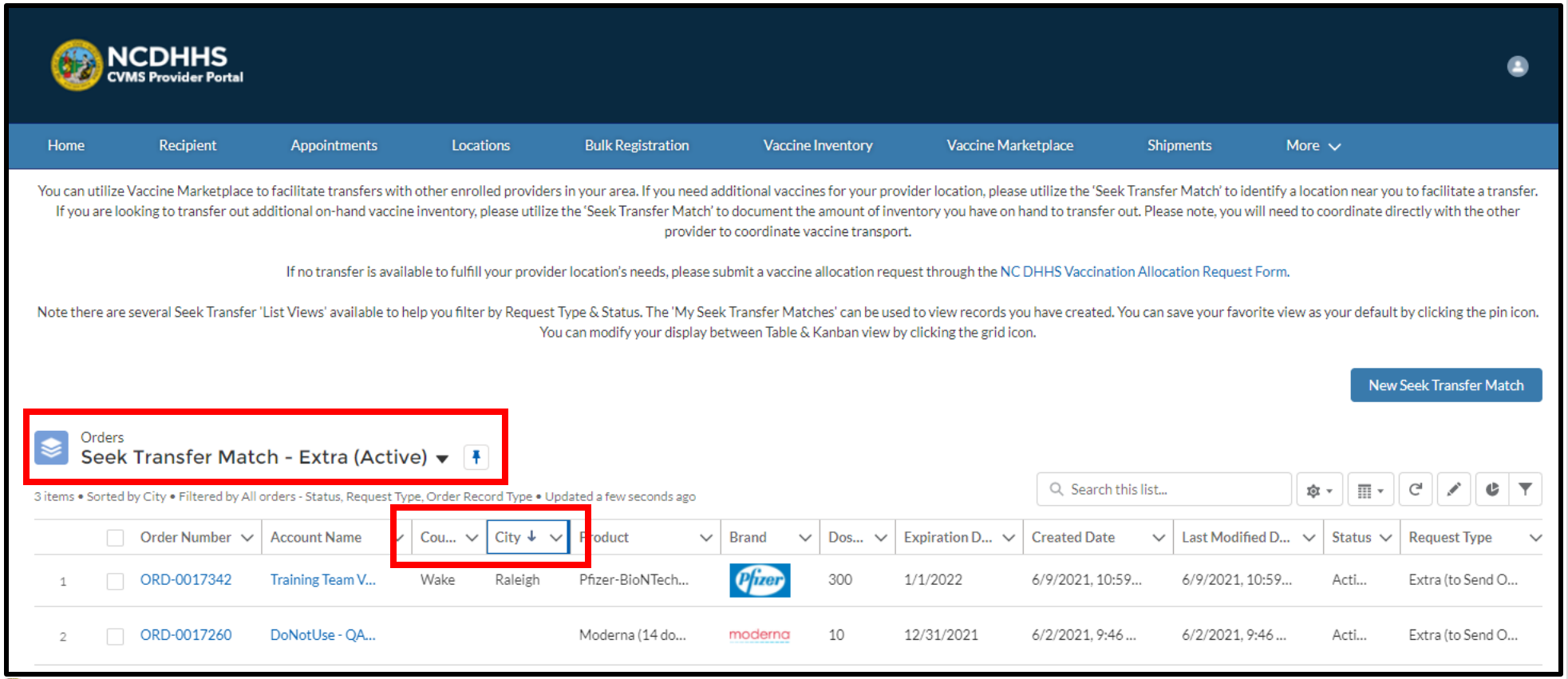

## Audience

**Healthcare Location Manager**

# Step 4 of 16: Sort Inventories by Location

If your Hub offers do not match your need, check listings posted by other providers near your location.

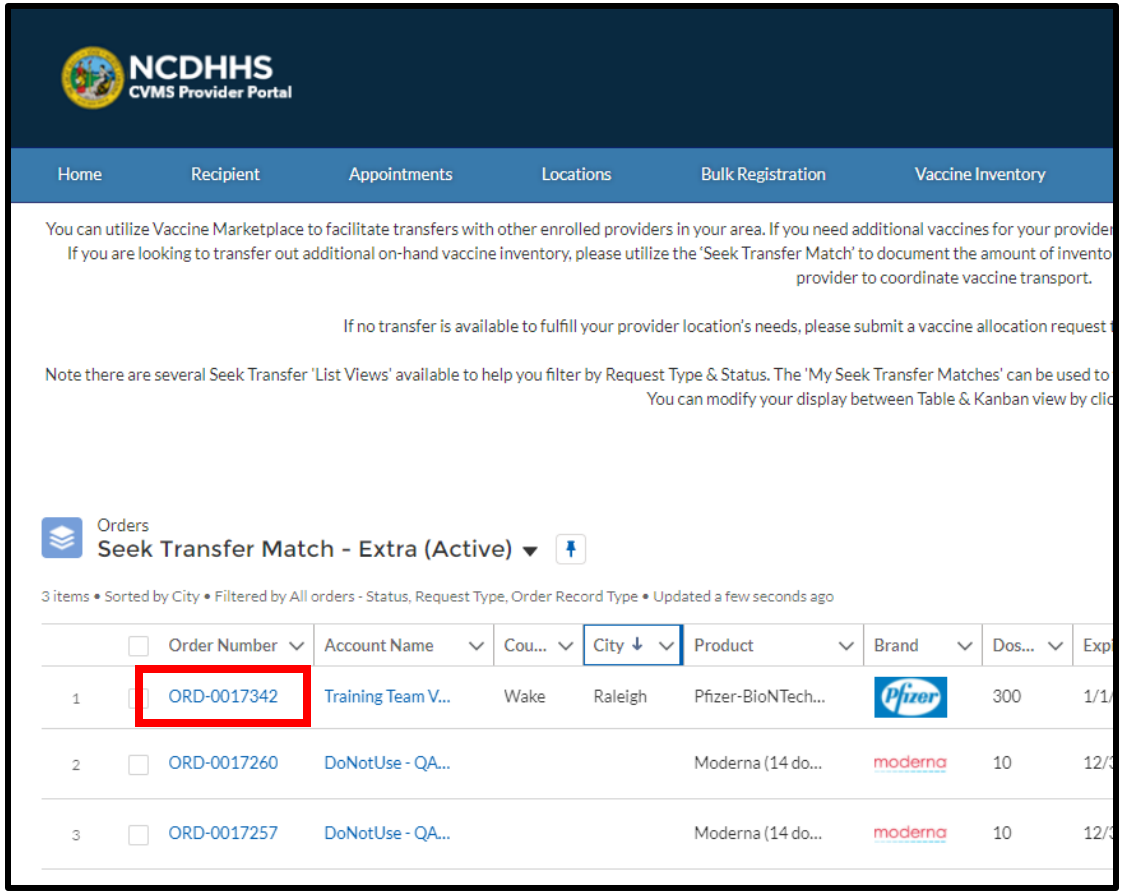
1. Filter the Vaccine Marketplace on **SEEK TRANSFER MATCH – EXTRA (Active)**
2. Click on the Header Row fields **CITY** or **COUNTY** to sort the records in ascending or descending order by location




**Audience**

**Healthcare Location Manager**

# Step 5 of 16: Select the Request that Matches Your Need




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

## Audience

**Healthcare Location Manager**

# Step 6 of 16: Review the Listing

Review the listing to see if it matches what you are looking for.

NCDHHS
CVMS Provider Portal

Home | Recipient | Appointments | Location | Bulk Registration | Vaccine Inventory | More

Order
ORD-0019719

Create Inquiry | Edit | Clone

| Account Name | Status | Product | Doses Available for Transfer |
|---|---|---|---|
| DoNotUse - NotRealLoc Hotfix 2 | Active | Janssen COVID-19 Vaccine (Johnson & Johnson) | 300 |

DETAILS | RELATED

**COVID-19 Vaccine Seek Transfer Match Instructions**

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: https://covid19.ncdhhs.gov/media/2318/download?attachment
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Doses Available for Transfer Instruction

The 'Doses Available for Transfer' can be updated automatically or maintained manually. It is your preference & choice.

A) To have system automatically update, ensure 'Auto-Update Available Doses? (All)' is checked. The system will then utilize field 'Doses Available (Cumulative)', which is the sum of Available Doses across all Associated Vaccine Inventories. E.g. 'Associated Vaccine Inventory' has 100 Doses Available & 'Associated Vaccine Inventory 2' has 200 Doses Available. The system will show 300 Doses Available for Transfer

B) To manually maintain, ensure 'Auto-Update Available Doses? (All)' is NOT checked. You will need to enter & keep up-to-date the 'Doses (Number)' field.

You can change between auto-update & manually maintain at any time. Note that auto-update assumes all Available Doses on all Associated Vaccine Inventories are Available for Transfer. If only a subset of doses are Available for Transfer, you will need to maintain manually.

**Seek Transfer Match Details**

| | |
|---|---|
| Request Type: Extra (to Send Outbound) | Order Start Date: 7/13/2021 |
| Account Name: DoNotUse - NotRealLoc Hotfix 2 | Status: Active |
| Doses (Number): 300 | Status Indicator |
| County: Wake | HCP Contact Name: Grace |
| City: cary | HCP Contact Phone: 555-555-5555 |
| Additional Comments (Optional) | HCP Contact Email: gracewuat1+match2@gmail.com |
| Hub: Yes(Hub 1) | Primary Hub Associated to this Location |
| Coverage Type? (Hub): Other (see Notes) | Transport: Pickup, Deliver, or Both?: Pickup Only |
| | Inactivation Reason |

**Additional Details if Extra (To Send Outbound)**

| | |
|---|---|
| Associated Vaccine Inventory: Grace Janssen for Martketplace | Auto-Update Available Doses? (All) |
| Vaccine Product to Transfer: Janssen COVID-19 Vaccine (Johnson & Johnson) | Doses Available (Cumulative): 400 |
| Expiration Date: 7/21/2021 | Doses Per Vial (Number): 5 |
| Lot Transferred: 550055 | Sending Location Parent Account (Org): DoNotUse - NotRealOrg Hotfix 1 |

**Additional Details if Wanted (To Receive Inbound)**

Manufacturer

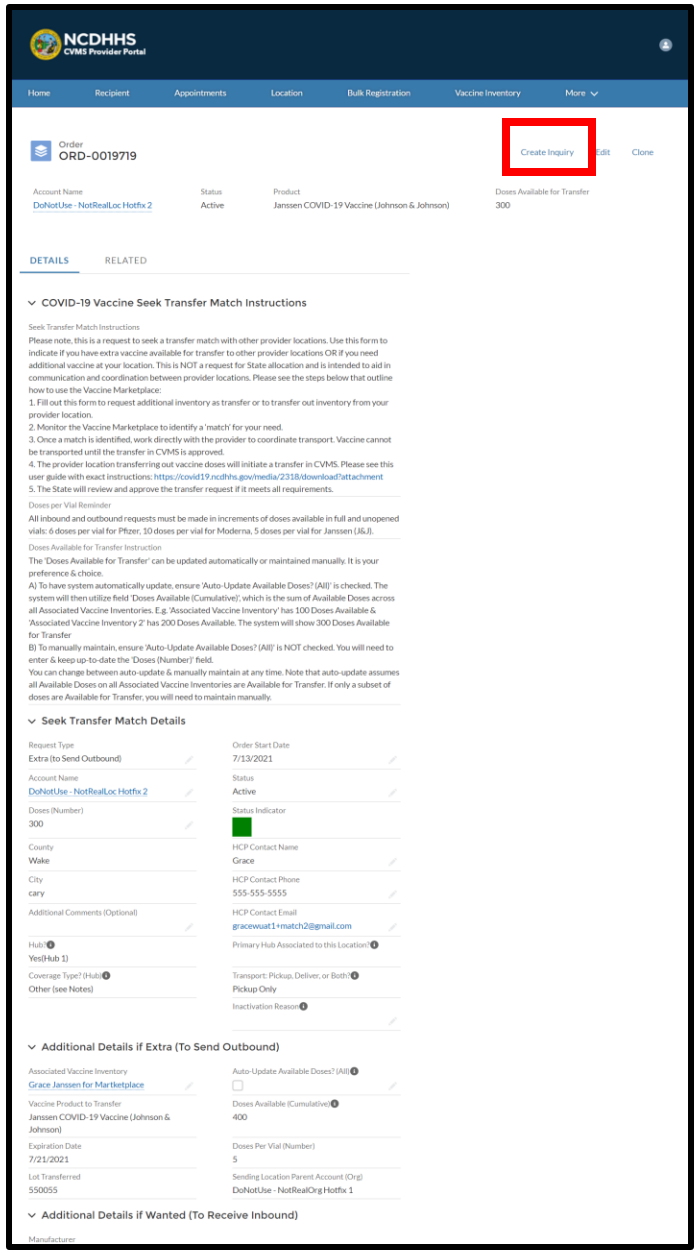
## Audience

**Healthcare Location Manager**

# Step 7 of 16: Contact the Listing Author

If this listing is offering what you are looking for, you can contact them within the tool. The author of the listing will receive your message by email:

1. From the listing, navigate to the top of the page and click **CREATE INQUIRY**



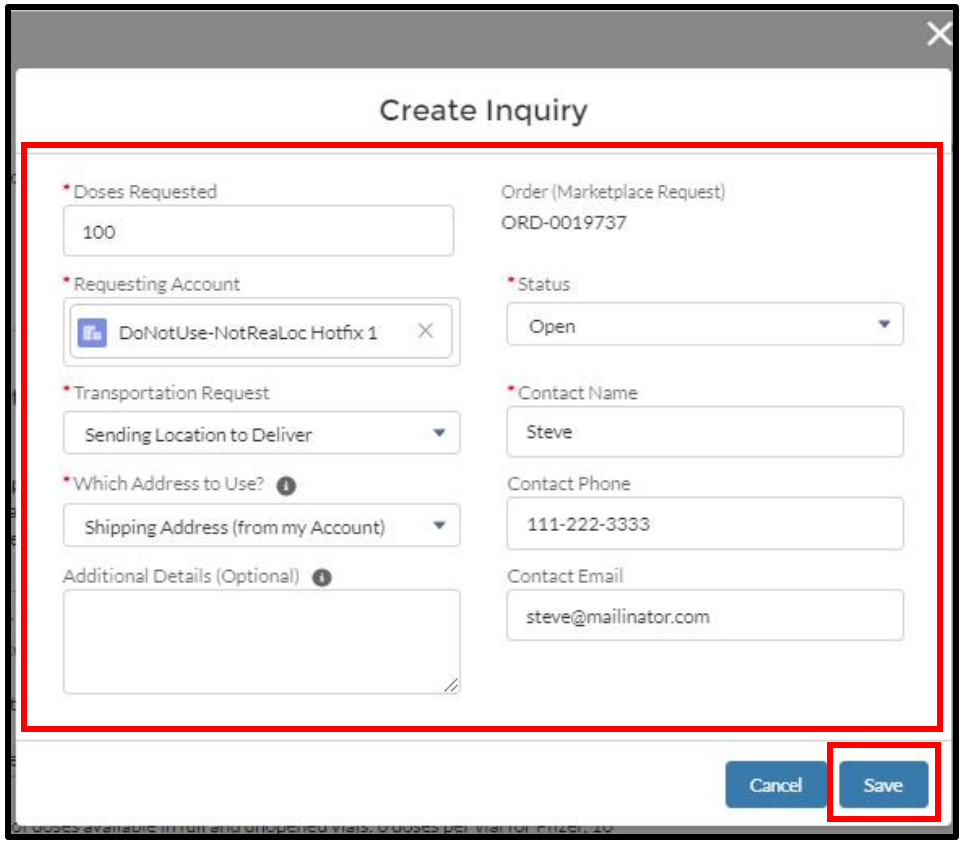

## Audience

**Healthcare Location Manager**

## Tips

It is possible to contact the HCP contact directly with the information provided on the seek transfer match.

# Step 8 of 16: Complete the Inquiry




1. Complete the following fields
   - Doses requested
   - Requesting Account
   - Status (should be set to **OPEN)**
   - Transportation Request
   - Contact Name
   - Address (can either select the address associated with the account or enter another address in the **ADDITIONAL DETAILS**)
   - Contact phone (optional)
   - Contact e-mail (optional)

2. Click **SAVE**

**Audience**

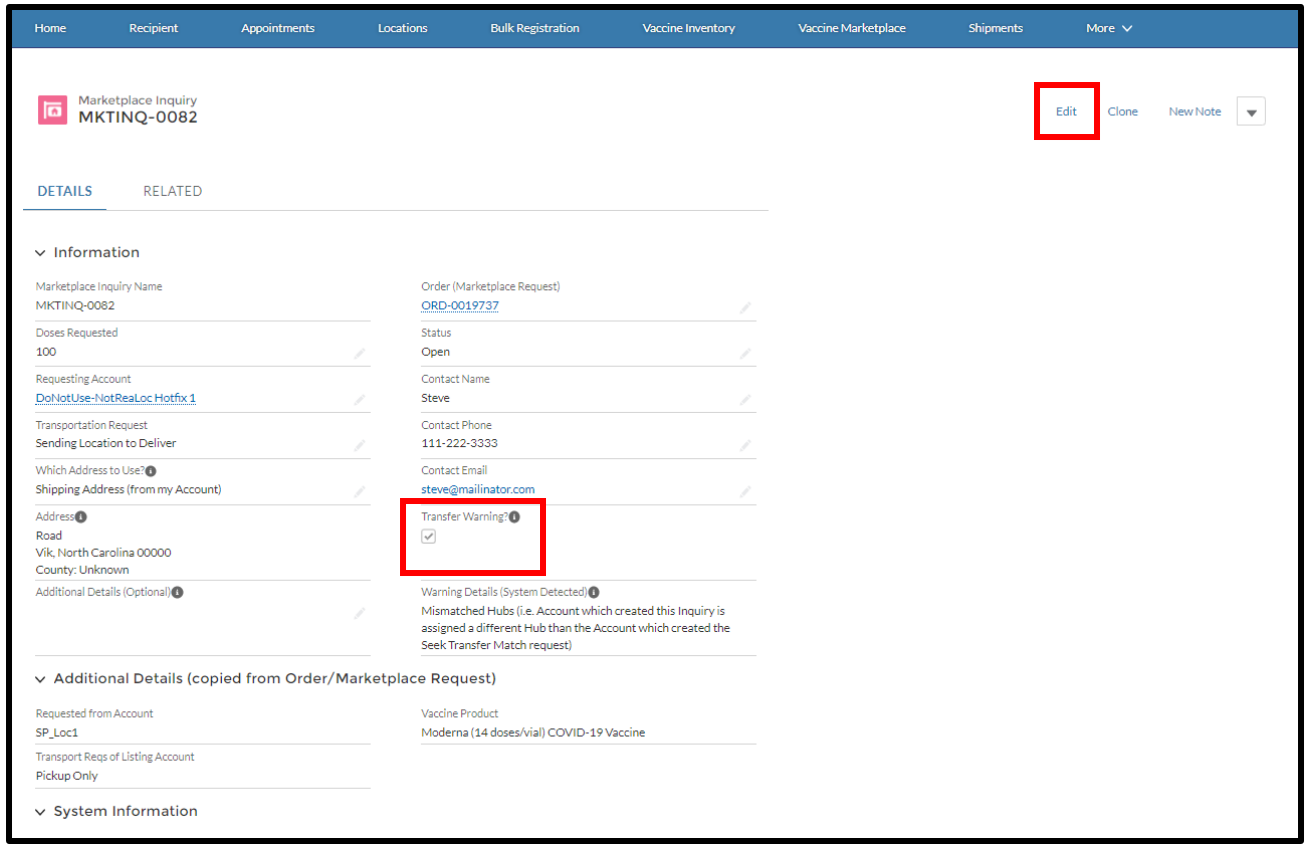
**Healthcare Location Manager**

**Tips**

Use the **ADDITIONAL DETAILS** section to fully describe your needs.

# Step 9 of 16: Review the Inquiry

Review your inquiry. Pay special attention to the **TRANSFER WARNING?** box. If checked, CVMS has determined that the inquiry is going to a provider not associated with the same hub as you. This only serves as a visual warning and will not prevent the inquiry or potential transfer for taking place. If any changes are needed, the inquiry can be edited by clicking **EDIT** in the upper right-hand corner.




## Audience

**Healthcare Location Manager**

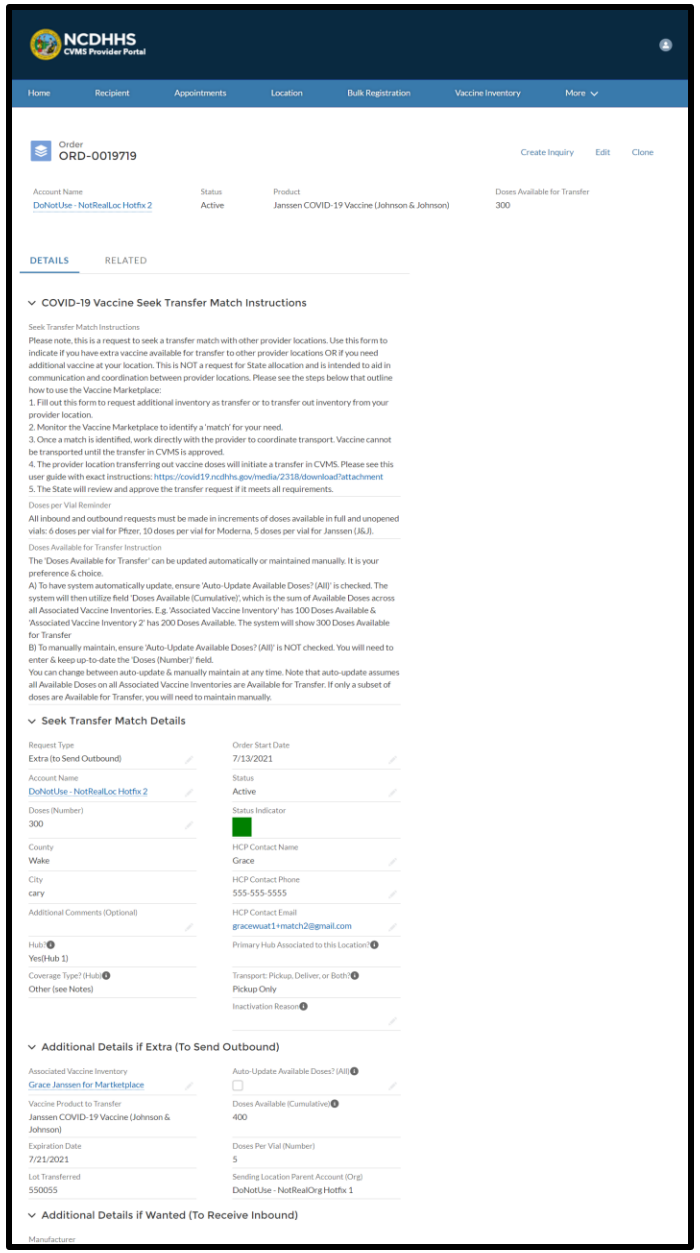
# Step 10 of 16: Review the Inventory Details

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).

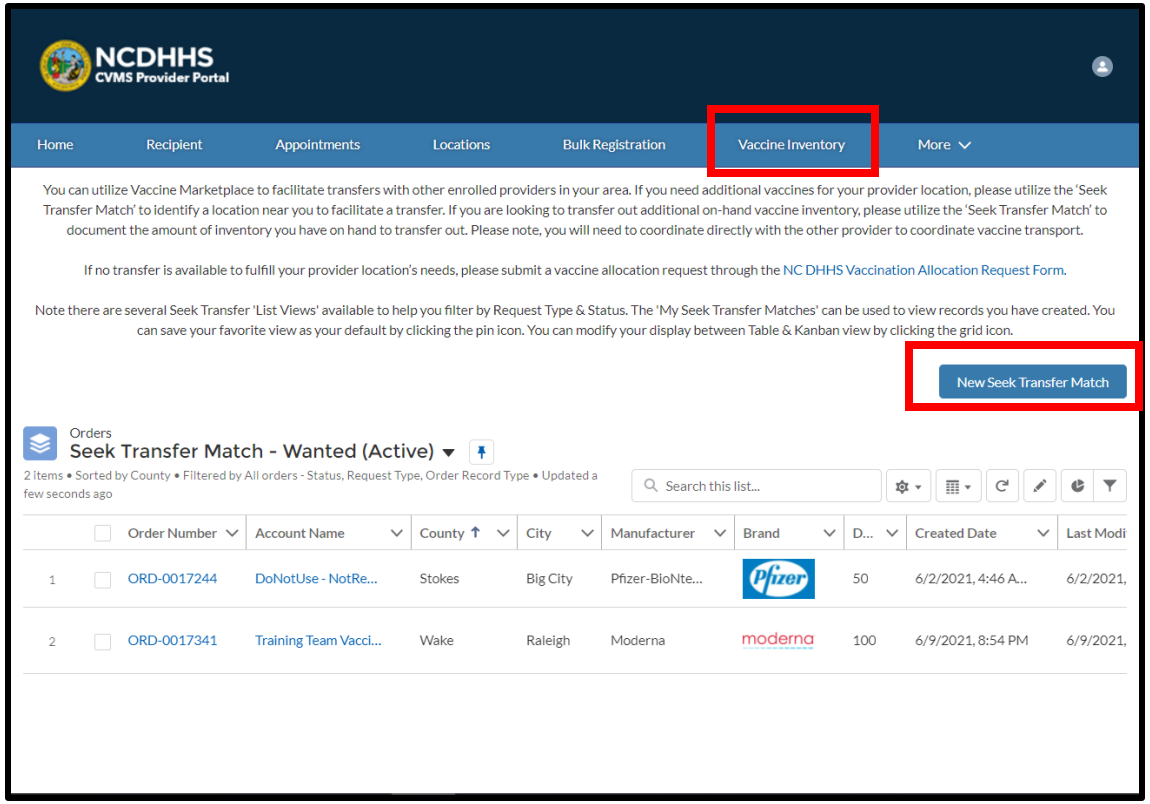



## Audience

**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Step 11 of 16: Initiate a New Seek Transfer Match



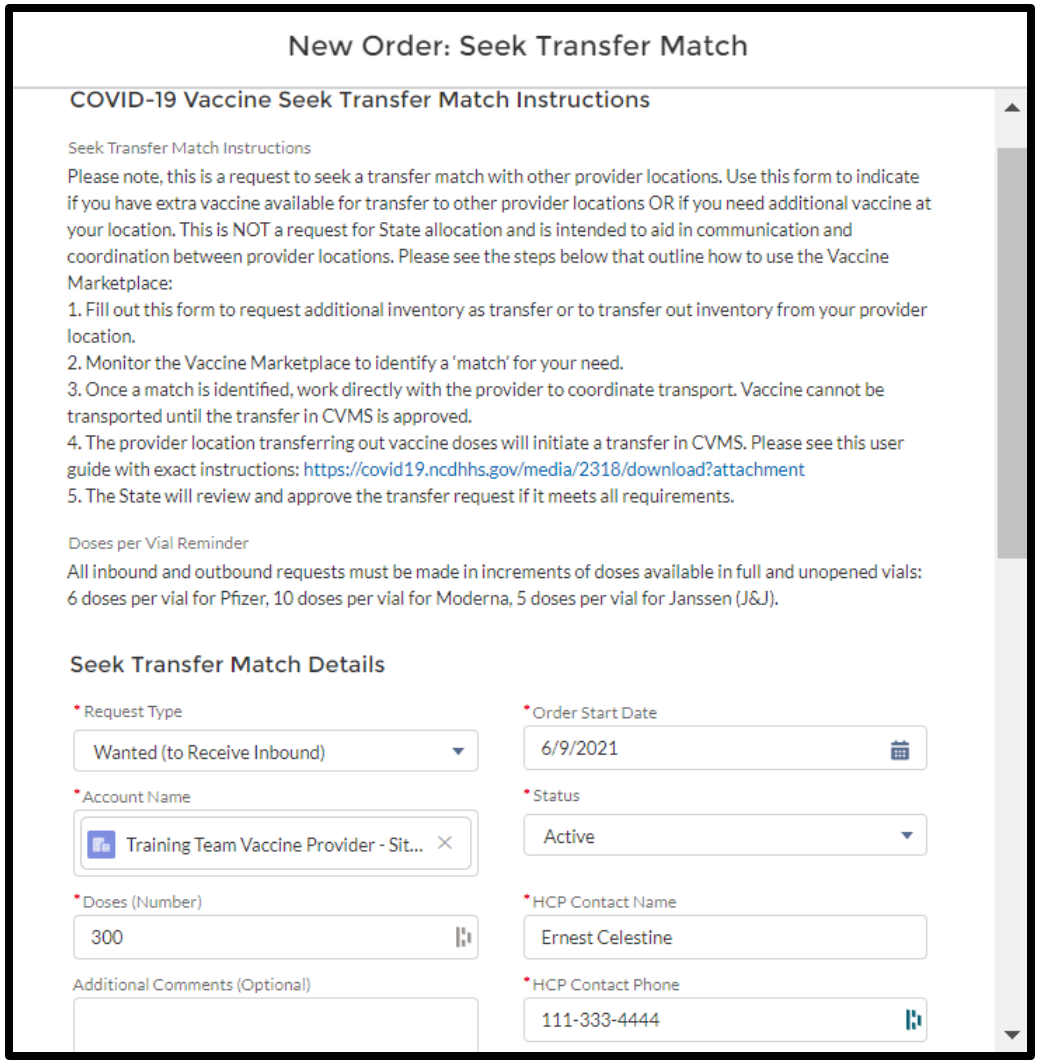

If no provider is offering the type of COVID-19 vaccine product you are seeking, post a **WANTED** request in the Vaccine Marketplace to let other providers know that you can are seeking additional COVID-19 vaccine doses.

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

## Audience

**Healthcare Location Manager**

# Step 12 of 16: Start completing the "Seek Transfer Match" Form



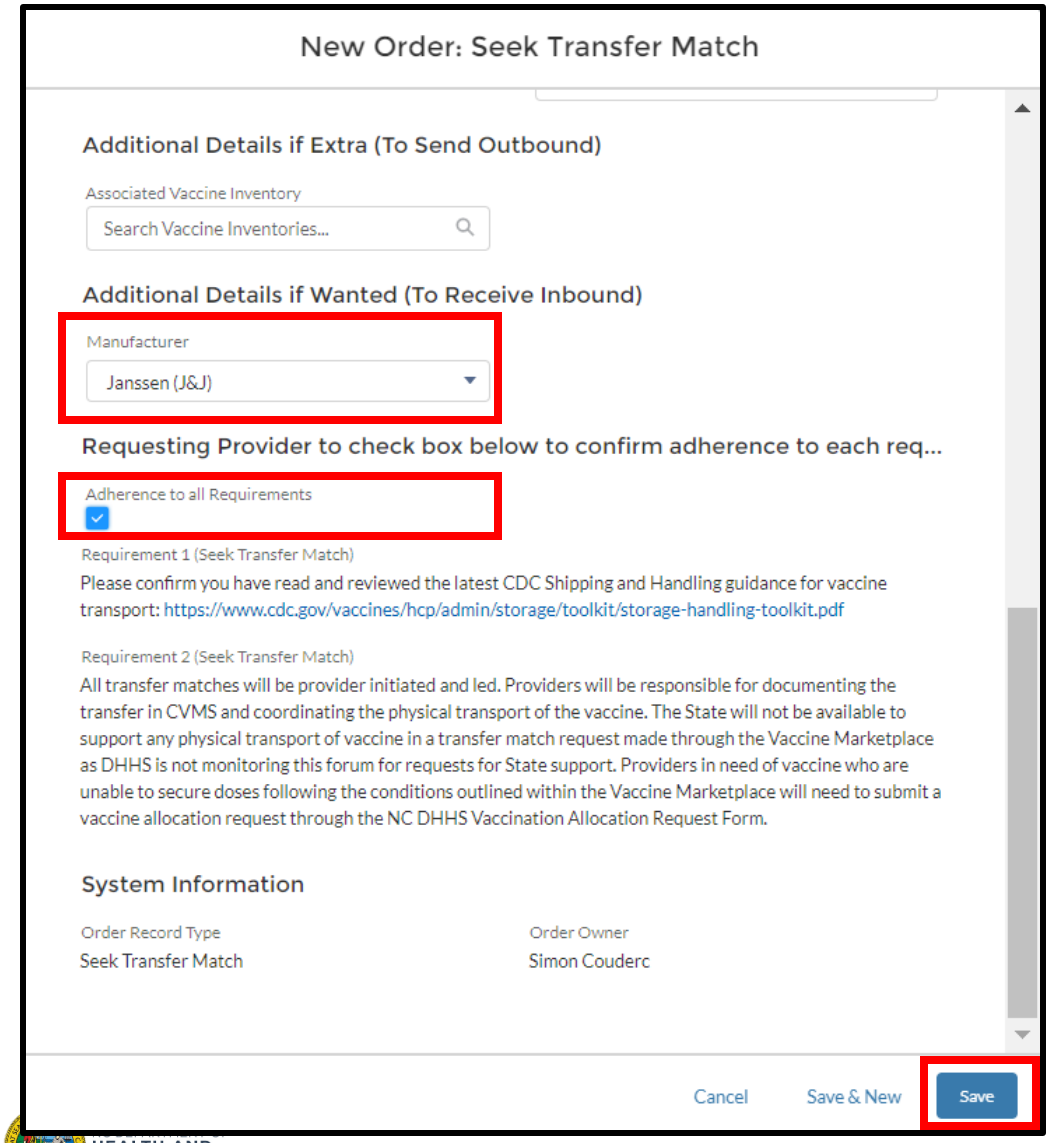

1. Read the instructions at the top of window
2. Complete the required fields:
   - **Request Type:** select "Wanted (to Receive Inbound)"
   - **Order Start Date:** enter today's date
   - **Account Name:** select your location account name
   - **Status:** select **ACTIVE**
   - **Doses:** enter the 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

**Audience**

**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Step 13 of 16: 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**

## Audience

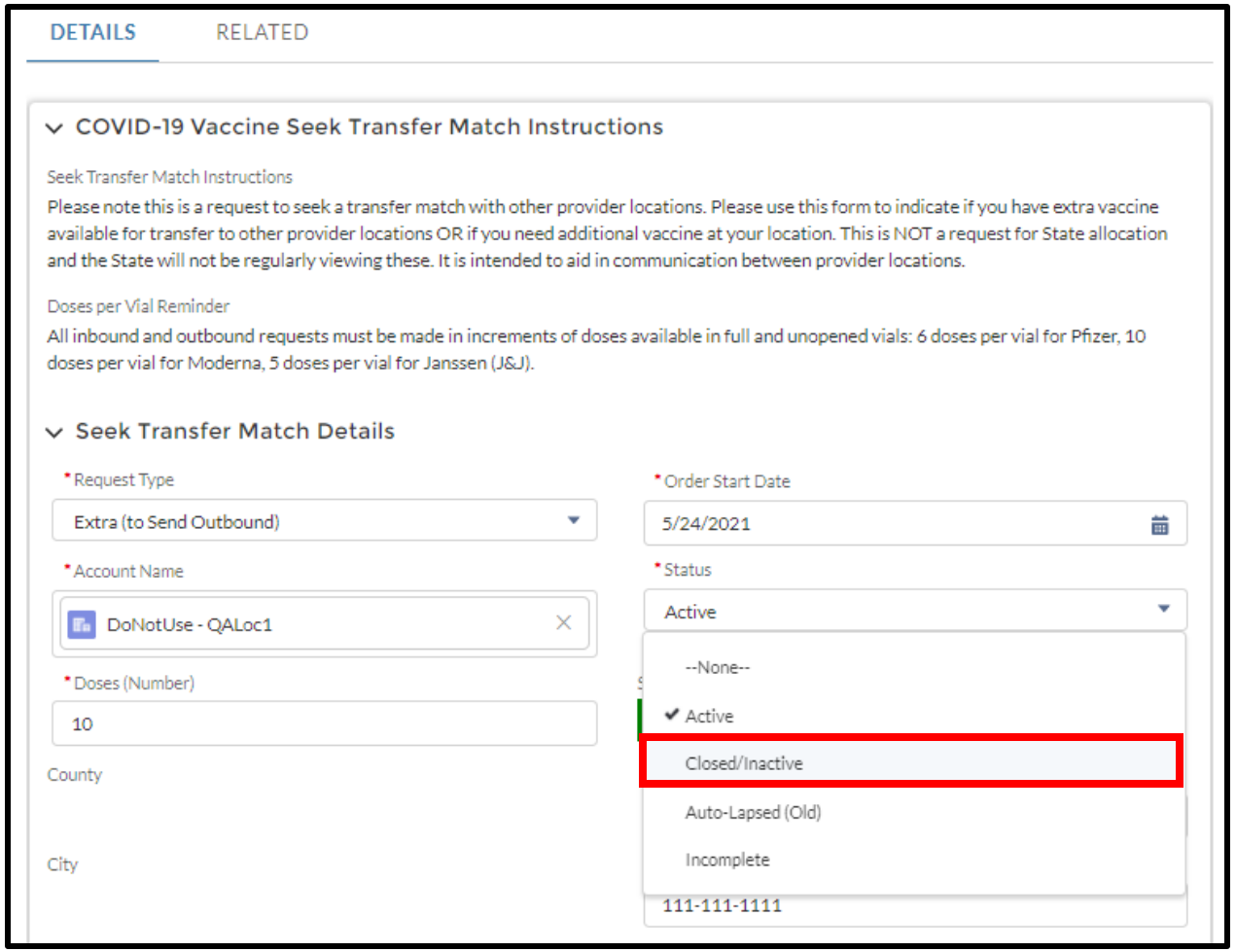
**Healthcare Location Manager**

## Tips

Your form will automatically change to an auto-lapsed status after 21 days. To extend, see the section named "Maintain Your Requests Posted in the Vaccine Marketplace". The auto-lapse email will go to the email address associated to your NCID, not the email you enter in the form.

HEALTH AND HUMAN SERVICES

# Step 14 of 16: Close Your Listing




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

   Orders
   My Seek Transfer Matches

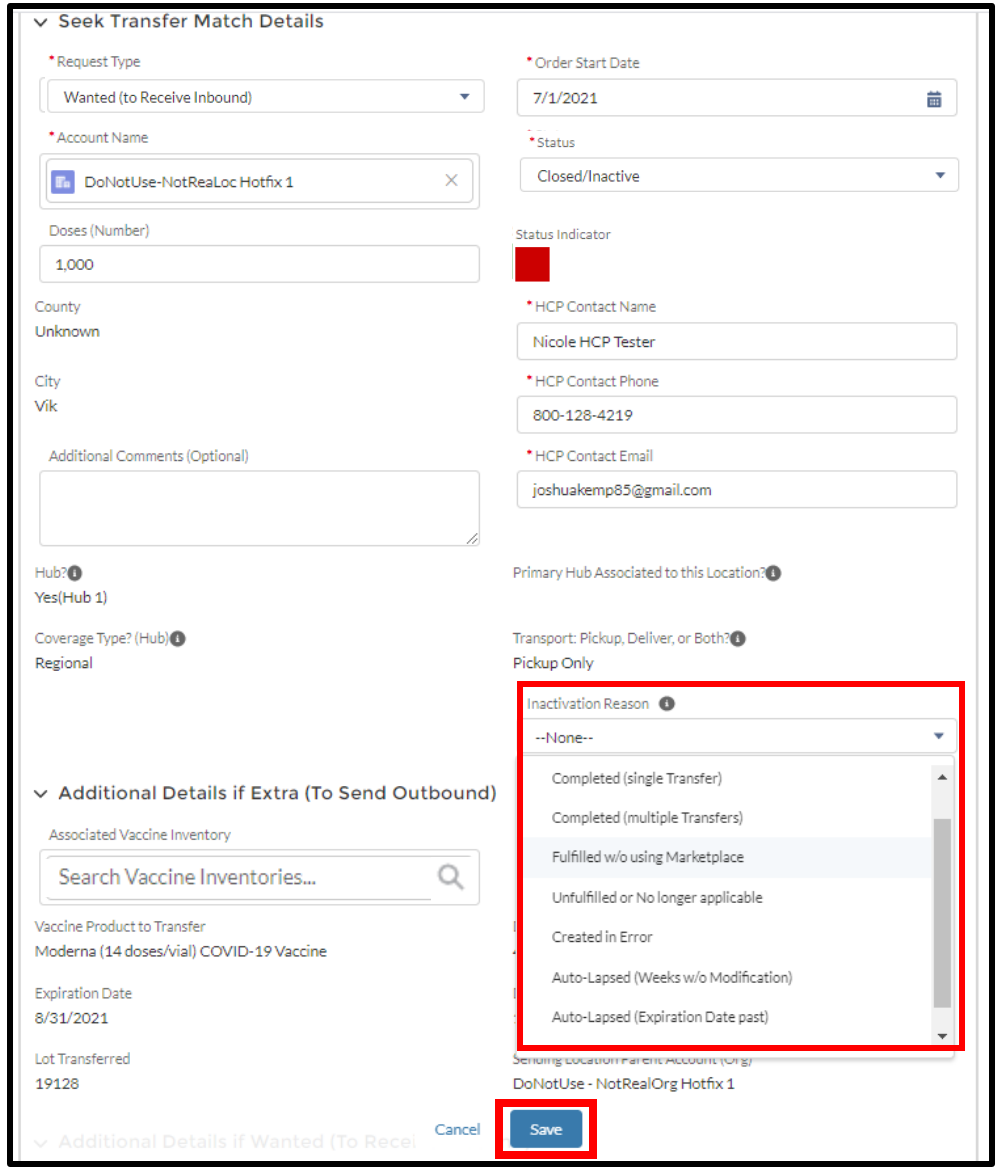
3. Open the form
4. Click on **EDIT** at the top right
5. Change the Status to **CLOSED/INACTIVE**

**Audience**

**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Step 15 of 16: Set Inactivation Reason




When the seek transfer match is closed, identify the reason. Navigate to the **Vaccine Marketplace** tab

1. Navigate to the **INACTIVATION REASON**
2. Open the pick list
3. Select the appropriate reason
4. Click **SAVE**

## Audience

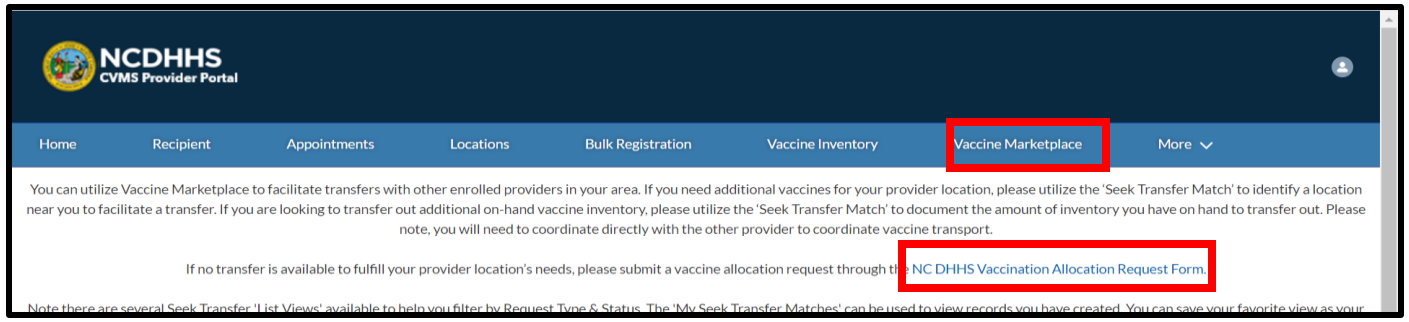
**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

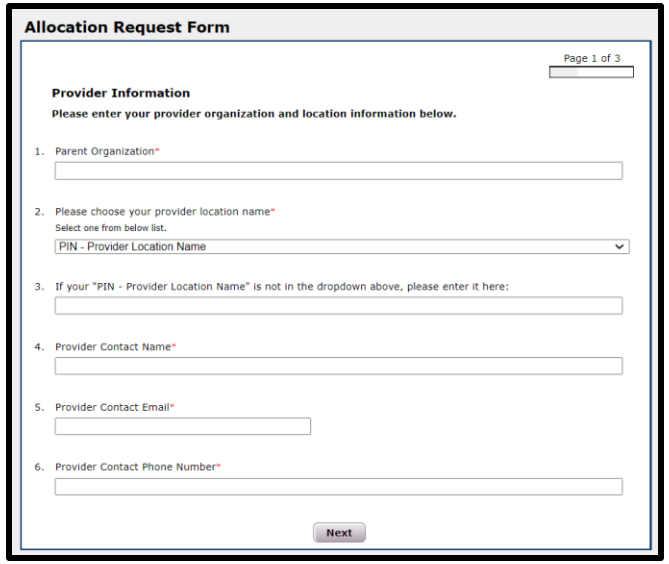
# Step 16 of 16: Request a New Shipment to the NCDHHS Team

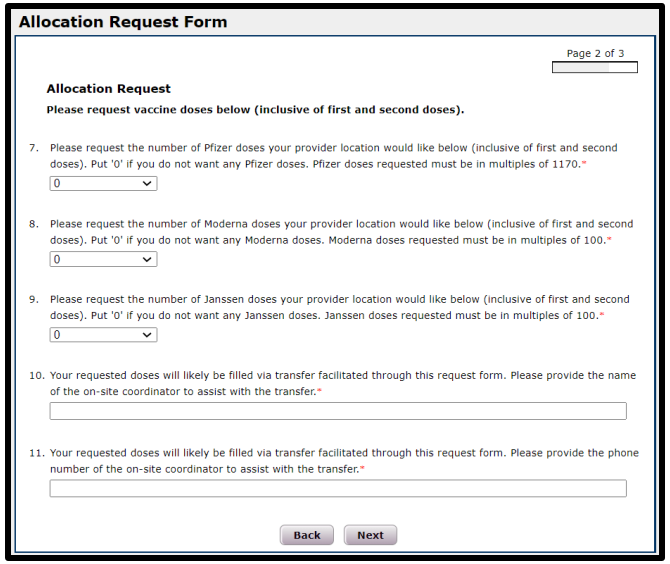
If there is no inventory available nearby, you can submit a request to the State via the NCDHHS Vaccine Allocation Form: https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyID=98MI76m3#. A link to the form was added to the **VACCINE MARKETPLACE** tab.

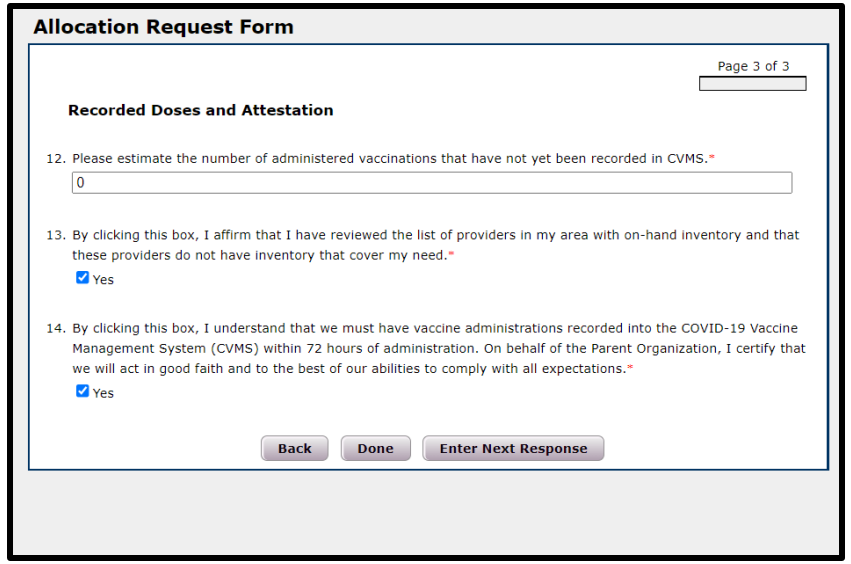
1. Navigate to **VACCINE MARKETPLACE**
2. Click the **NC DHHS VACCINATION ALLOCATION REQUEST FORM** link




3. Fill out the form and submit it



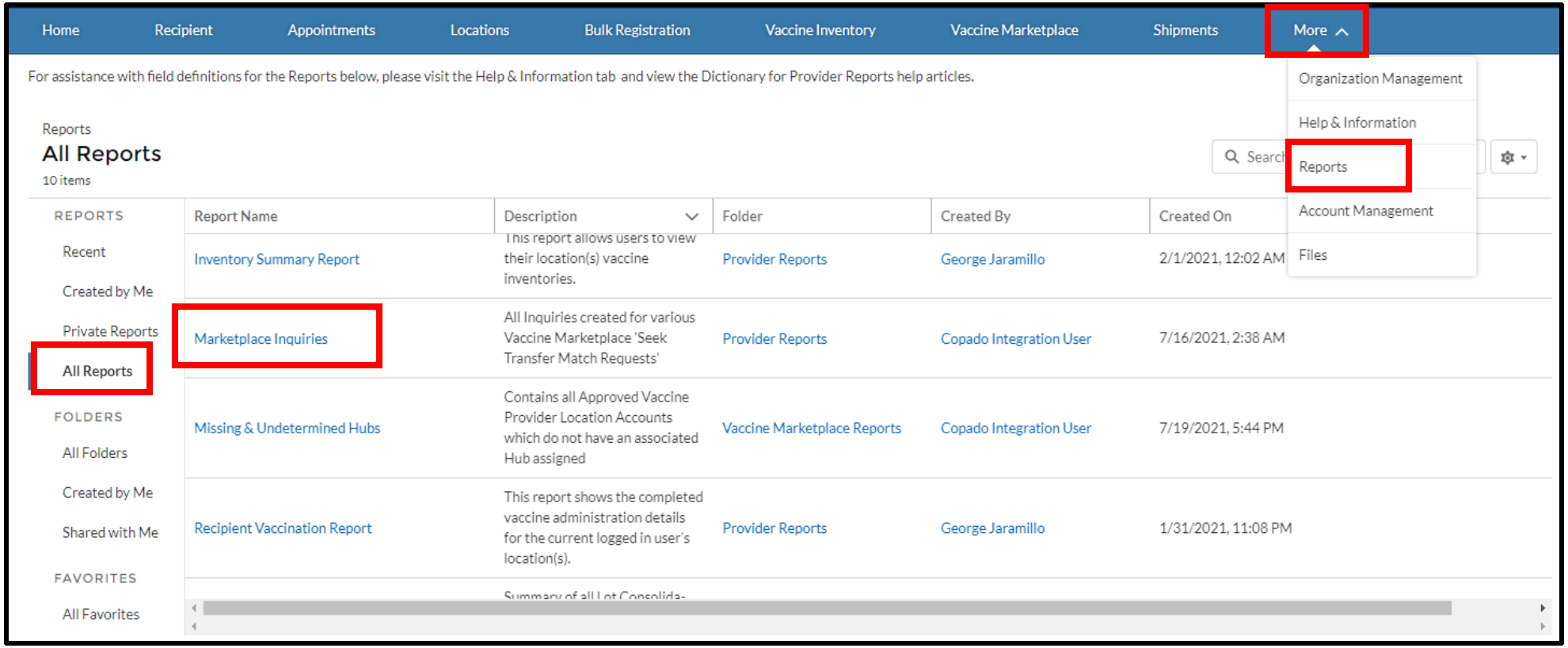




NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Accessing the Marketplace Inquiries Report

The Marketplace Inquiries Report displays all inquiries for listings you posted in the Vaccine Marketplace.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **MARKETPLACE INQUIRIES REPORT**




## Audience

**Healthcare Location Manager**

## Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal.

# Accessing the Marketplace Inquiries Report (Continued)

Home | Recipient | Appointments | Locations | Bulk Registration | Vaccine Inventory | Vaccine Marketplace | Shipments | More

Report: Marketplace Inquiries

**Marketplace Inquiries**

All Inquiries created for various Vaccine Marketplace 'Seek Transfer Match Requests'

Add Chart | Export

| Total Records | Total Doses Requested | Total Transfer Warning? |
|---|---|---|
| 20 | 3,063 | 0 |

| Requested from Account | Requesting Account | Order (Marketplace Request) | Marketplace Inquiry: Marketplace Inquiry Name | Status | Doses Requested | Vaccine Product | Trans |
|---|---|---|---|---|---|---|---|
| DoNotUseNotARealLocADA (14) | DoNotUseNotARealLocADA (14) | ORD-0017463 (1) | MKTINQ-0001 | Open | 300 | | Sendi |
| | | Subtotal | | | 300 | | |
| | | ORD-0017465 (1) | MKTINQ-0002 | Open | 300 | TestVaccine2 (Moderna) | Sendi |
| | | Subtotal | | | 300 | | |
| | | ORD-0017468 (1) | MKTINQ-0008 | Open | 300 | | Sendi |
| | | Subtotal | | | 300 | | |
| | | ORD-0017489 (1) | MKTINQ-0000 | Open | 300 | | Sendi |
| | | Subtotal | | | 300 | | |
| | | ORD-0017553 (1) | MKTINQ-0007 | Open | 250 | | Sendi |
| | | Subtotal | | | 250 | | |
| | | ORD-0017577 (1) | MKTINQ-0009 | Open | 23 | | Sendi |
| | | Subtotal | | | 23 | | |
| | | ORD-0017579 (4) | | | | | |

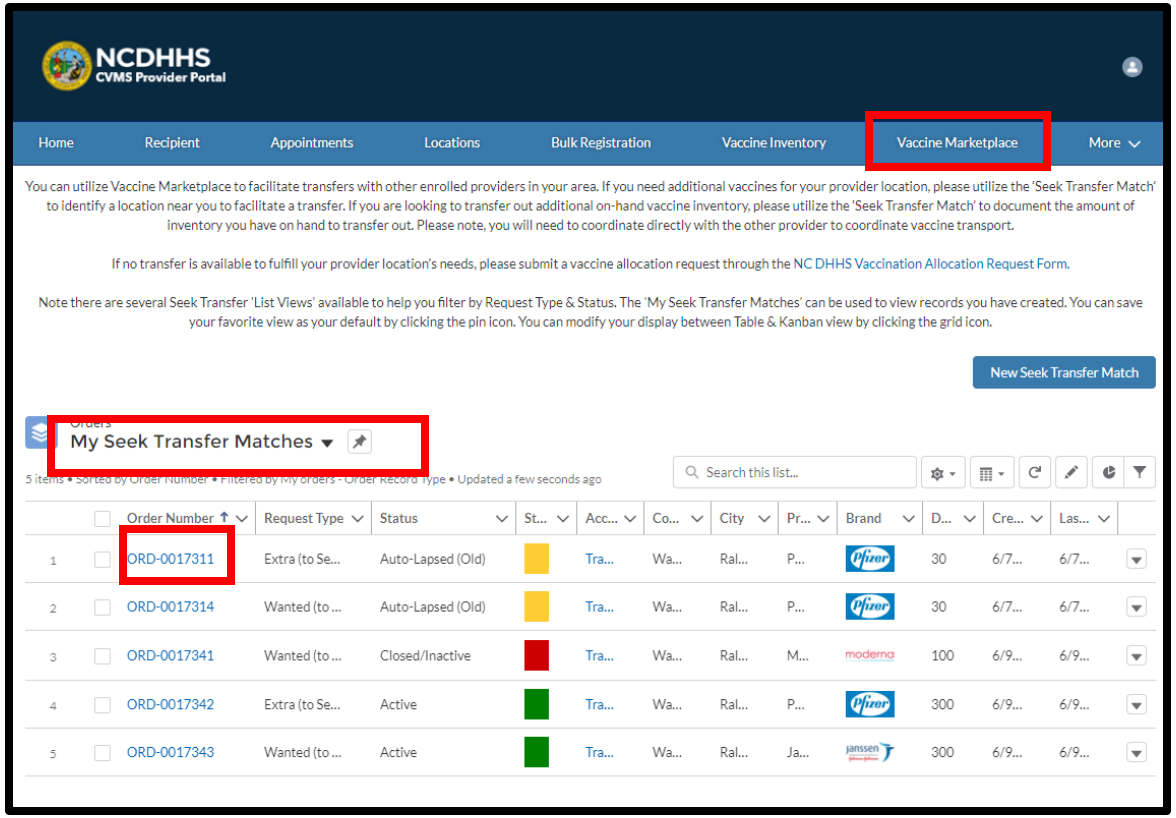
Row Counts | Detail Rows | Subtotals | Grand Total

## Audience

**Healthcare Location Manager**

# Maintain Your Requests Posted in the Vaccine Marketplace

# Step 1 of 3: Renew Your Extra or Wanted Listings




Your post in the Vaccine Marketplace will expire:

- after 21 days,
- once linked inventory expires,
- if the linked inventories was fully consumed (available dose = 0).

You can renew your post within 21 days from original posting, or after 21 days of original posting 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

## Audience

**Healthcare Location Manager**

## 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 Listing

NCDHHS
CVMS Provider Portal

Home | Recipient | Appointments | Locations | Bulk Registration | More

Order
ORD-0017342

Edit | Clone

| Account Name | Status | Manufacturer | Doses (Number) | Order Start Date |
|---|---|---|---|---|
| Training Team Vaccine Provider - Site 1 | Active | | 300 | 6/9/2021 |

DETAILS | RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: https://covid19.ncdhhs.gov/media/2318/download?attachment
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

| Request Type | Order Start Date |
|---|---|
| Extra (to Send Outbound) | 6/9/2021 |
| **Account Name** | **Status** |
| Training Team Vaccine Provider - Site 1 | Active |
| Doses (Number) | Status Indicator |

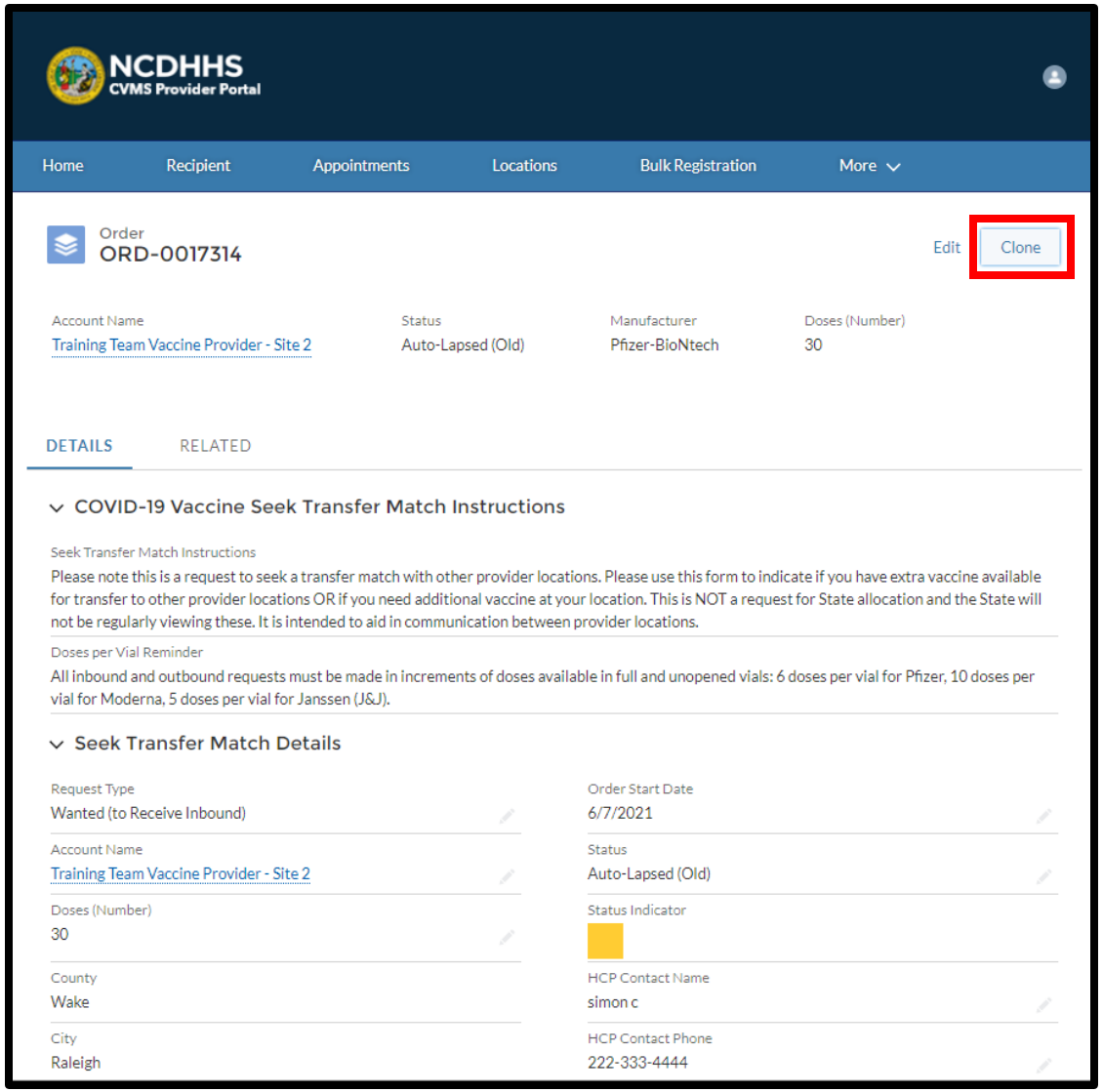
If you request is still active and you wish to extend the deadline before the request automatically expires, update the request date.

1. Click on **EDIT**
2. Update the **ORDER START DATE** to Today's date to reinitiate the 21-day countdown
3. Click **SAVE**

**Audience**

**Healthcare Location Manager**

# Step 3 of 3: Clone Your Listing




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 21-day countdown
3. Update the Status to **ACTIVE**
4. Update any other fields if necessary
5. Click **SAVE**

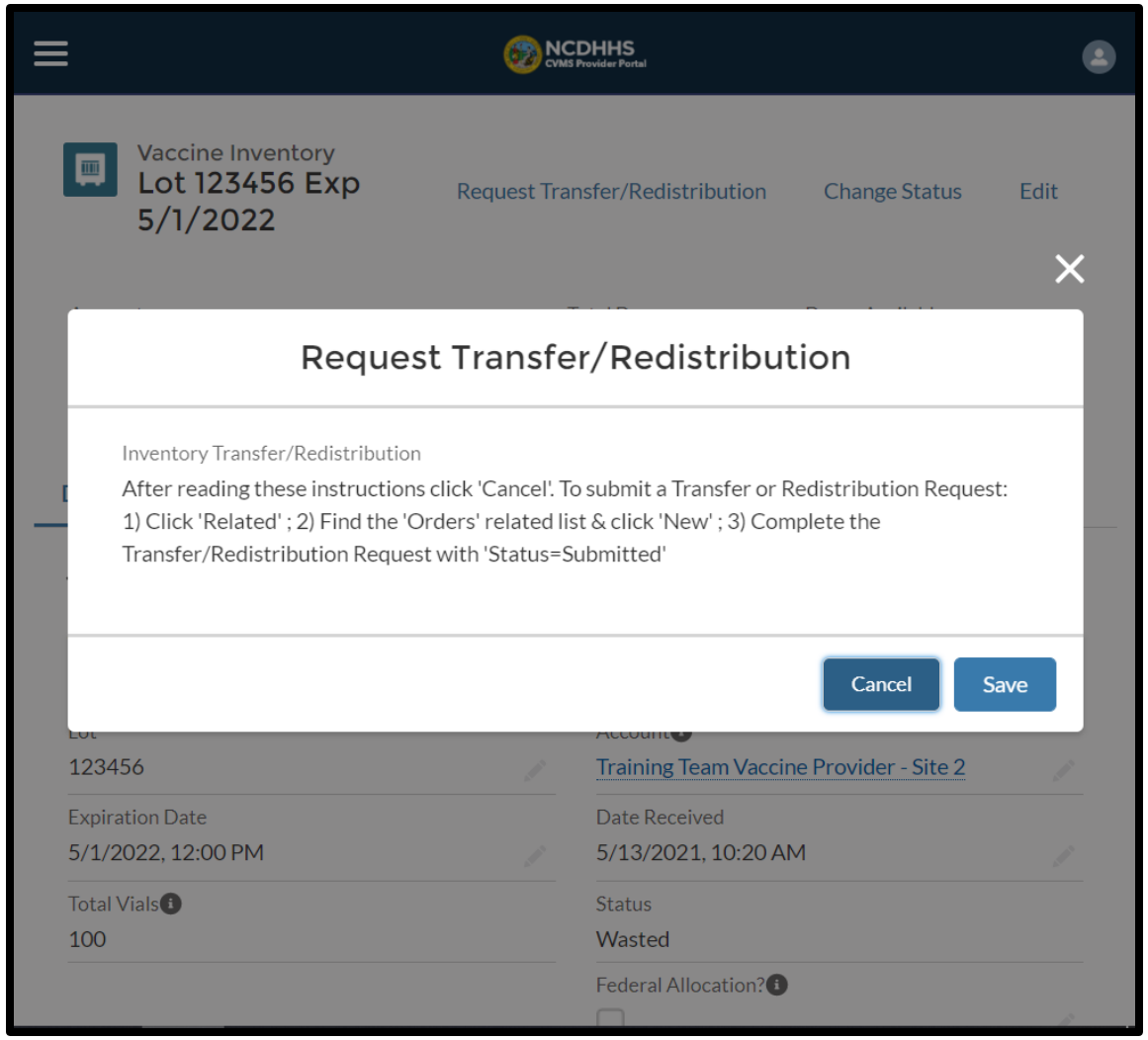
**Audience**

**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Transferring 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**

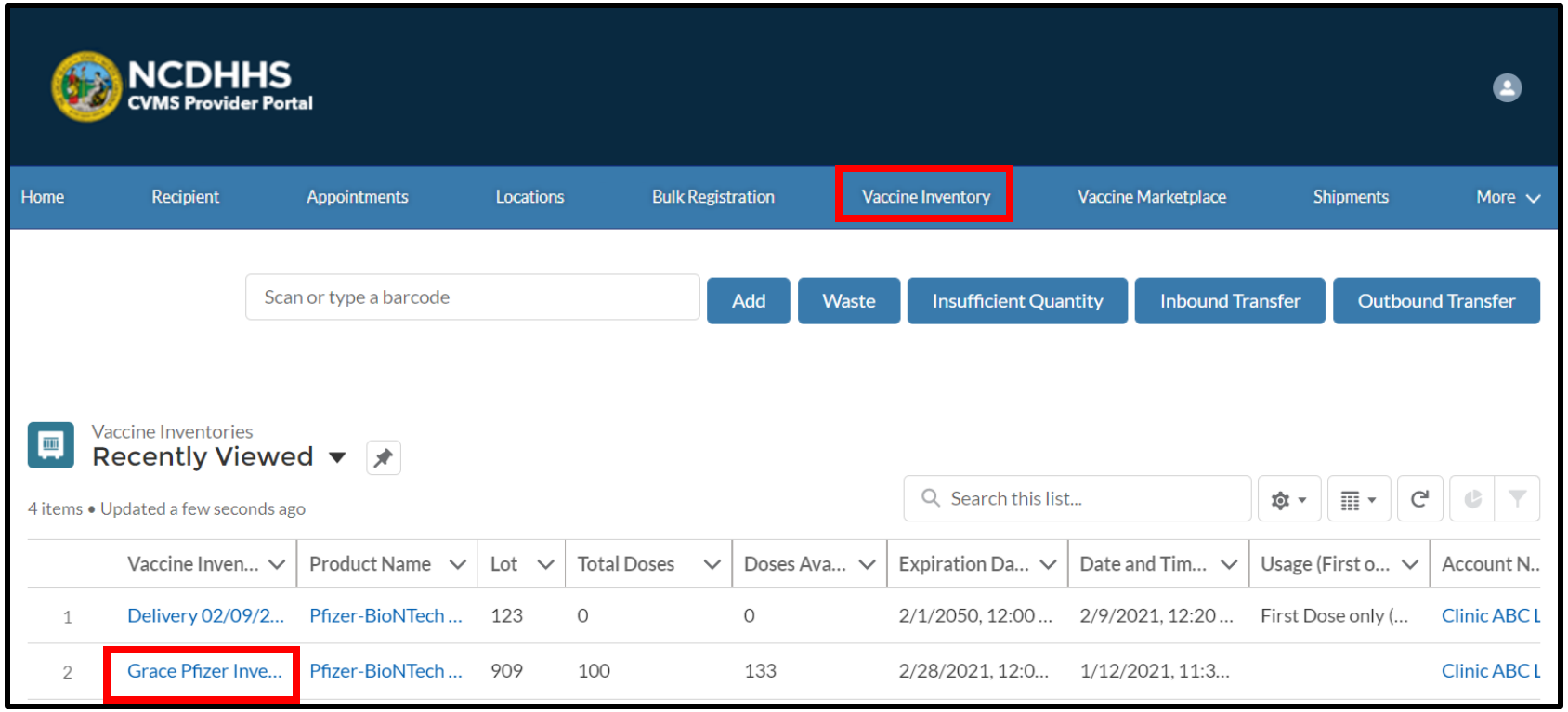
**Healthcare Location Manager**

# 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



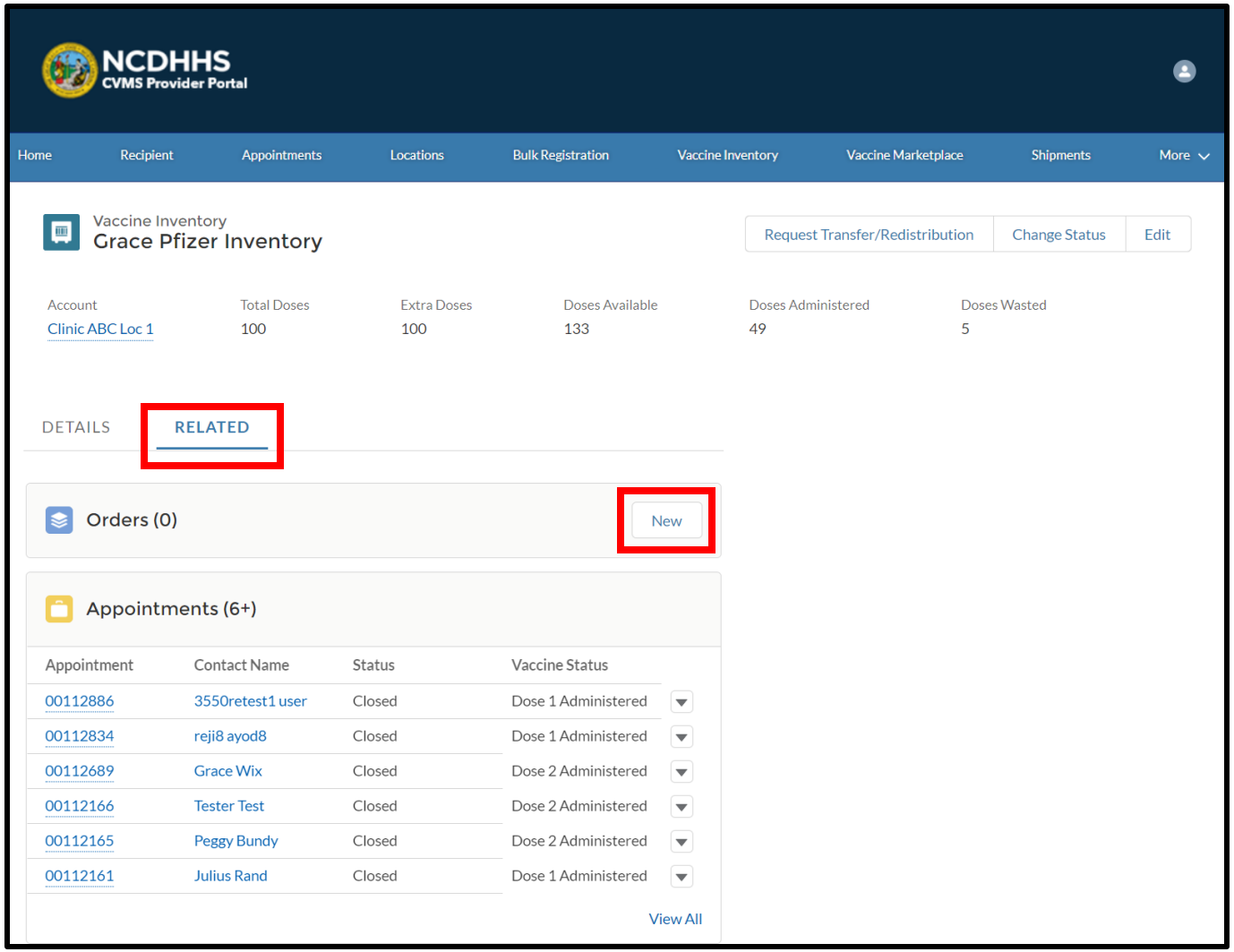

## Audience

**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**

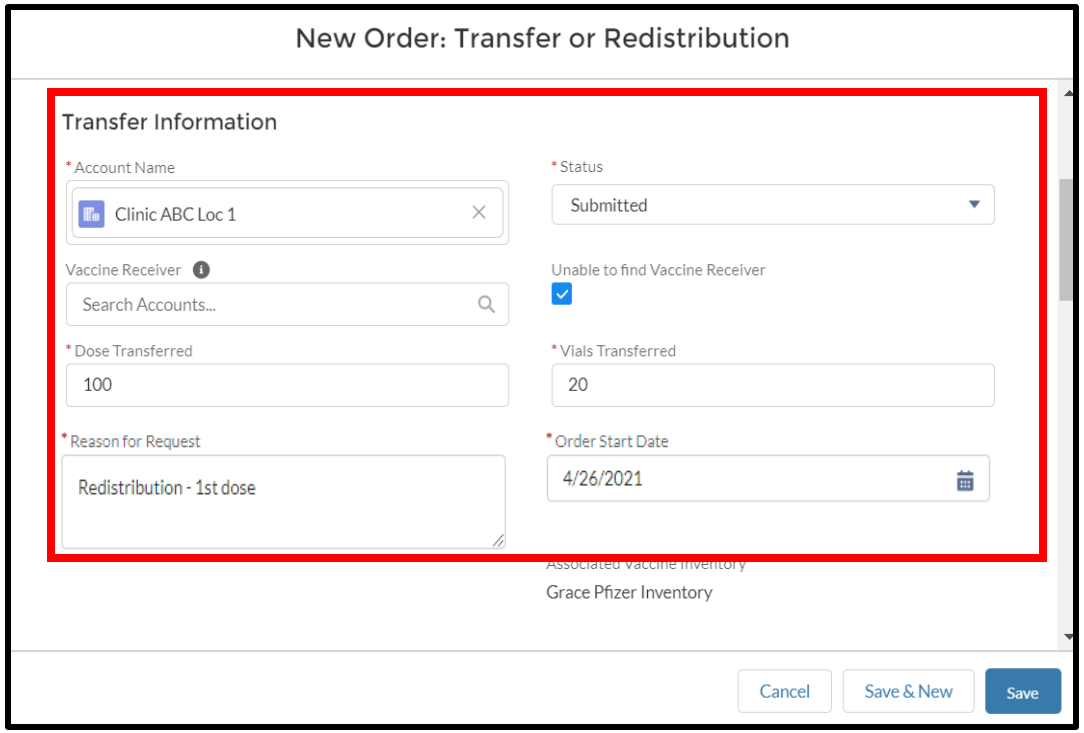
## Audience

**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**

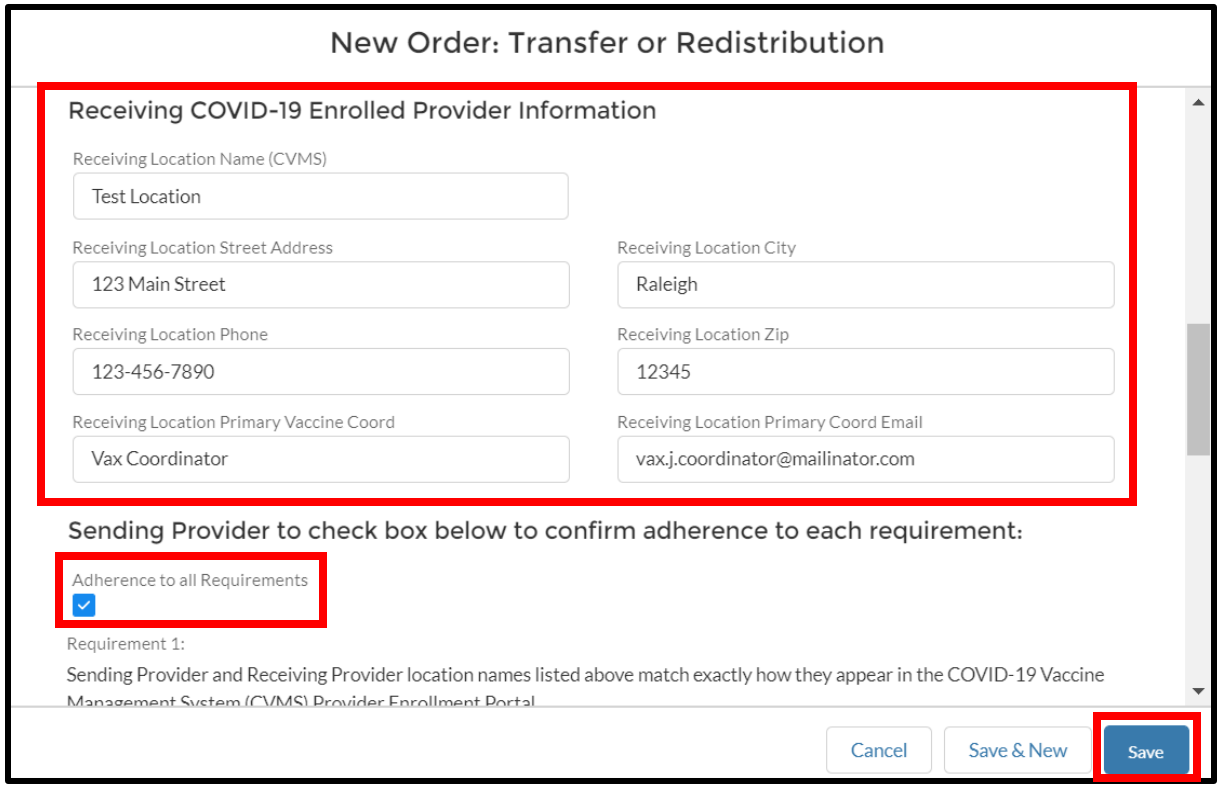
## Tips

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

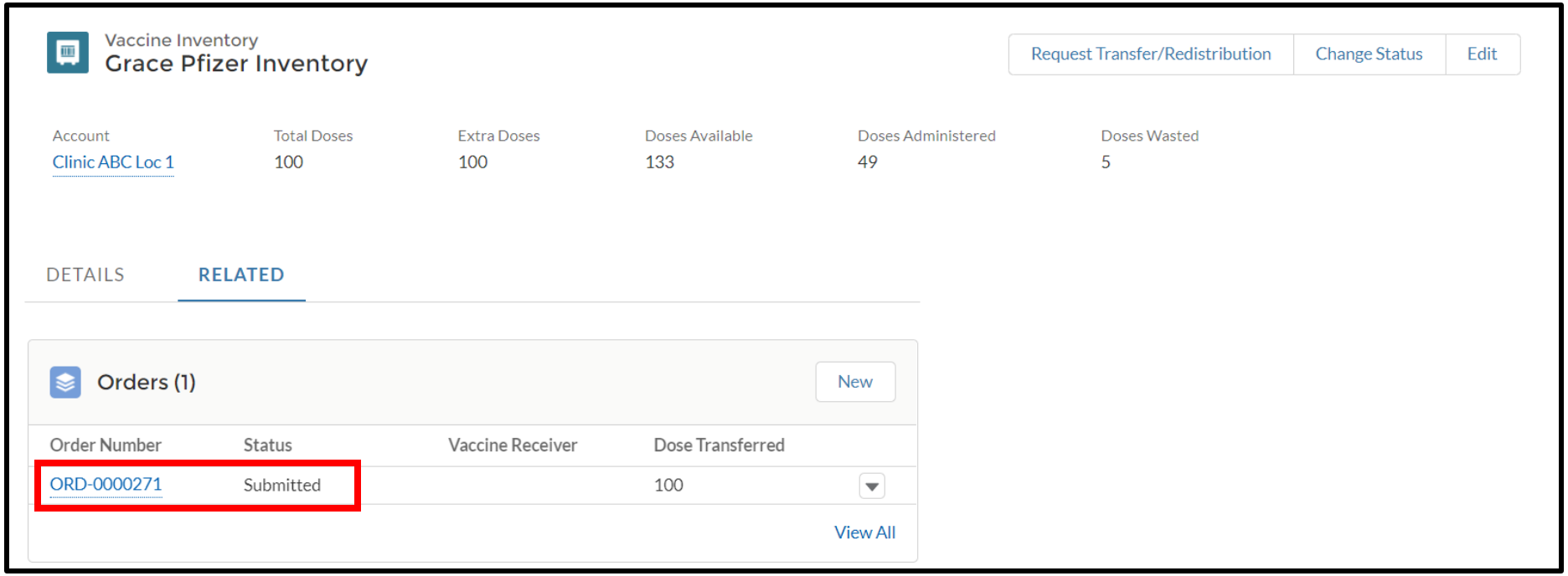
**Healthcare Location Manager**

## 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 **TRANSFER 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

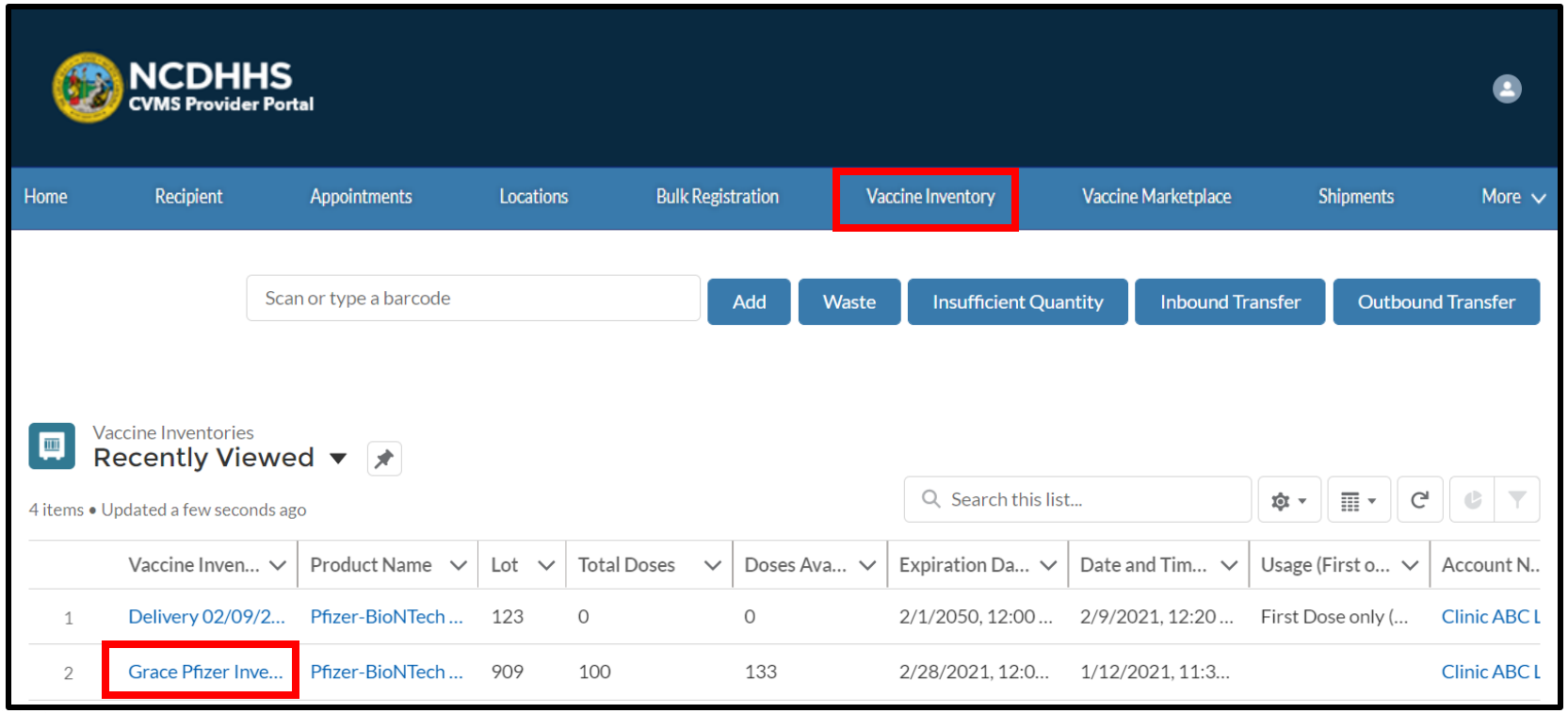
## Audience

**Healthcare Location Manager**

# Step 7 of 10: Provide Redistribution/Transfer Details

You can **UPDATE** the Order Transfer Record with the **ACTUAL TRANSFER 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

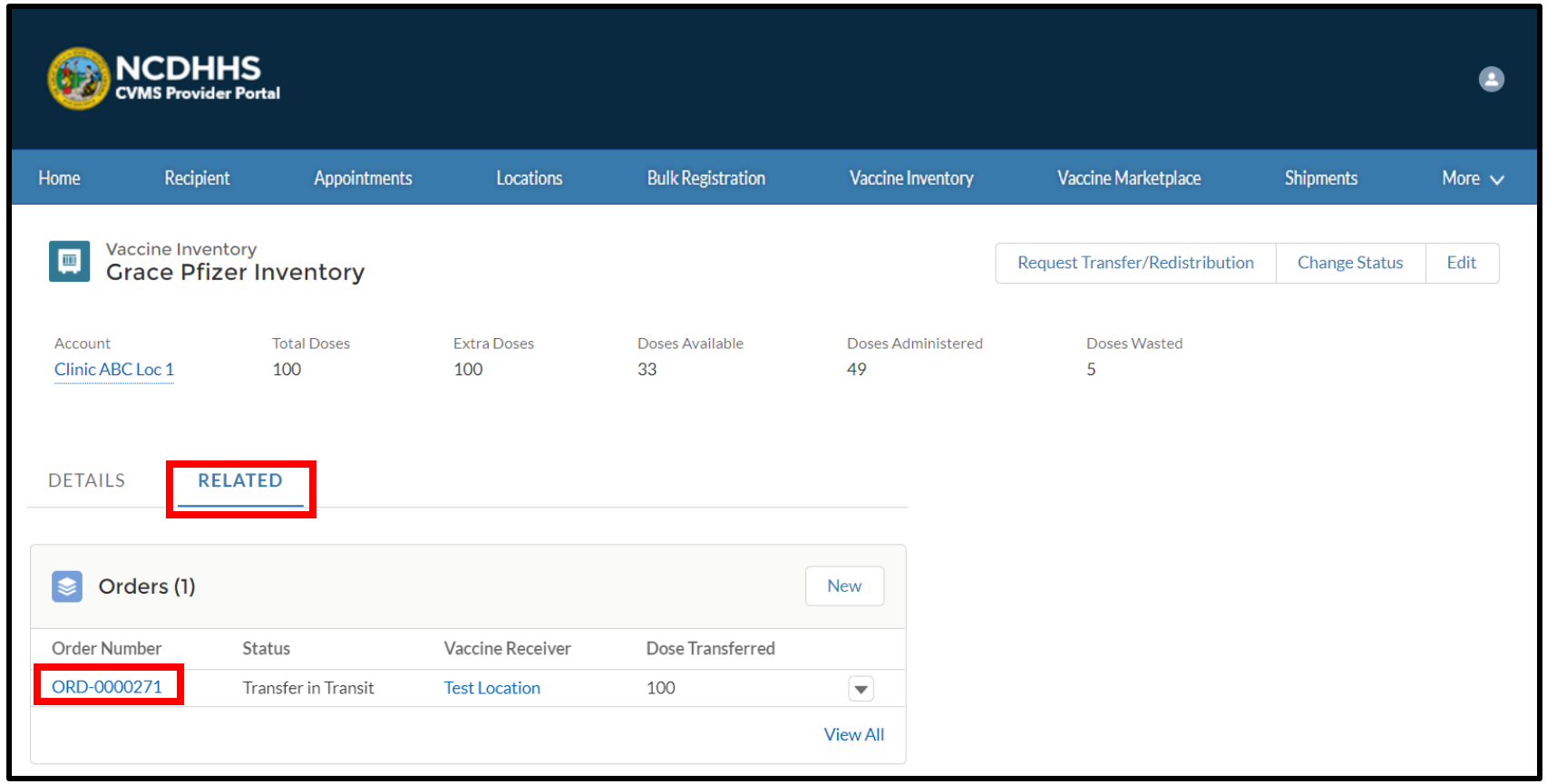



## Audience

**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



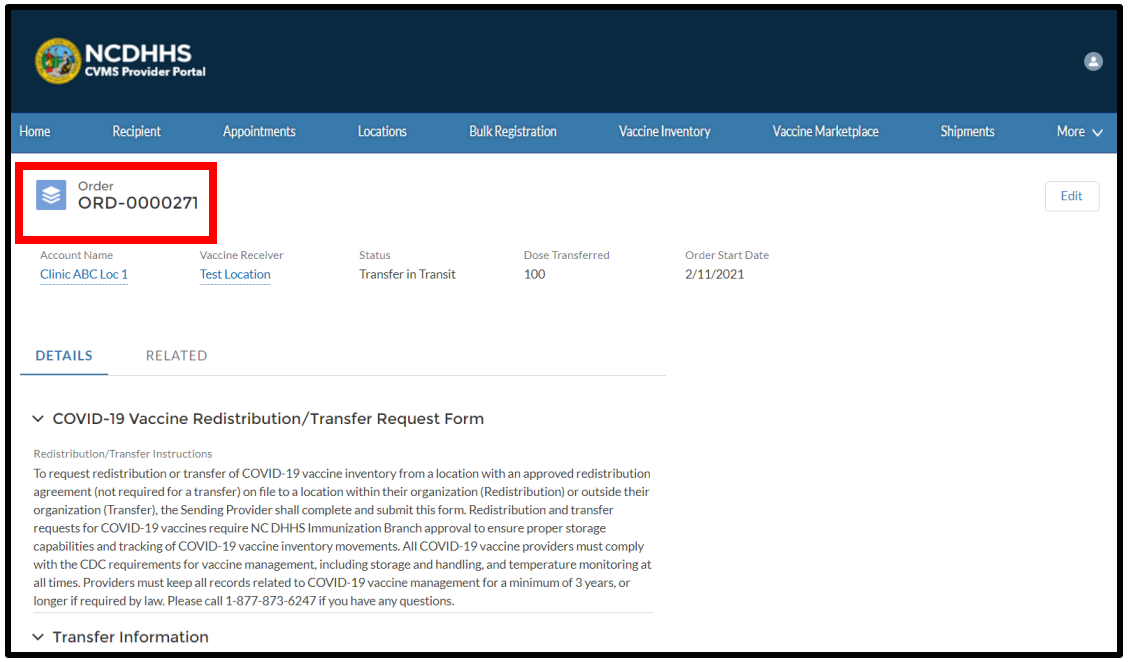

## Audience

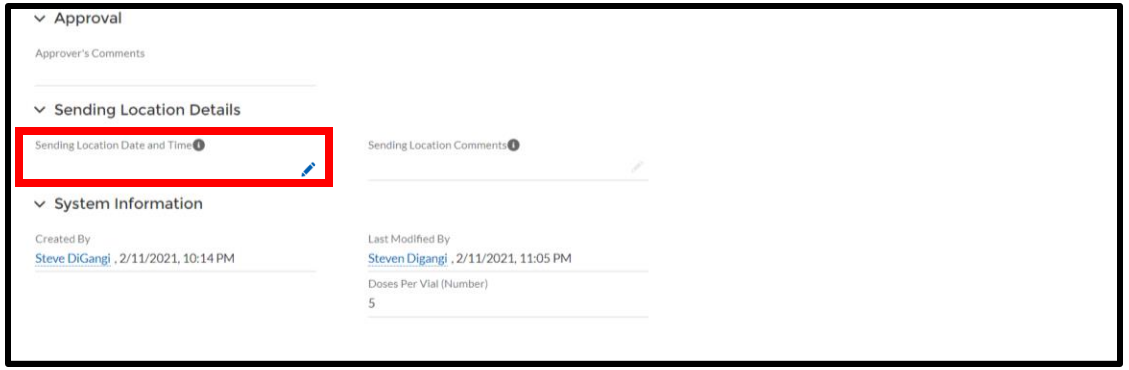
**Healthcare Location Manager**

## 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 **TRANSFER DETAILS REQUIRED**.

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

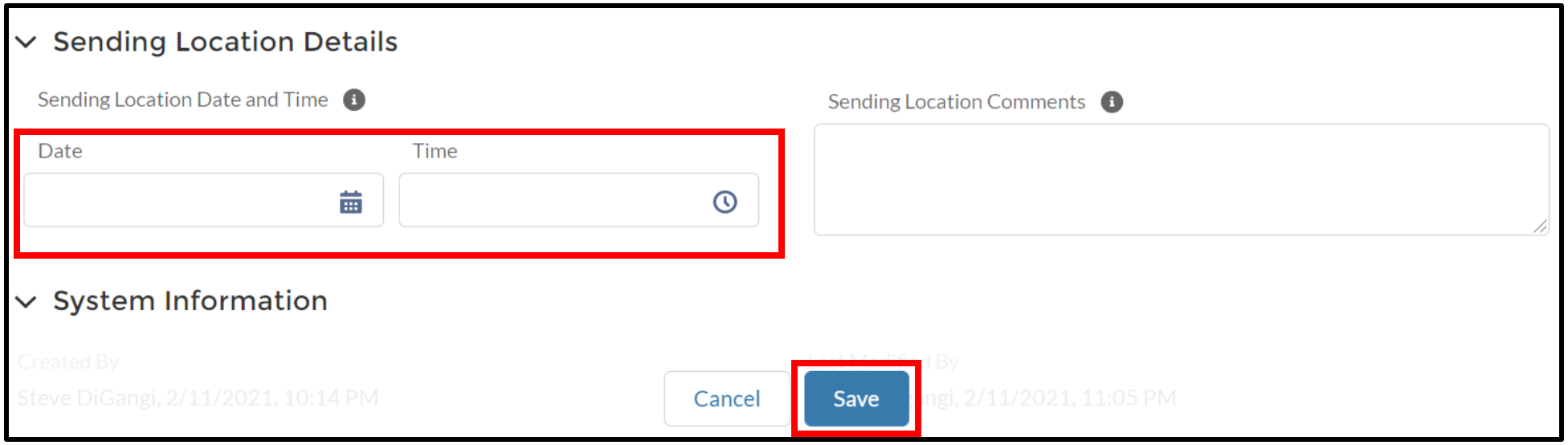
## Audience

**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 the vaccines were sent
2. Enter the **TRANSFER TRACKING INFORMATION** in the **SENDING LOCATION COMMENTS** field
3. Click **SAVE**



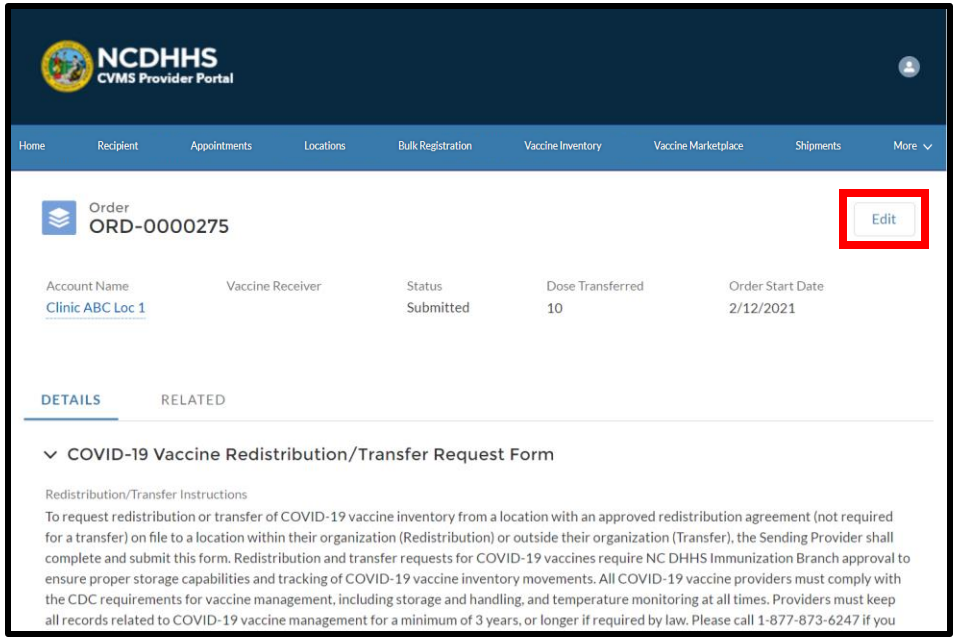

**Audience**

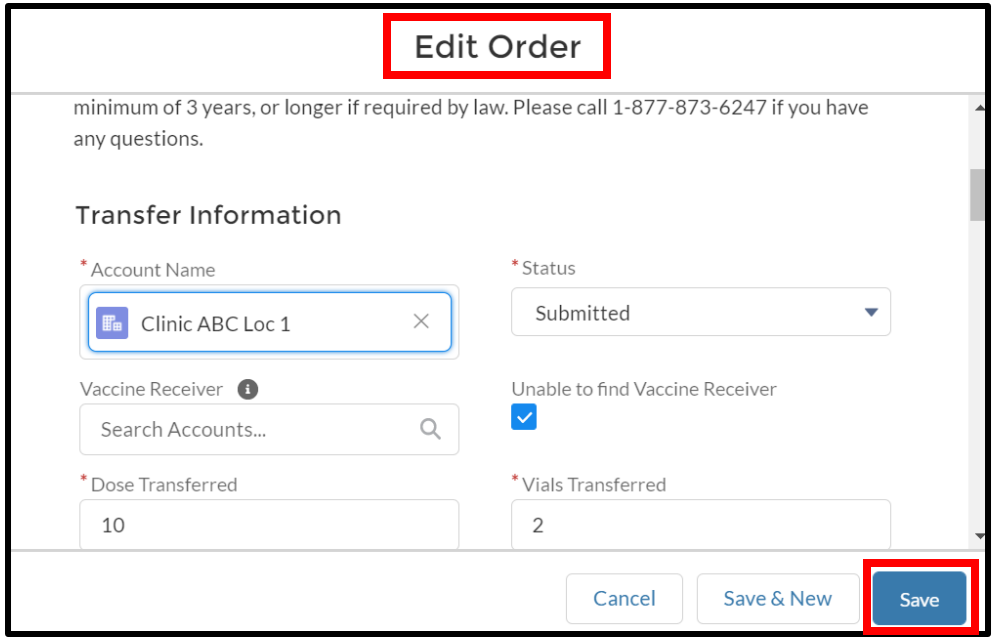
**Healthcare Location Manager**

# 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**

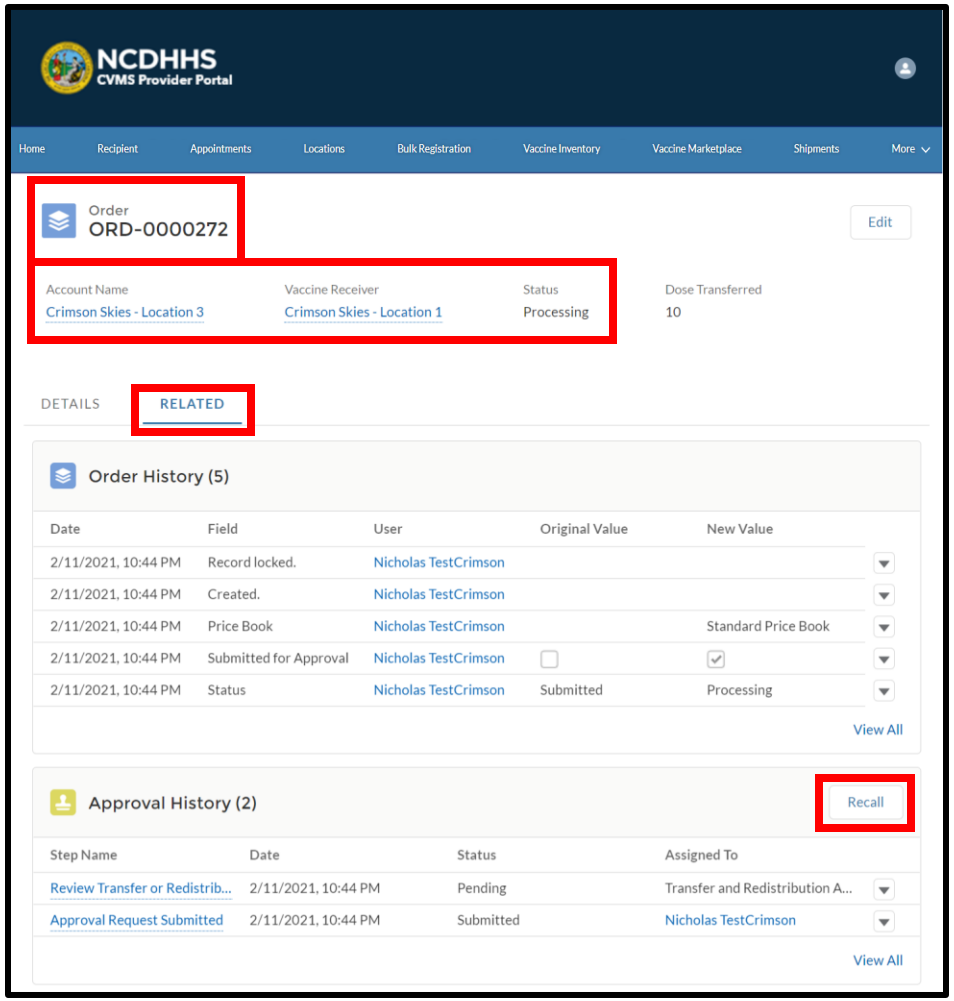



## Audience

**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**

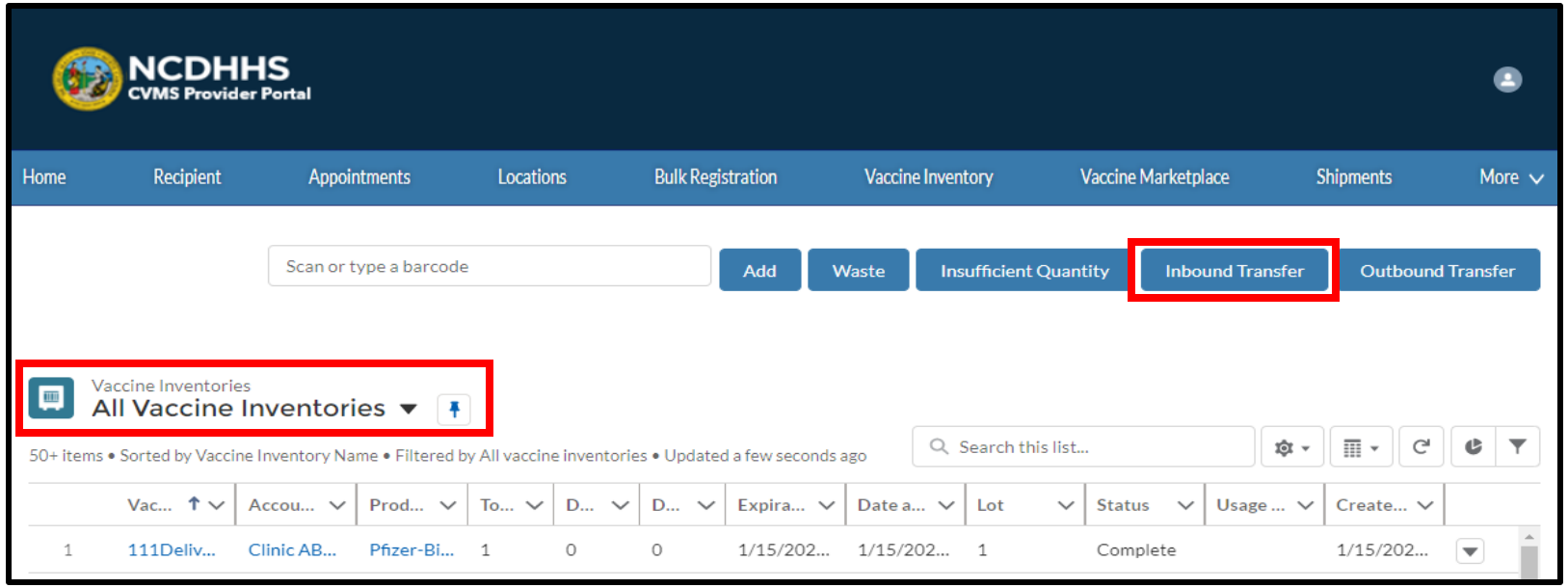
# Receive Inbound Transfer or Redistribution

# 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**

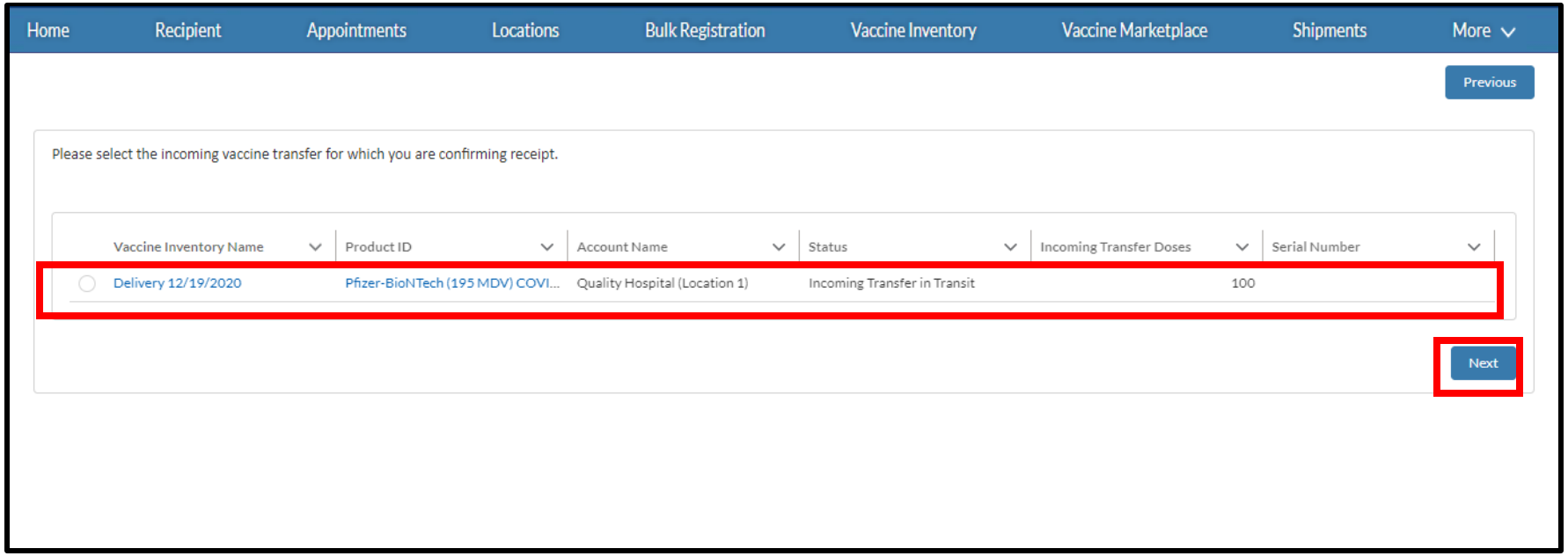
## Tips

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

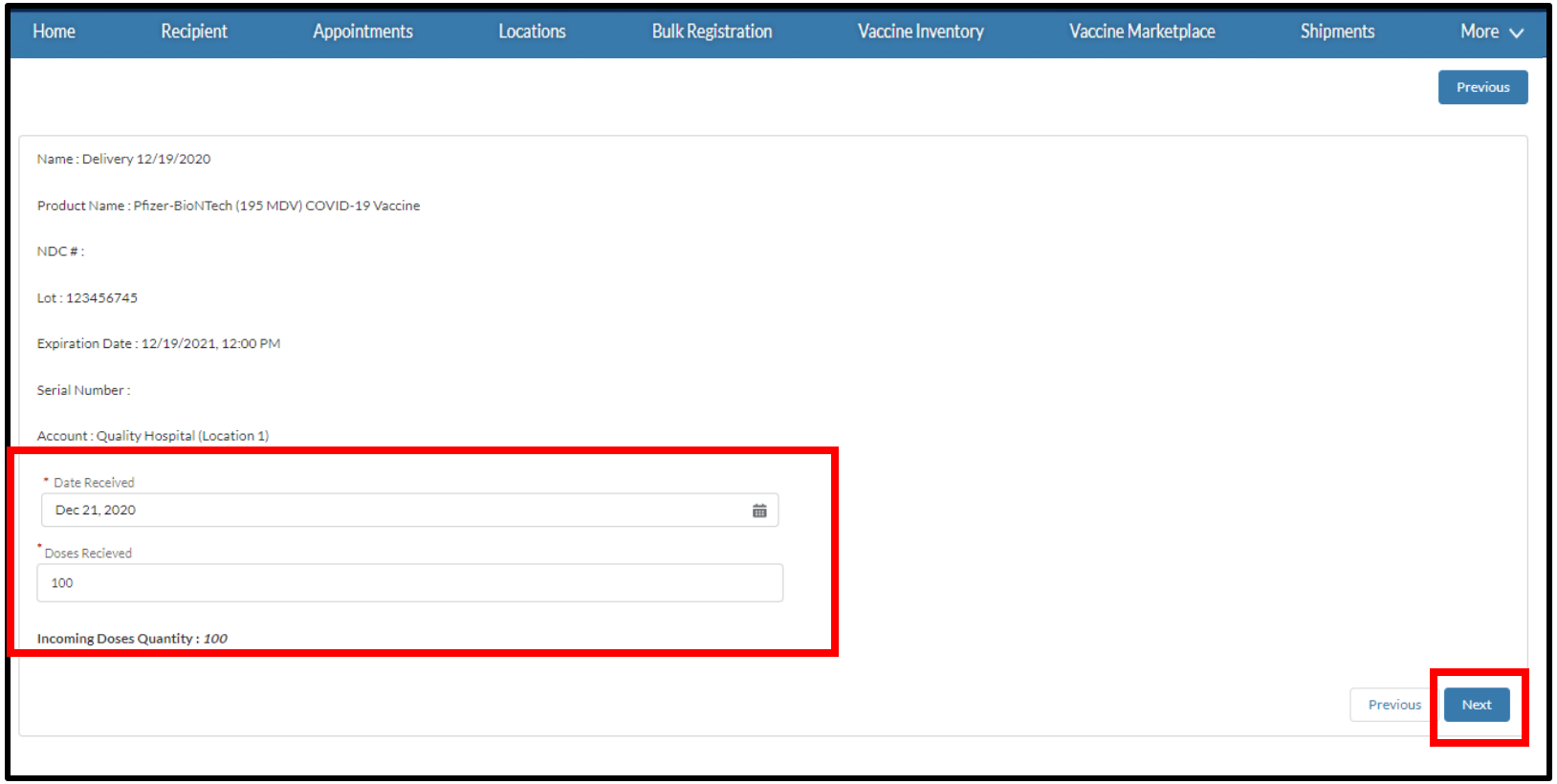
Identify Vaccine Inventory Records for inbound redistribution/transfer.

# 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**

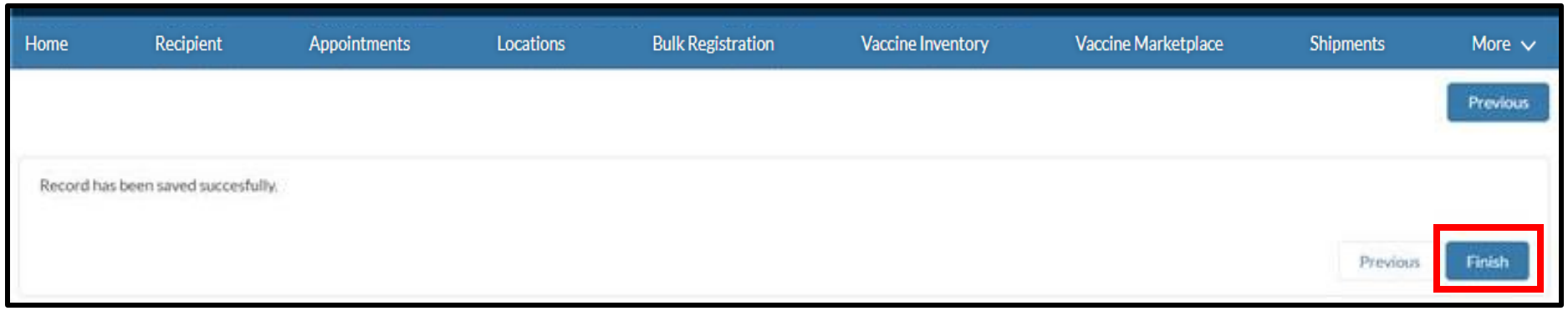
**Healthcare Location Manager**

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**

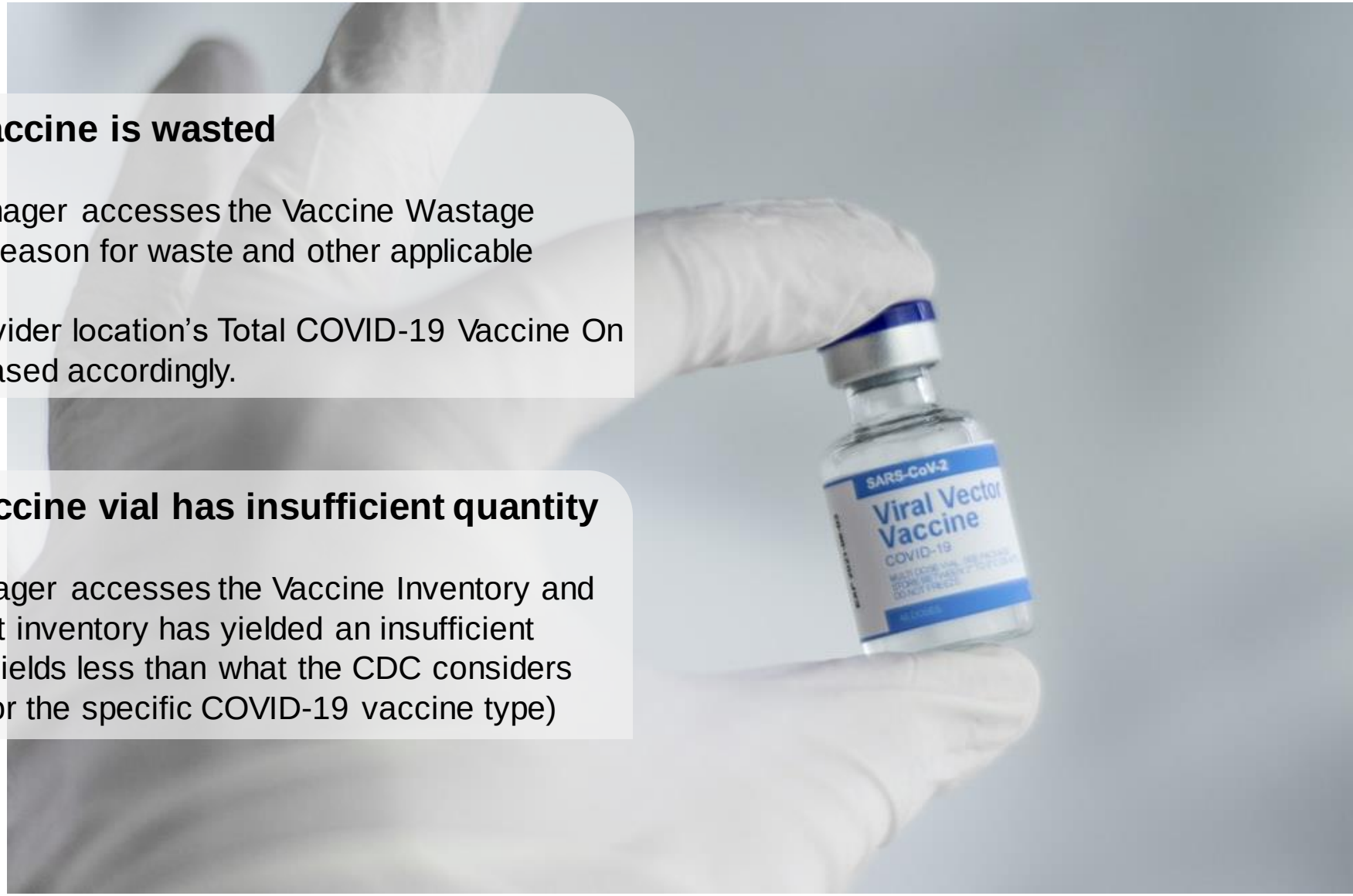
**Healthcare Location Manager**

**Tips**

Complete the inbound transfer form by clicking Finish.

# Declaring Inventory Deprecation Events

# 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)

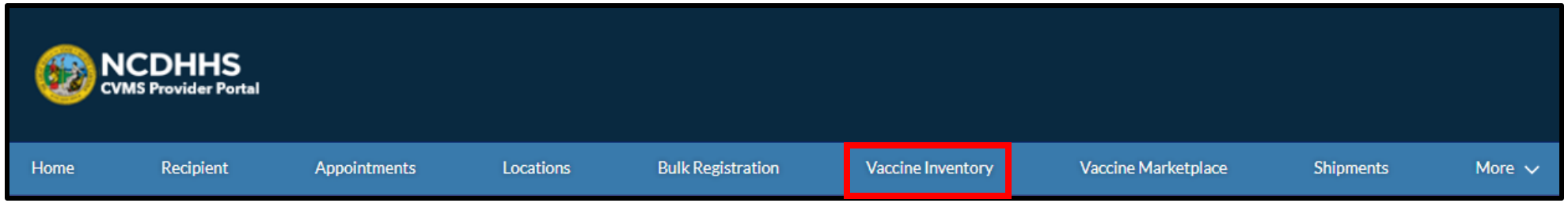
# Log a Vaccine Wastage

# 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**



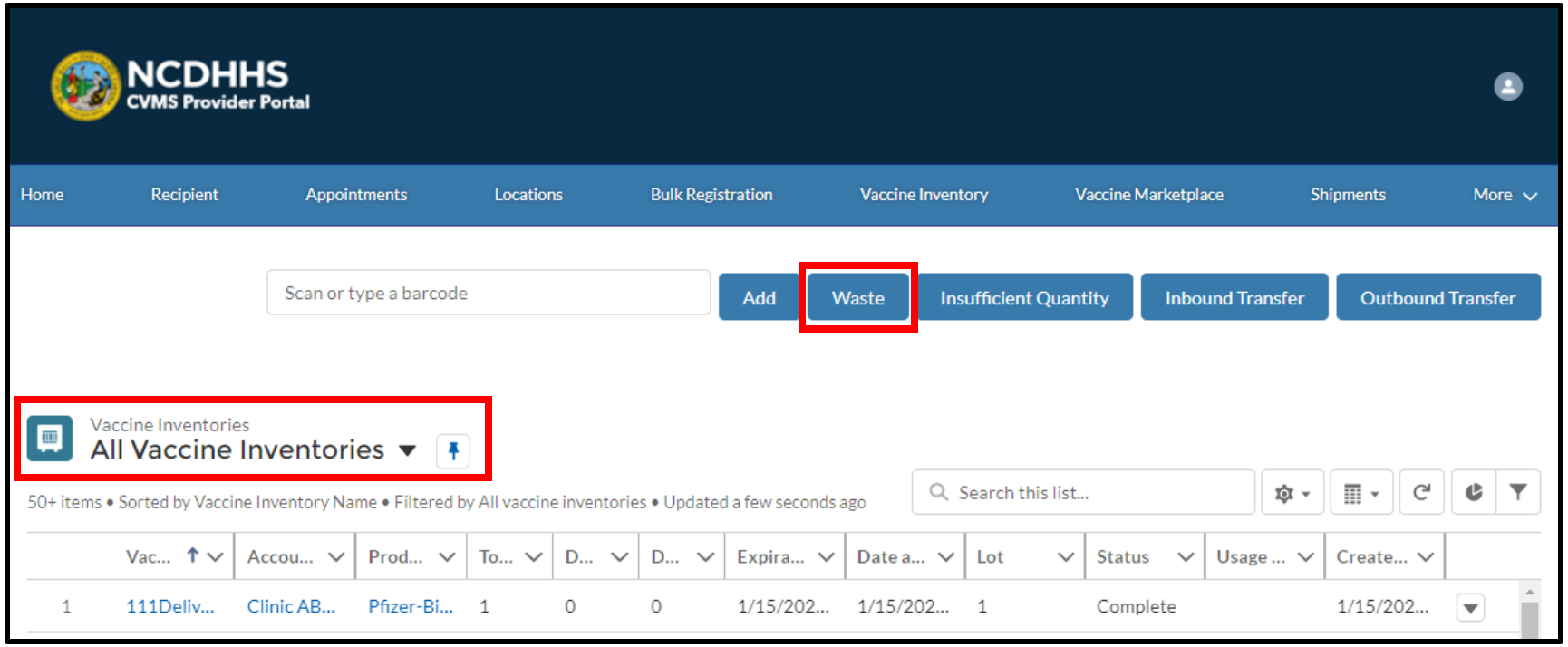

**Audience**

**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**

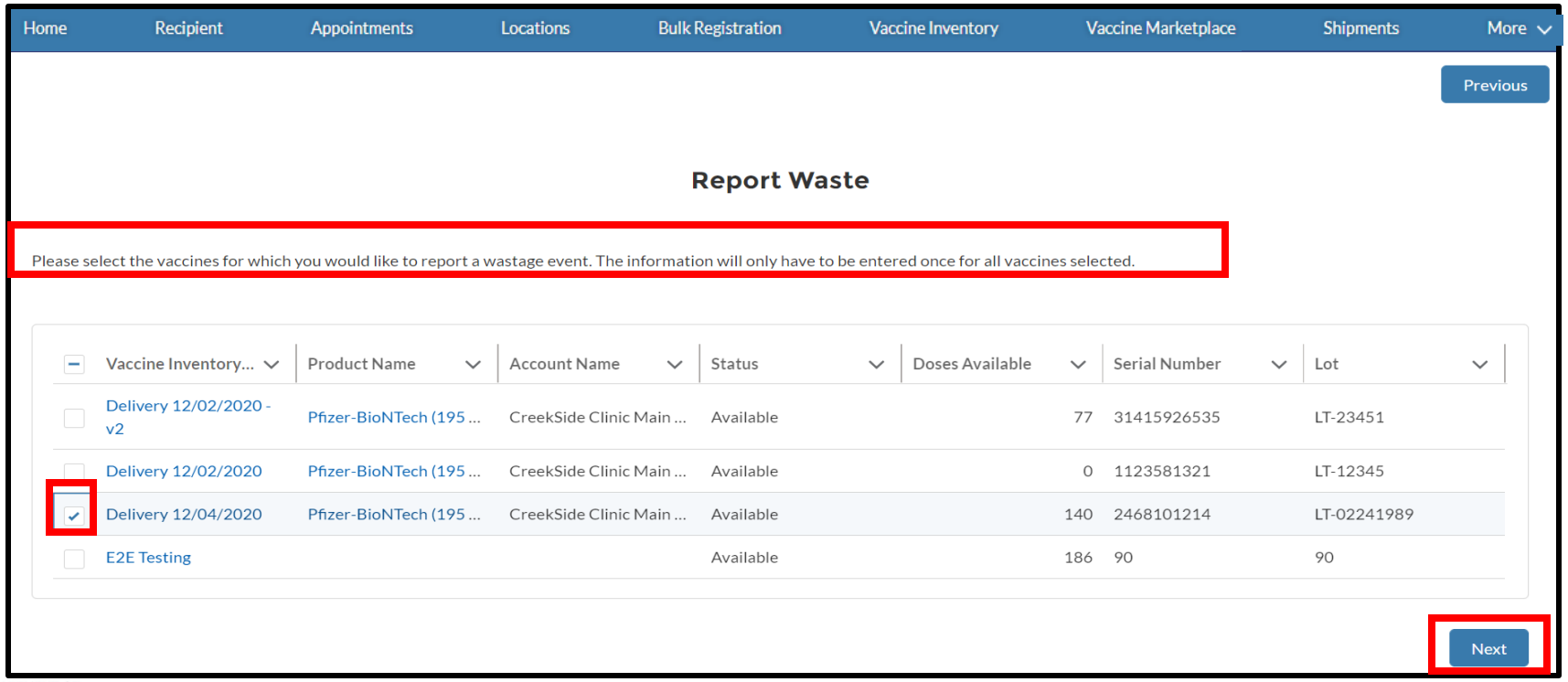
## Tips

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**



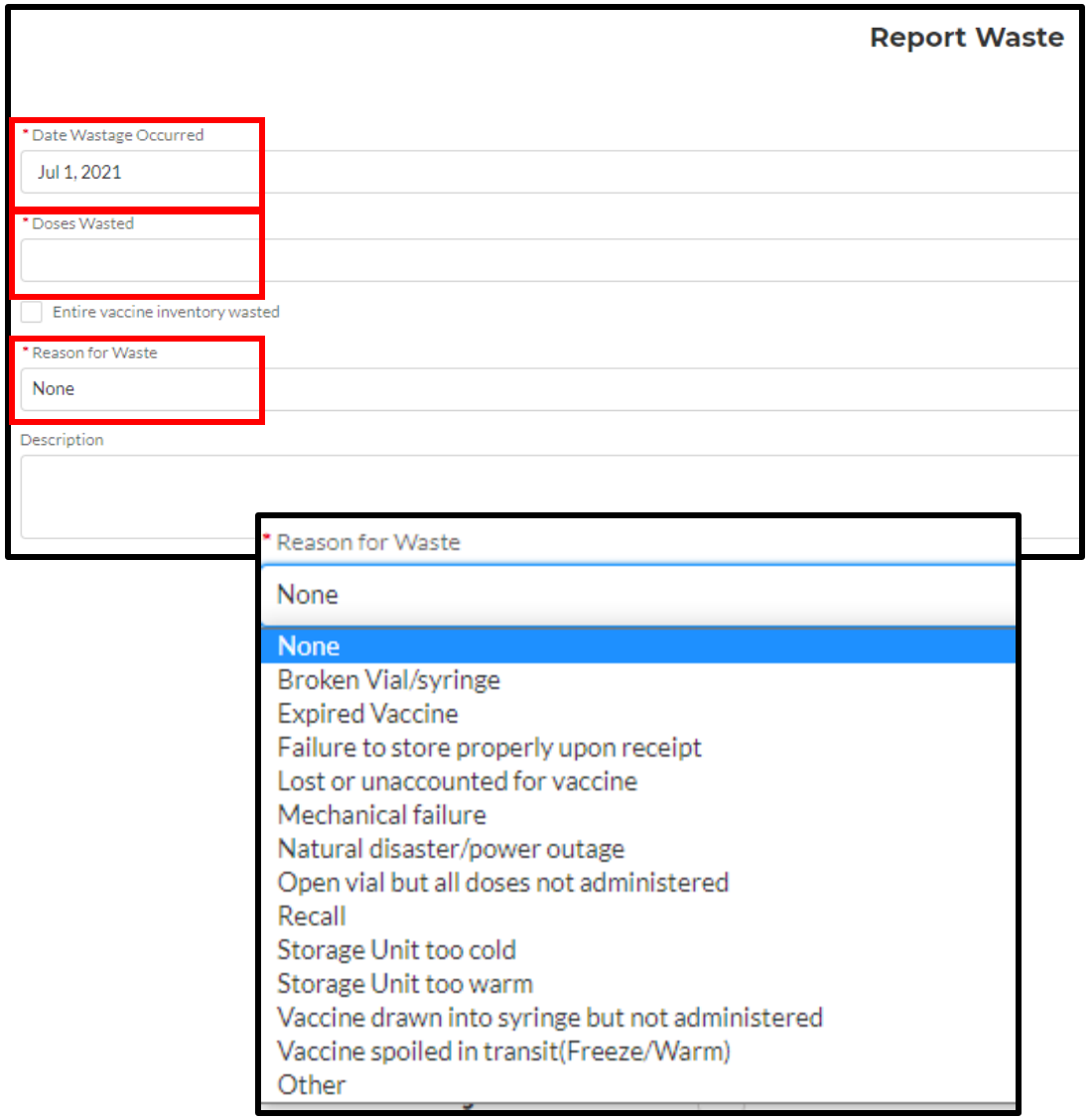

## Audience

**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**

## Tips

If an inventory reaches expiration, you can check **ENTIRE VACCINE INVENTORY WASTED** then select **EXPIRED VACCINE** from the dropdown. This will change your available doses to zero.

# 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.

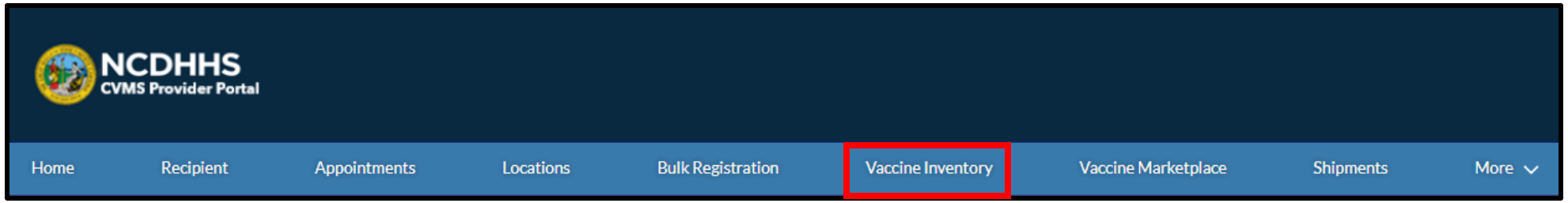
# Log Insufficient Quantity

# 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**

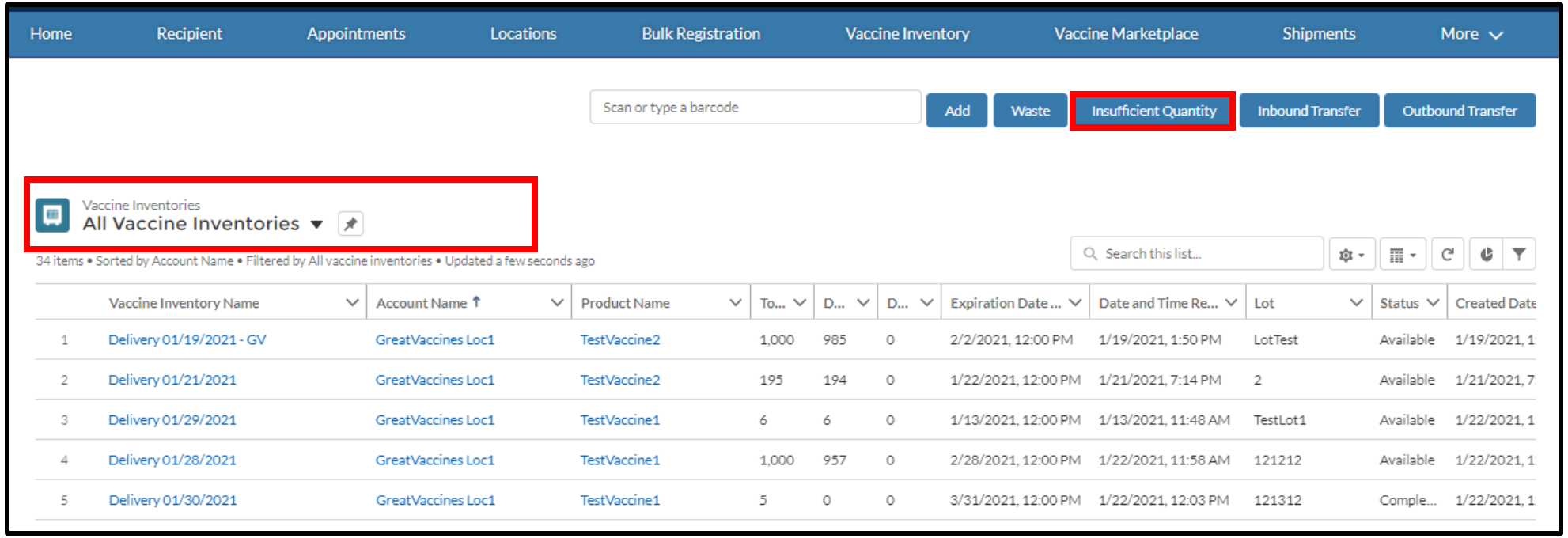
**Healthcare Location Manager**

# 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**

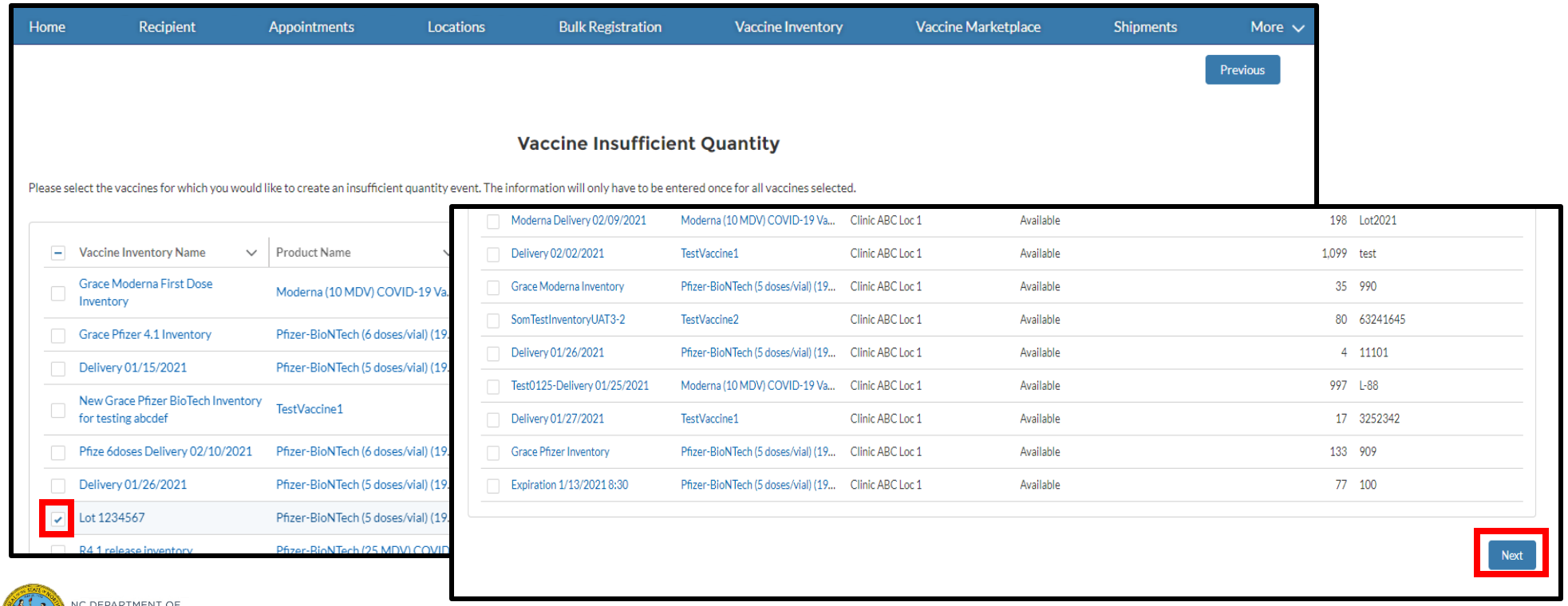
## Tips

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

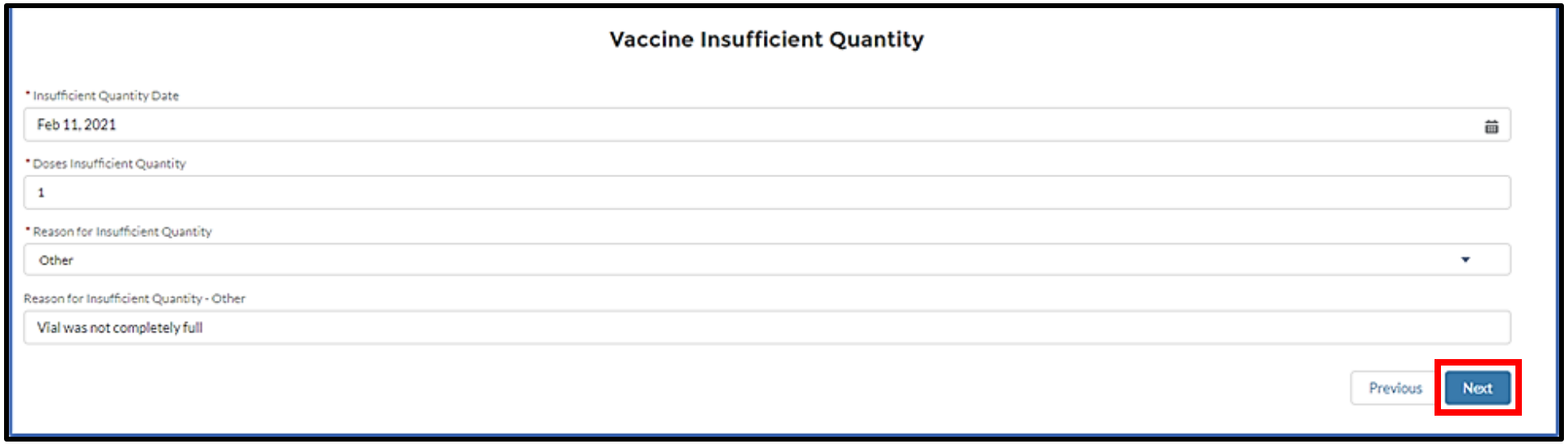
**Healthcare Location Manager**

## 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**

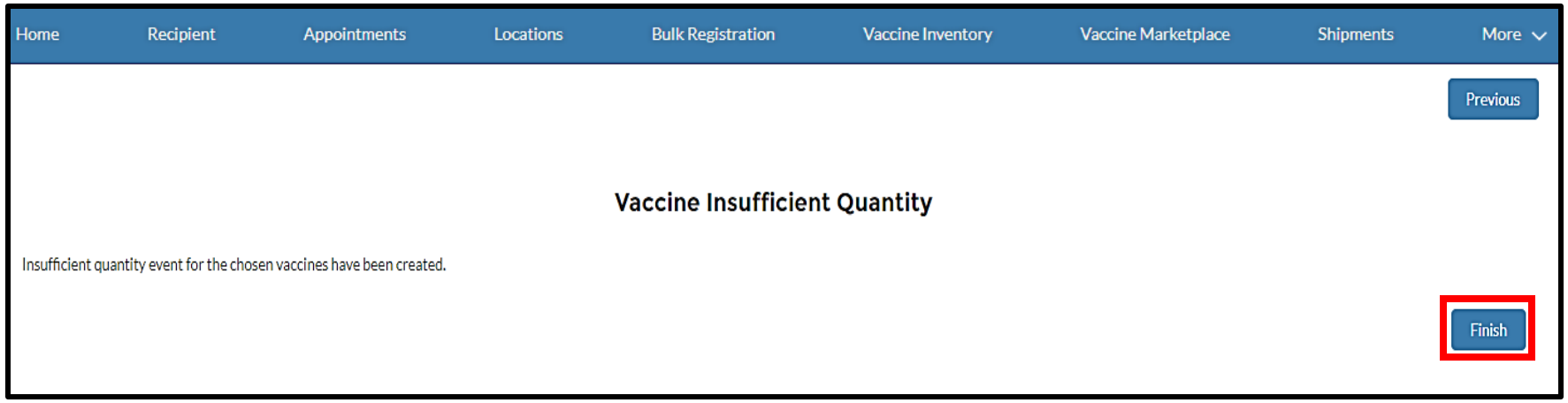
**Tips**

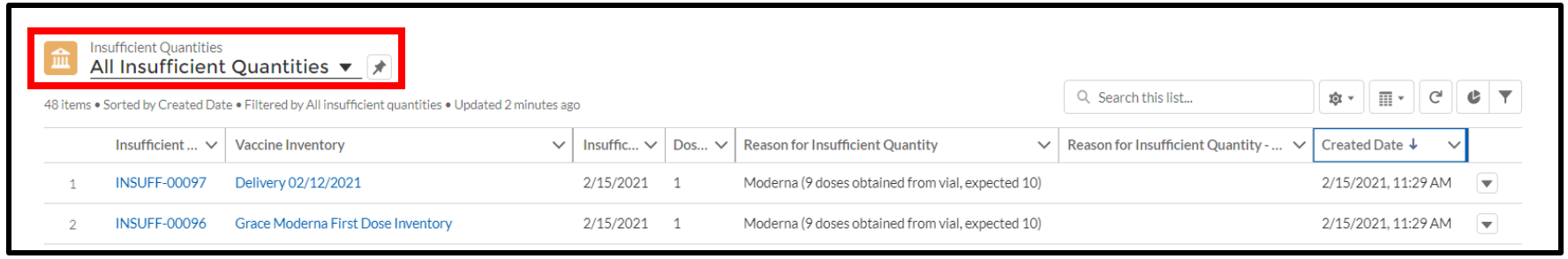
For **Doses Insufficient Quantity**, select the number of doses missing from each vial.

# 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

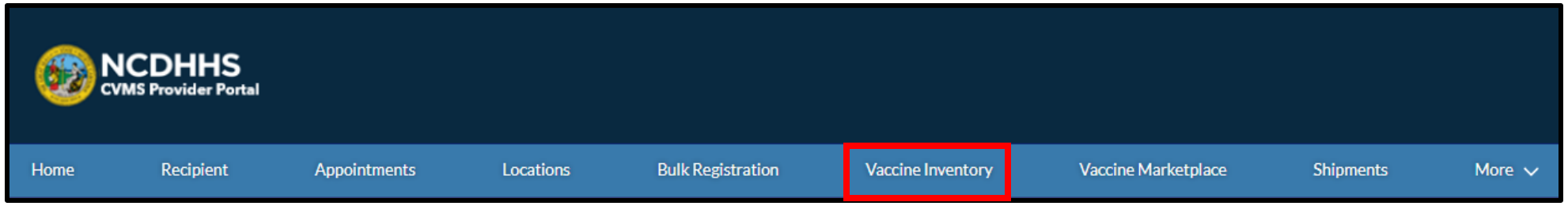
After clicking **FINISH**, you will see your Vaccine Insufficient Quantity record displayed on the **All Insufficient Quantities List View.**

# Edit Deprecation Events

# Step 1 of 4: Navigate to the Vaccine Inventory tab

In the event that a deprecation event was incorrectly entered, the event record can be edited to reflect the corrected information.

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**

**Tips**

The process for editing both Wastage and Insufficient Quantities is identical.

# Step 2 of 4: Select the Vaccine Inventory to be Corrected

1. Search the list
2. Select the Vaccine Inventory Record to edit

Home | Recipient | Appointments | Locations | Bulk Registration | Vaccine Inventory | Vaccine Marketplace | Shipments | More

Scan or type a barcode | Add | Waste | Insufficient Quantity | Inbound Transfer | Outbound Transfer

Vaccine Inventories
All Vaccine Inventories

29 items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

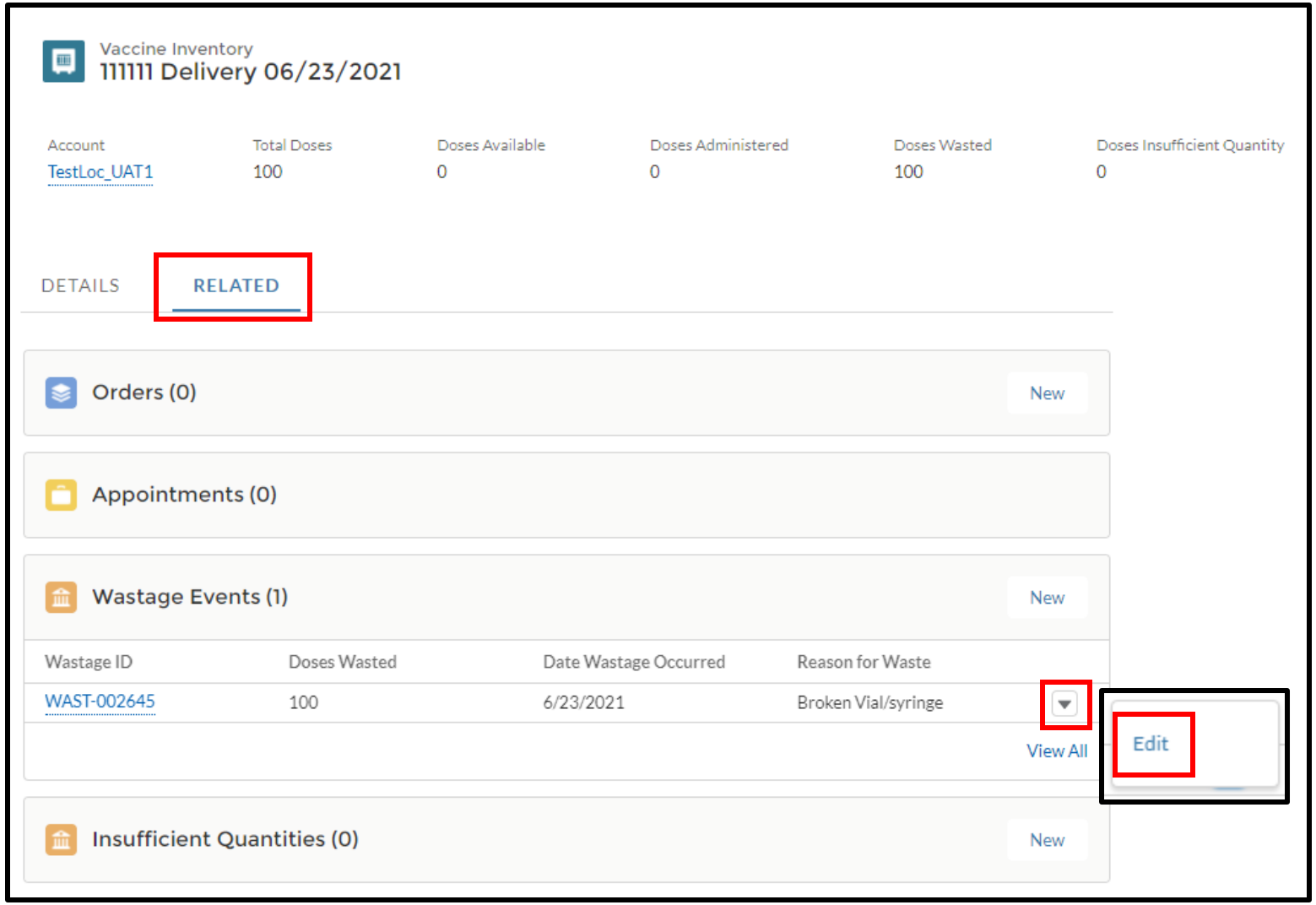
Search this list...

| | Vaccine I... | NDC (Prod... | Account Na... | Product N... | Lot | To... | Dos... | D... | Ex... | Do... | Status | Expiration ... | Date Recei... | Created Da... |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 1000 Additional | 59267-1000-02 | TestLoc_UAT1 | Pfizer-BioNTe... | pfi10000 | 10,000 | 9,999 | 2 | 1 | 0 | Available | 5/31/2021, 12:... | 5/10/2021, 4:2... | 5/10/2021, 4:2... |
| 2 | 111111 Delive... | 80777-0273-99 | TestLoc_UAT1 | Moderna (10 ... | 111111 | 100 | 0 | 0 | | 100 | Complete | 7/31/2021, 12:... | 6/23/2021, 2:1... | 6/23/2021, 2:1... |
| 3 | CheckSameOr... | 59267-1000-02 | TestLoc_UAT1 | Pfizer-BioNTe... | 11 | 100 | 4 | 0 | | 0 | Available | 9/30/2021, 12:... | 6/25/2021, 4:3... | 6/25/2021, 4:3... |
| 4 | Delivery 05/12... | 59267-1000-02 | TestLoc_UAT1 | Pfizer-BioNTe... | PF27521 | 1,170 | 1,155 | 1 | | 14 | Available | 9/24/2021, 12:... | 5/12/2021, 12:... | 5/12/2021, 12:... |
| 5 | Delivery 06/11... | 59267-1000-02 | Training Team ... | Pfizer-BioNTe... | 1234567 | 0 | 0 | 0 | 0 | 0 | Incoming Trans... | 1/1/2022, 12:0... | | 6/11/2021, 11:... |
| 6 | Delivery 06/24... | 22222-222-22 | Training Team ... | TestVaccine2 (... | 1 | 100 | 0 | 2 | | 98 | Wasted | 6/30/2021, 12:... | 6/24/2021, 6:1... | 6/24/2021, 6:1... |
| 7 | Delivery 06/25... | 80777-0273-99 | TestLoc_UAT1 | Moderna (10 ... | 11 | 60 | 40 | 0 | 0 | 0 | Available | 9/16/2021, 12:... | 6/25/2021, 12:... | 6/25/2021, 4:3... |
| 8 | EHR Vaccine | 59267-1000-03 | TestLoc_UAT1 | Pfizer-BioNTe... | 10021 | 100 | 91 | 9 | | 0 | Available | 10/14/2021, 1... | 6/17/2021, 12:... | 6/17/2021, 1:0... |
| 9 | FED Test3 06/25 | 80777-0273-99 | TestLoc_UAT1 | Moderna (10 ... | 1231 | 40 | 40 | 0 | | 0 | Available | 10/13/2021, 1... | 6/25/2021, 11:... | 6/25/2021, 11:... |
| 10 | FED-Mod Test | 80777-0273-99 | TestLoc_UAT1 | Moderna (10 ... | Mod112 | 50 | 50 | 0 | | 0 | Available | 7/31/2021, 12:... | 6/28/2021, 11:... | 6/28/2021, 11:... |

## Audience

**Healthcare Location Manager**

# Step 3 of 4: Navigate to the Related Tab




1. From the Vaccine Inventory Record, navigate to the **RELATED** Tab
2. Find the deprecation event to edit (under **WASTAGE EVENTS** or **INSUFFICIENT QUANTITIES**)
3. Navigate to the Action Arrow and click **EDIT**

## Audience

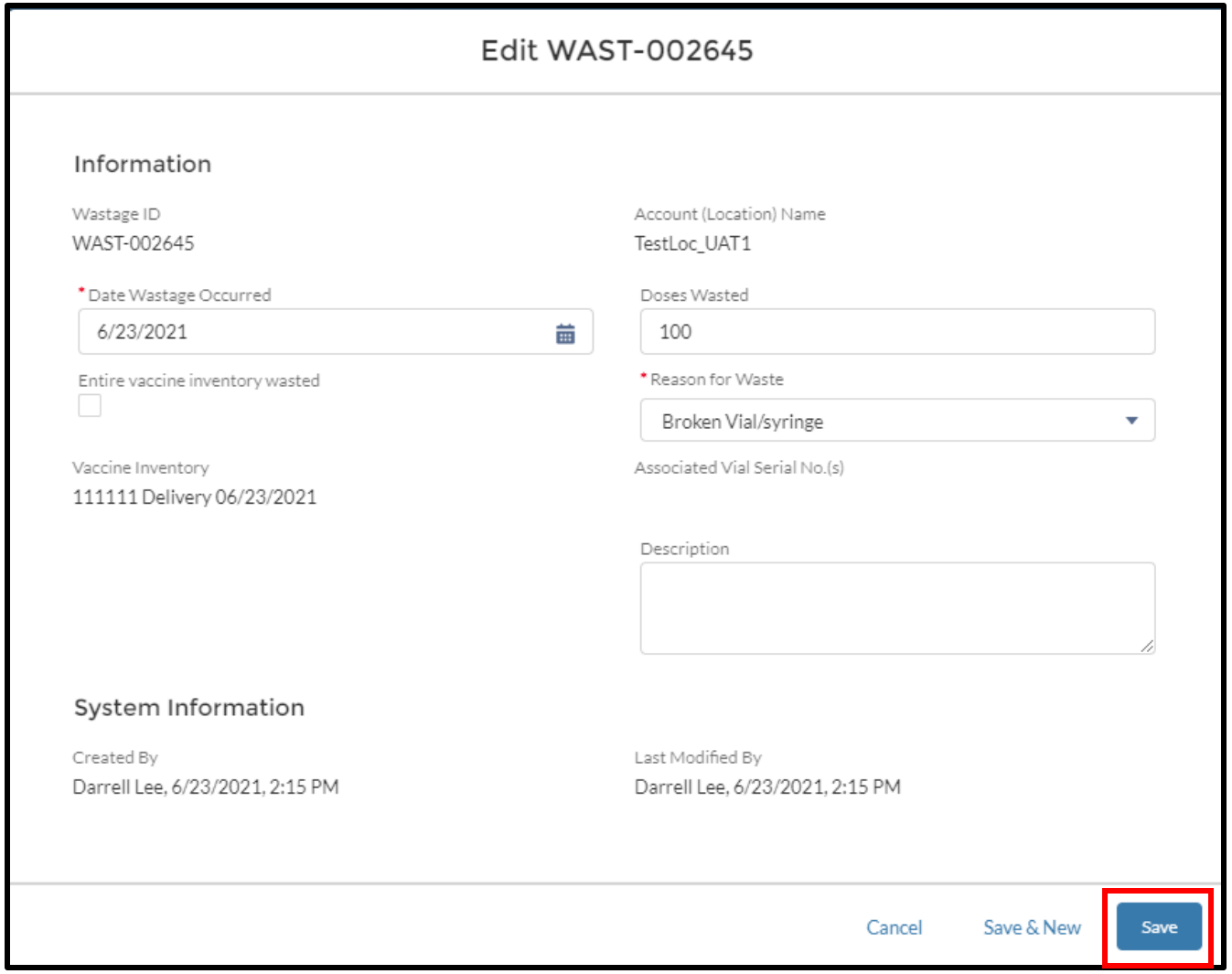
**Healthcare Location Manager**

## Tips

New deprecation events can also be created by clicking **NEW.**

# Step 4 of 4: Complete the Edit

1. Complete the edit(s)
2. Click **SAVE**




## Audience

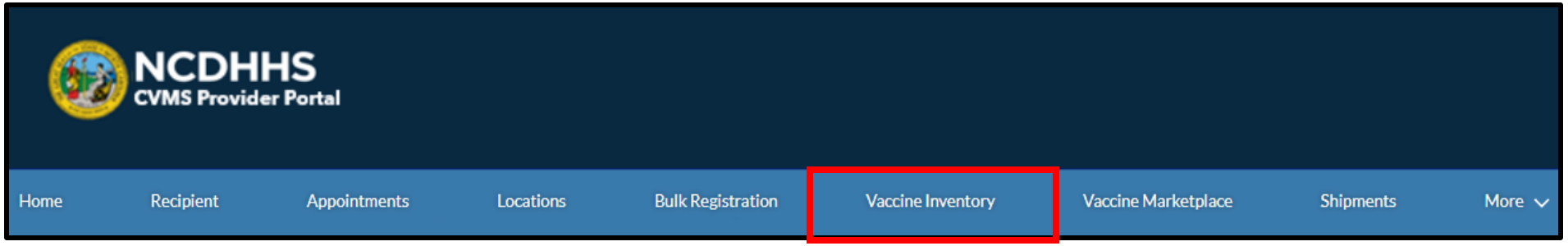
**Healthcare Location Manager**

# Other Inventory Operations Available in CVMS

# Edit or Update Vaccine Inventory Record Details

# Step 1 of 3: Navigate to the Vaccine Inventory tab

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




## Audience

**Healthcare Location Manager**

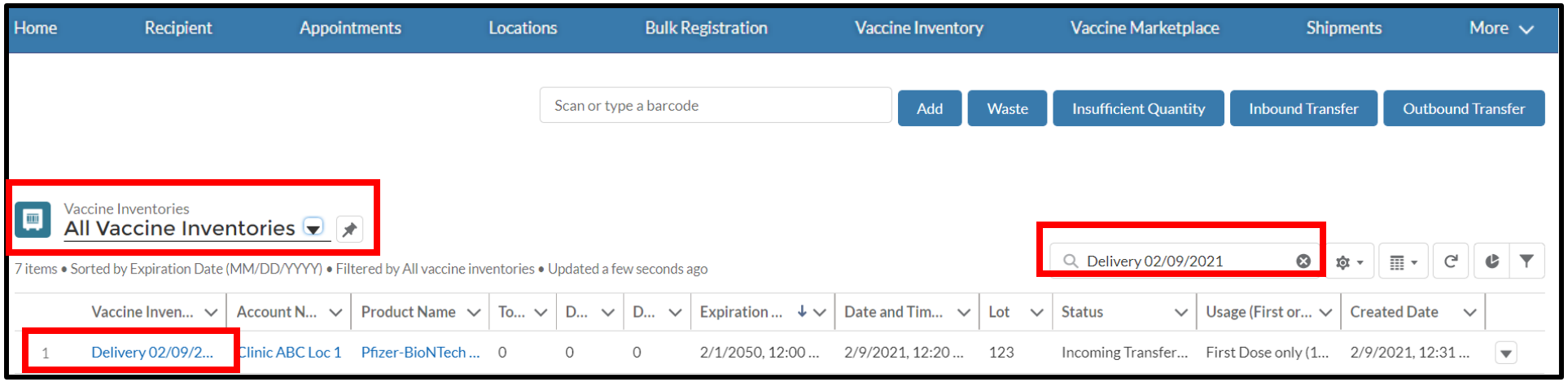
## Tips

NOTE: Federal COVID-19 vaccine allocations to Federal Pharmacy Partners are NOT tracked or managed in CVMS.

# Step 2 of 3: Navigate to Vaccine Inventory Record

Use the All Vaccine Inventories List View to locate the specific record you need to update. You can **SEARCH or SORT** in the list view.

1. Identify the **VACCINE INVENTORY RECORD** that you wish to update
2. Click the **VACCINE INVENTORY NAME HYPERLINK**

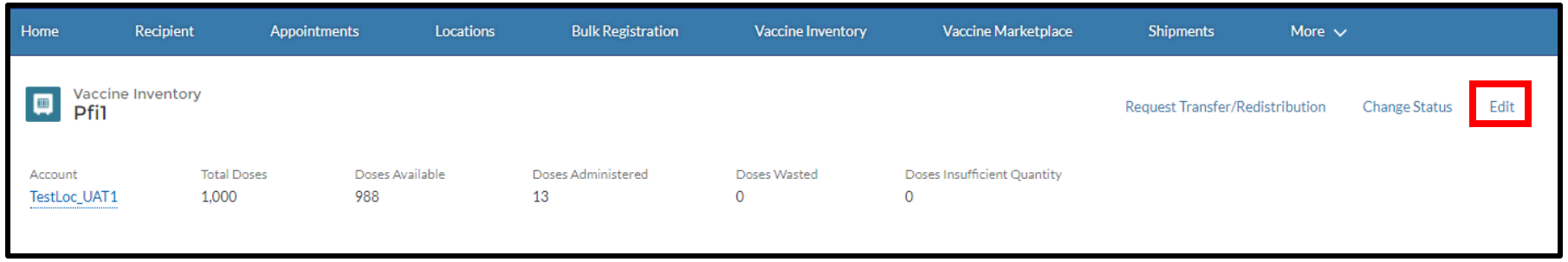


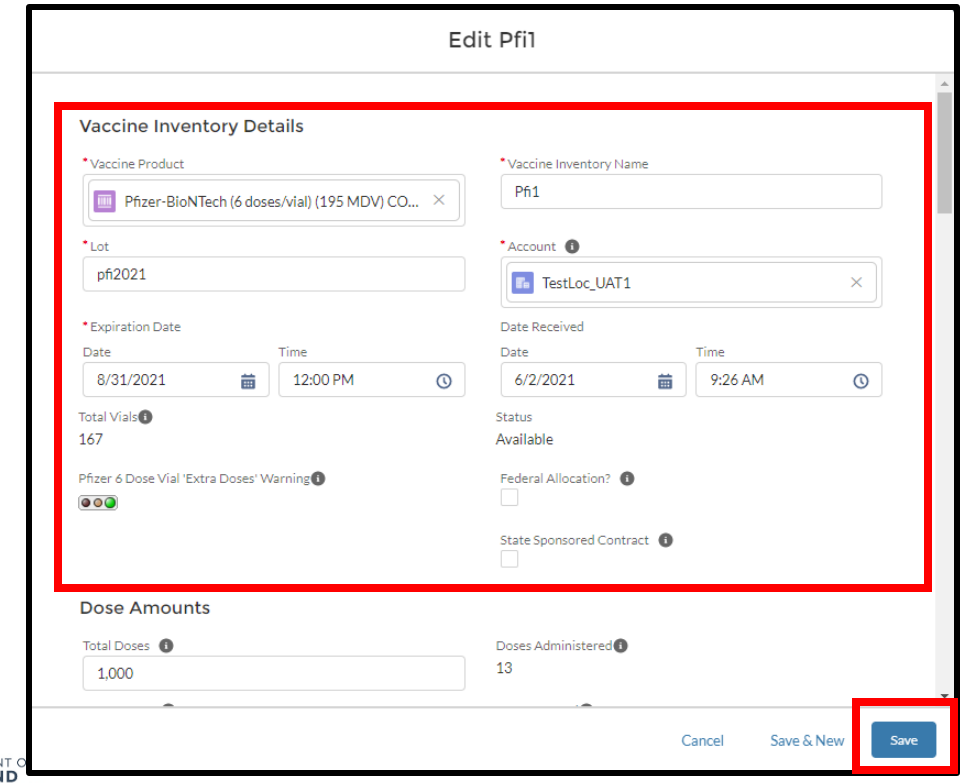

## Audience

**Healthcare Location Manager**

# Step 3 of 3: Update the Vaccine Inventory Record

Before you edit, make sure you are on the appropriate record.




*Remember, you must always save your changes.*

1. Click the **EDIT BUTTON** on the right-hand side
2. Locate the field you want to make changes to
3. Update the field
4. Click **SAVE**
5. If the field does not update, click **REFRESH** and try again

## Audience

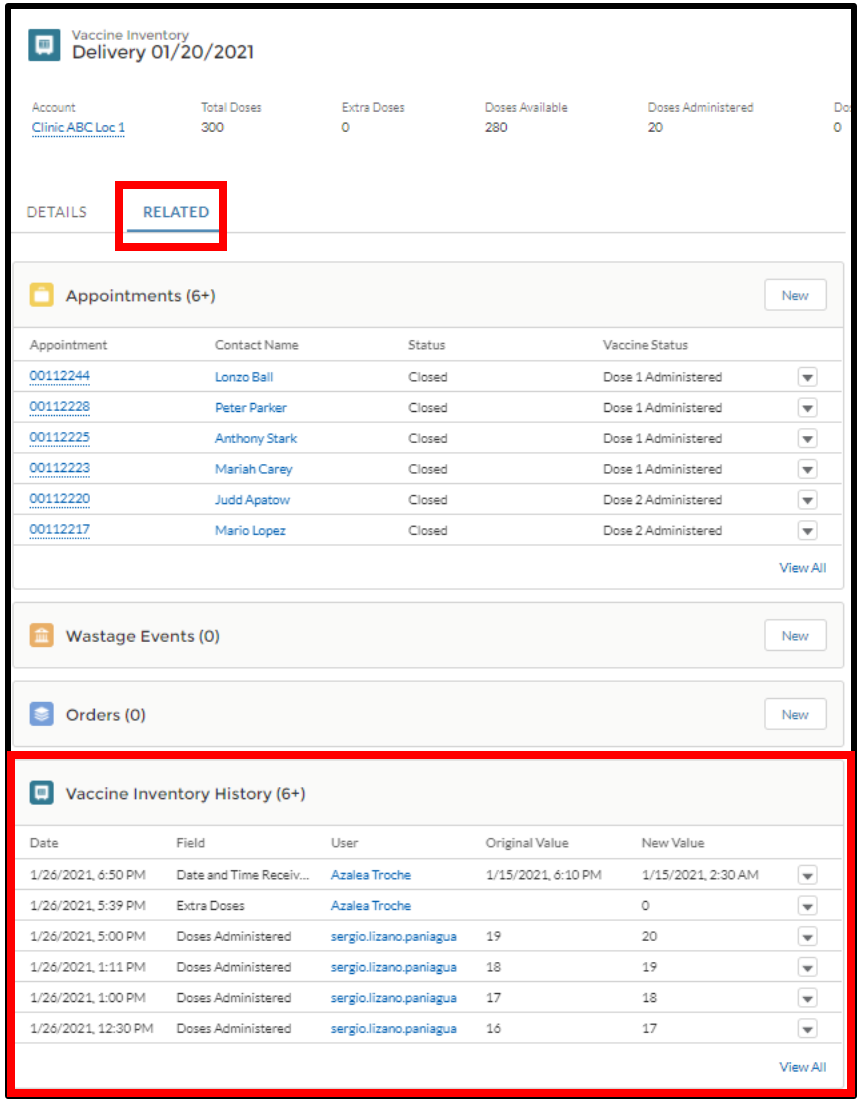
**Healthcare Location Manager**

## Tips

Vaccine Inventory Status can be edited by Completing the Vaccine Inventory (Review next section).

If additional doses of the Vaccine Inventory are identified, use the Extra Doses field to edit that Inventory directly.

# Reviewing Vaccine Inventory History




All changes and edits made to the Vaccine Inventory Record are captured within the CVMS Provider Portal in the Vaccine Inventory History.

1. From the Vaccine Inventory Record, click on the **RELATED** tab.
2. Scroll down to **VACCINE INVENTORY HISTORY**
3. Review all Vaccine Inventory History

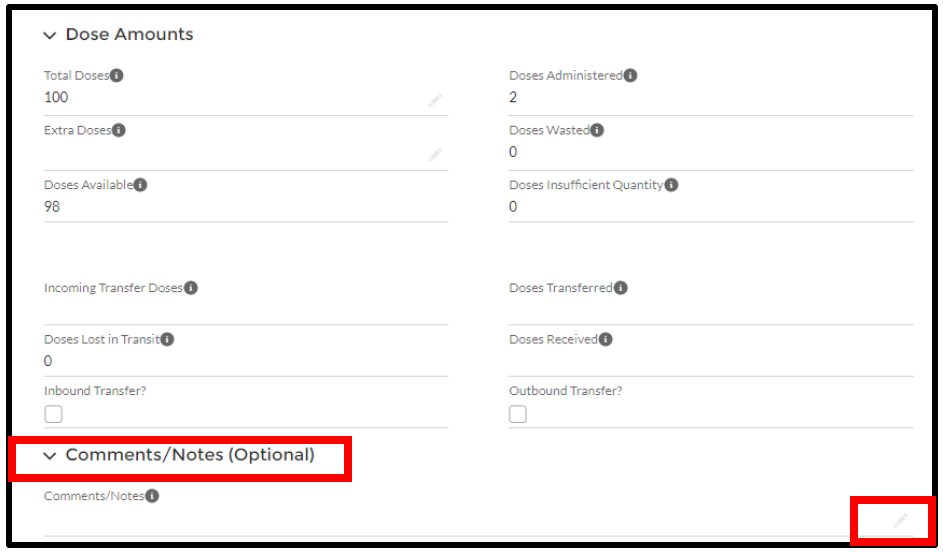
*Click View All to look at all the Vaccine Inventory History changes made to the record.*

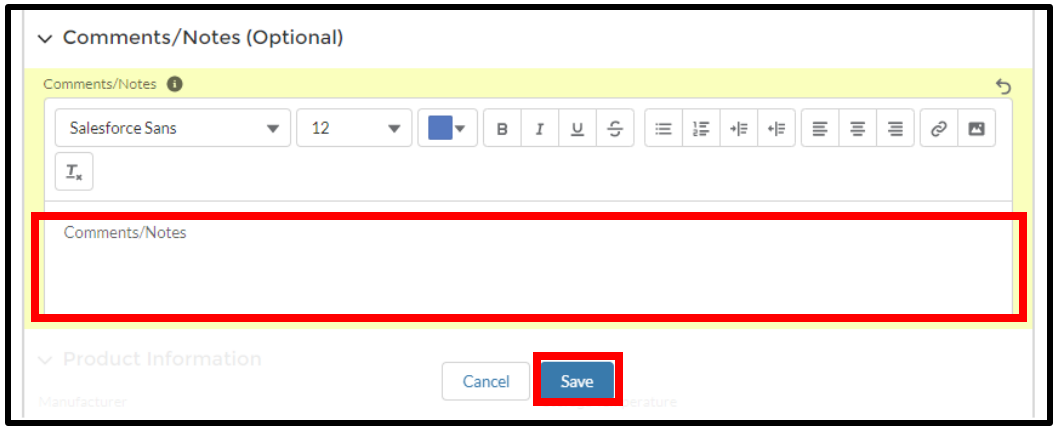
**Audience**

**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Adding Comments/Notes to a Vaccine Inventory Record




Any comments/notes related to the Vaccine Inventory record can be captured in the **COMMENTS/NOTES** field.

1. From the Vaccine Inventory Record, scroll down to the **COMMENTS/NOTES (OPTIONAL) SECTION**
2. Click the pencil icon to edit
3. Add any comments/notes in the free text field and click **SAVE**

**Audience**

**Healthcare Location Manager**

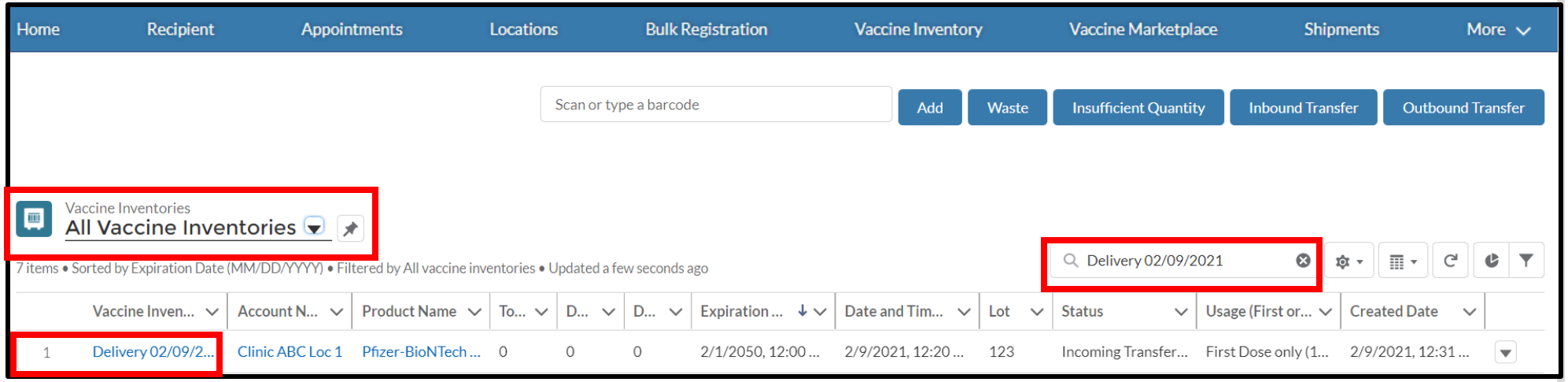
NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Mark a Vaccine Inventory as Complete or Reserved for Future Use

# Step 1 of 3: Navigate to Vaccine Inventory Record

When a Vaccine Inventory record has zero available dose left, and no extra dose can be extracted from the vials, you will be able to update the Vaccine Inventory record status as Complete. This will help the NCDHHS allocation team to identify which Vaccine Inventory records do not have any remaining doses to be administered.

1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORD** that you wish to update
2. Click the **VACCINE INVENTORY NAME HYPERLINK**

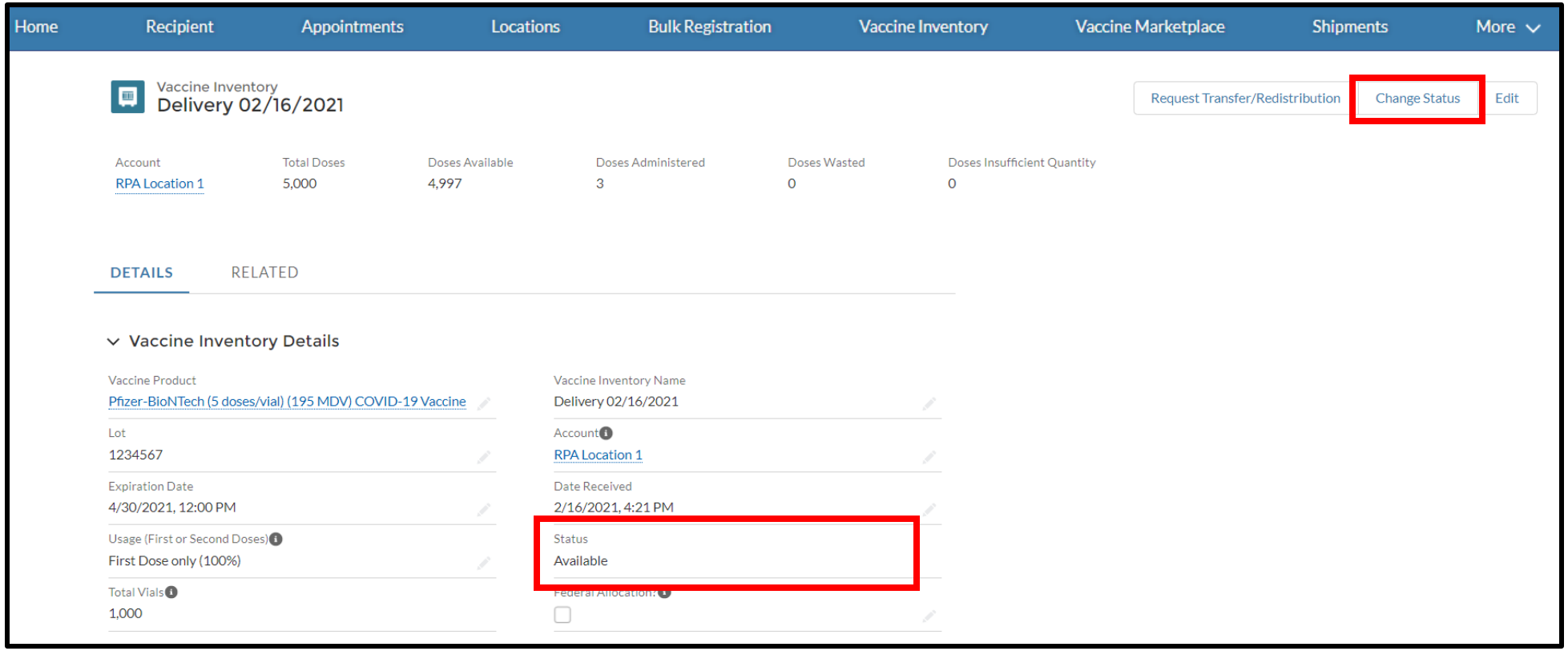



## Audience

**Healthcare Location Manager**

# Step 2 of 3: Click the Change Status Button

1. At the top of the Vaccine Inventory page, locate the **CHANGE STATUS** button
2. Click the **CHANGE STATUS** button



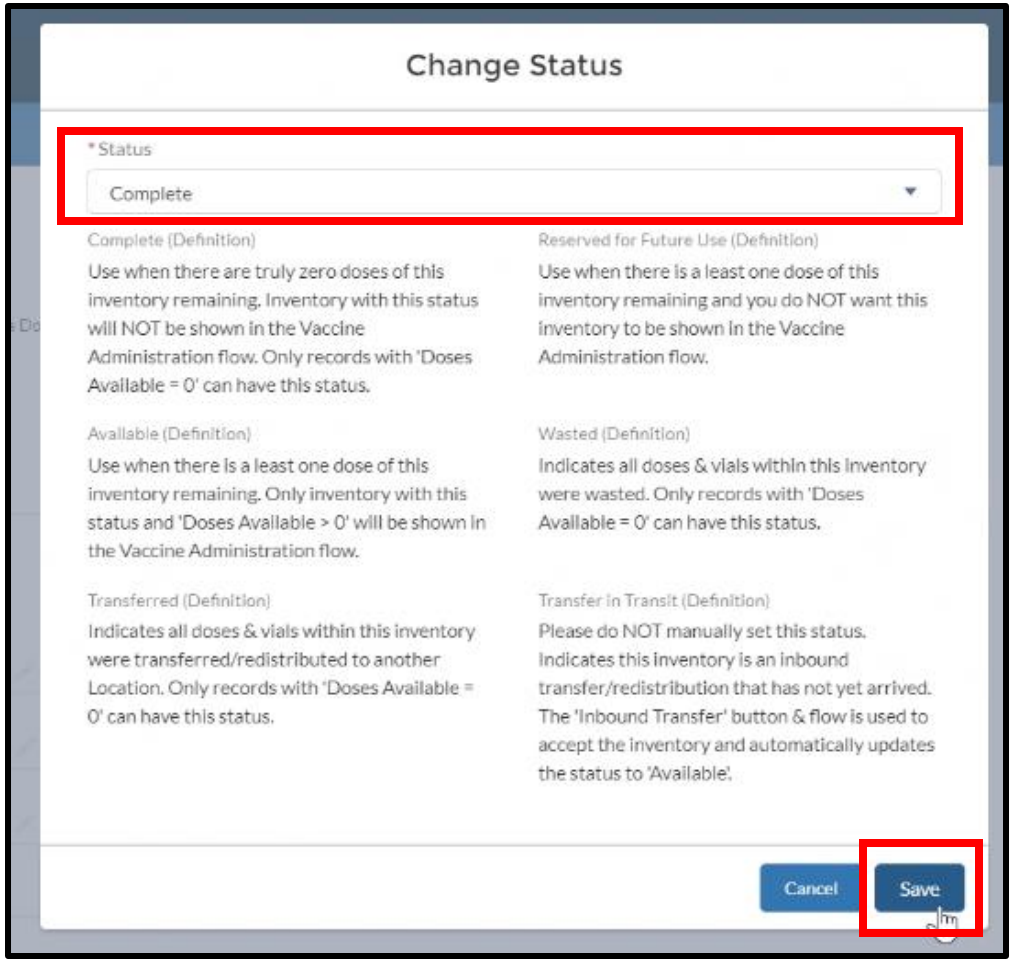

## Audience

**Healthcare Location Manager**

# Step 3 of 3: Select the Complete Status & Save

You will be prompted to update the **STATUS**. Once you save your changes, the Vaccine Inventory status will update accordingly. Definitions for each status are provided on this screen to ensure you select the appropriate **STATUS**.

1. Select the appropriate **STATUS**
   - Complete
   - Reserved for Future Use
   - Available
   - Transferred
   - Wasted
   - Incoming Transfer in Transit
2. Click **SAVE**




**Audience**

**Healthcare Location Manager**

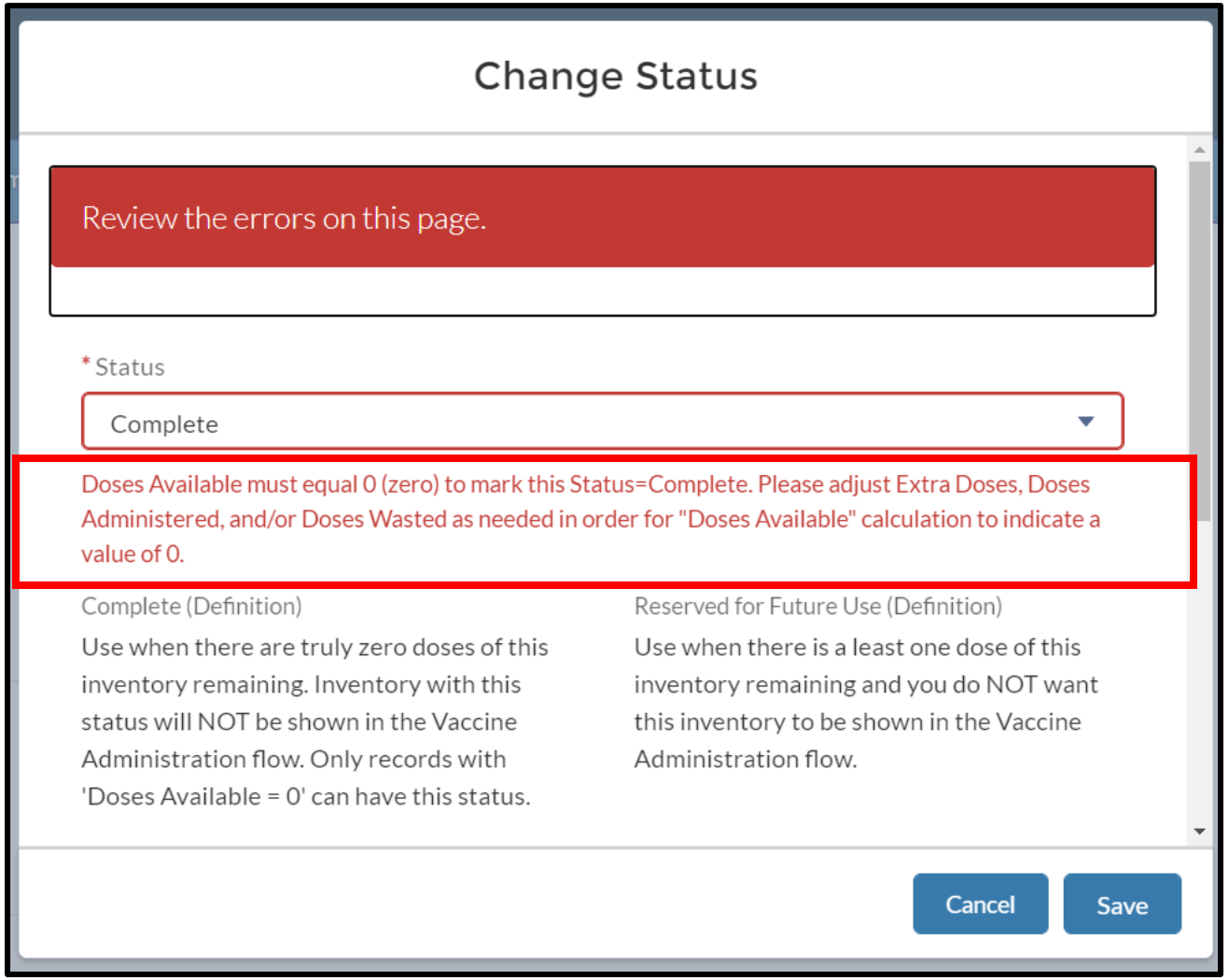
**Tips**

Use this feature to update the Vaccine Inventory status to Complete when you have zero doses available.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Failed Complete Status Update

The alert screen below will be displayed if your doses available does not equal 0. You will be unable to update the Vaccine Inventory Status to Complete until the appropriate adjustments are made to your Vaccine Inventory. Once resolved, you can go back and Complete the Vaccine Inventory Status.

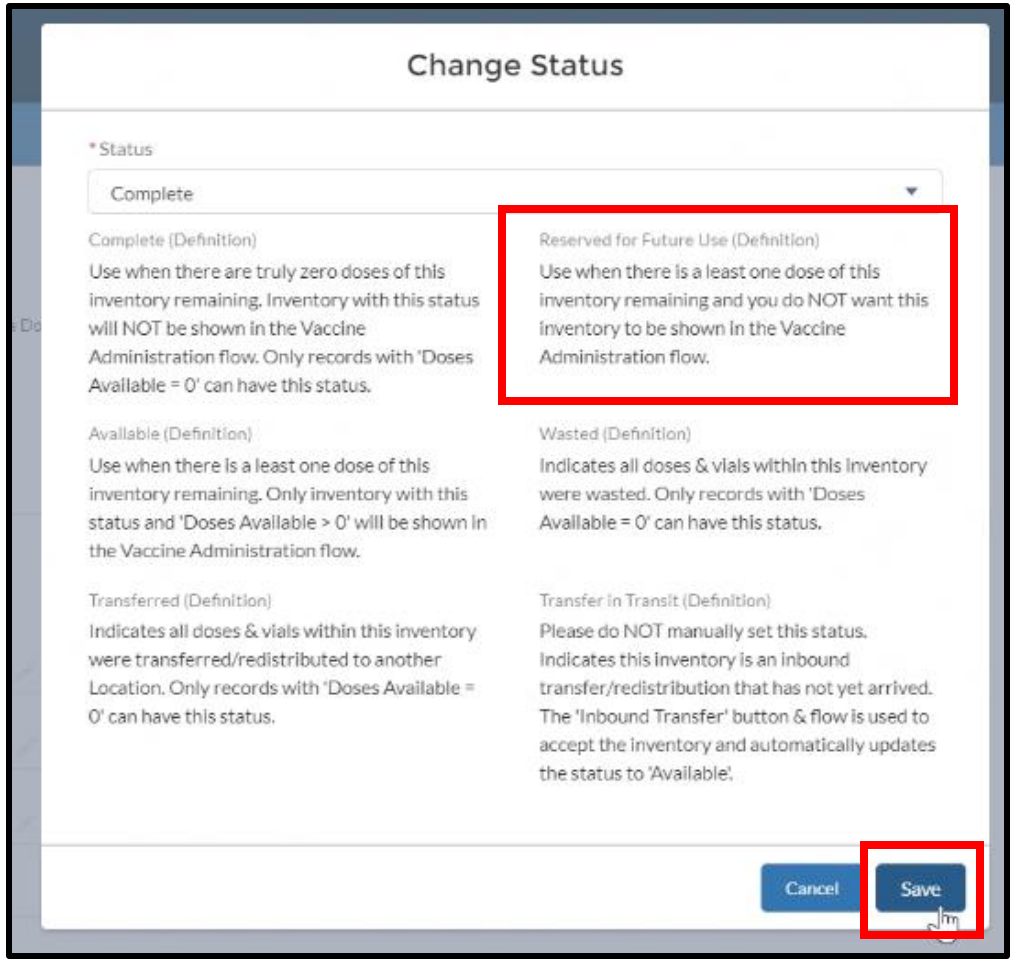



**Audience**

Healthcare Location Manager

# Reserved for Future Use Status

Putting a Vaccine Inventory Record in the **RESERVED FOR FUTURE USE** status will remove it from being displayed on the vaccination administration screen for Healthcare Providers to select when vaccinating recipients.




## Audience

**Healthcare Location Manager**

## Tips

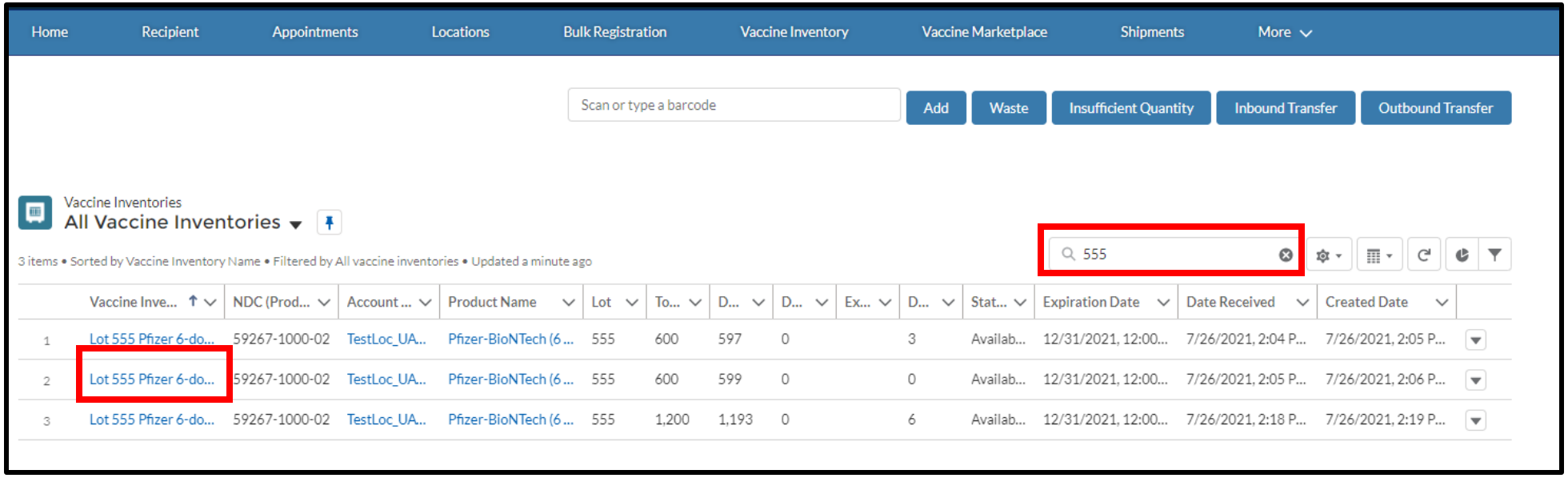
This status may be helpful to flag Inventory Records at a location that should not be selected by Healthcare Providers when vaccinating recipients (e.g., reserved for second dose, reserved for upcoming mass vaccination clinic, flagged for transfer or redistribution).

# Consolidate Available Doses from Multiple Vaccine Inventory Records in a Single Inventory Record

# Step 1 of 4: Navigate to Vaccine Inventory Record to Consolidate

To reduce the number of vaccine inventory records and to aid with vaccine management, inventory records for the same product from the same lot can have the available doses consolidated into a single record. To do so, follow these instructions:

1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORDS** that you wish to increase with available doses from other inventory records
2. Click the **VACCINE INVENTORY NAME HYPERLINK** to open it




## Audience

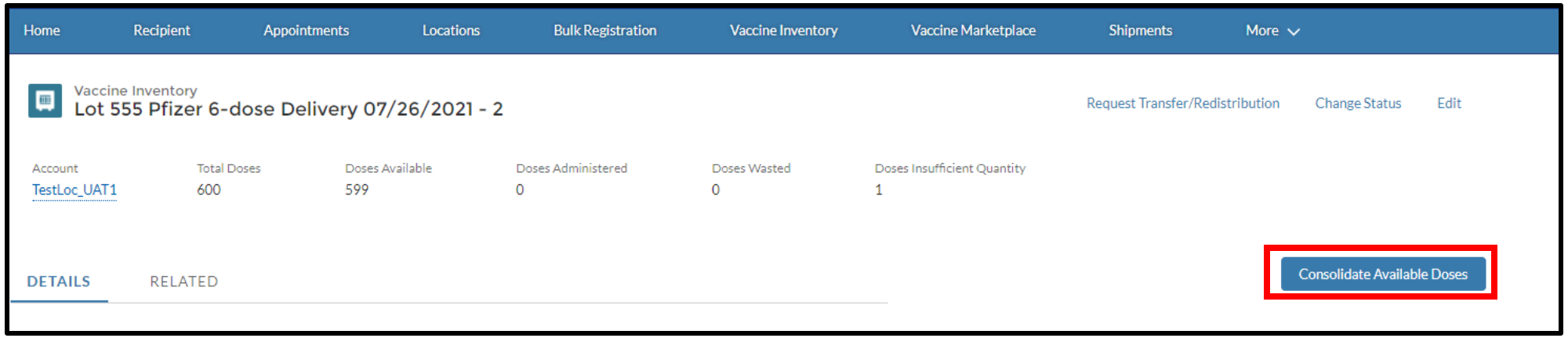
**Healthcare Location Manager**

## Tips

Use the search feature to search the lot number. If the recommended best practice of entering the lot number to each vaccine inventory name, this will display all records from the desired lot to consolidate.

# Step 2 of 4: Open the Consolidate Available Doses Feature

1. Click on **CONSOLIDATE AVAILABLE DOSES**




## Audience

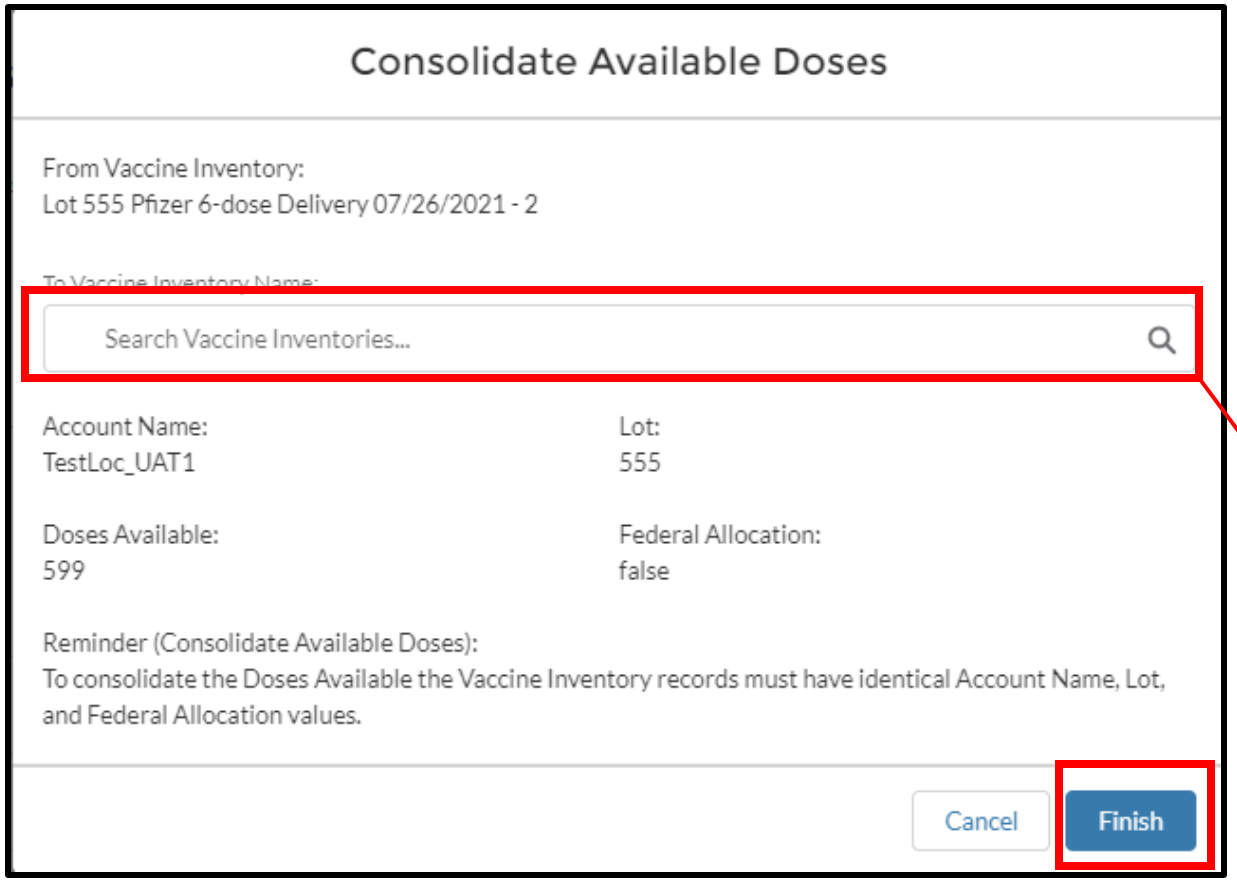
**Healthcare Location Manager**

# Step 3 of 4: Consolidate the Records

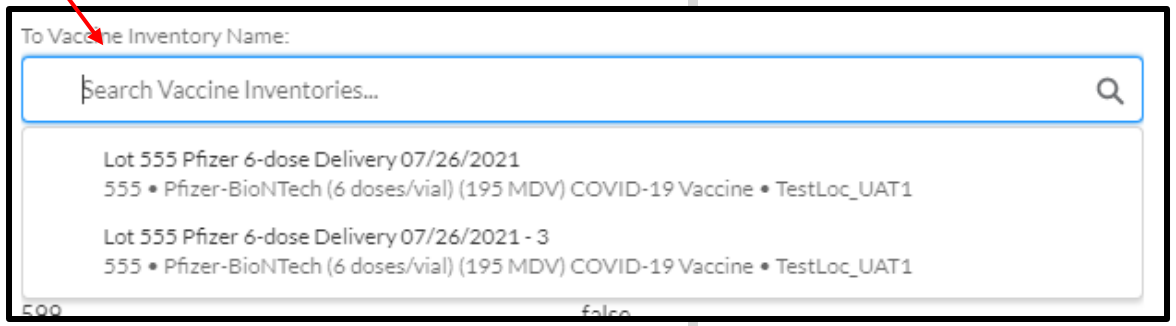
1. Select the **VACCINE INVENTORY NAME** for the record(s) to consolidate
2. Click **FINISH**
3. Repeat Step 2 and 3 if you wish to consolidate more records

**Audience**

**Healthcare Location Manager**




4. The inventory selected in this step will have its number of Available Doses reduced to 0, while the available doses of the inventory selected in the previous step will be increased by the same amount.



# Step 4 of 4: Check Consolidated Inventories

After the records have been consolidated, the available doses are all transferred from the other records.

Notice that those vaccine inventory records still exist and still maintain their own history to include deprecation events. These records can now be marked as “complete”.

**Audience**

**Healthcare Location Manager**

Home | Recipient | Appointments | Locations | Bulk Registration | Vaccine Inventory | Vaccine Marketplace | Shipments | More

Scan or type a barcode | Add | Waste | Insufficient Quantity | Inbound Transfer | Outbound Transfer

Vaccine Inventories
All Vaccine Inventories

3 items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated 6 minutes ago

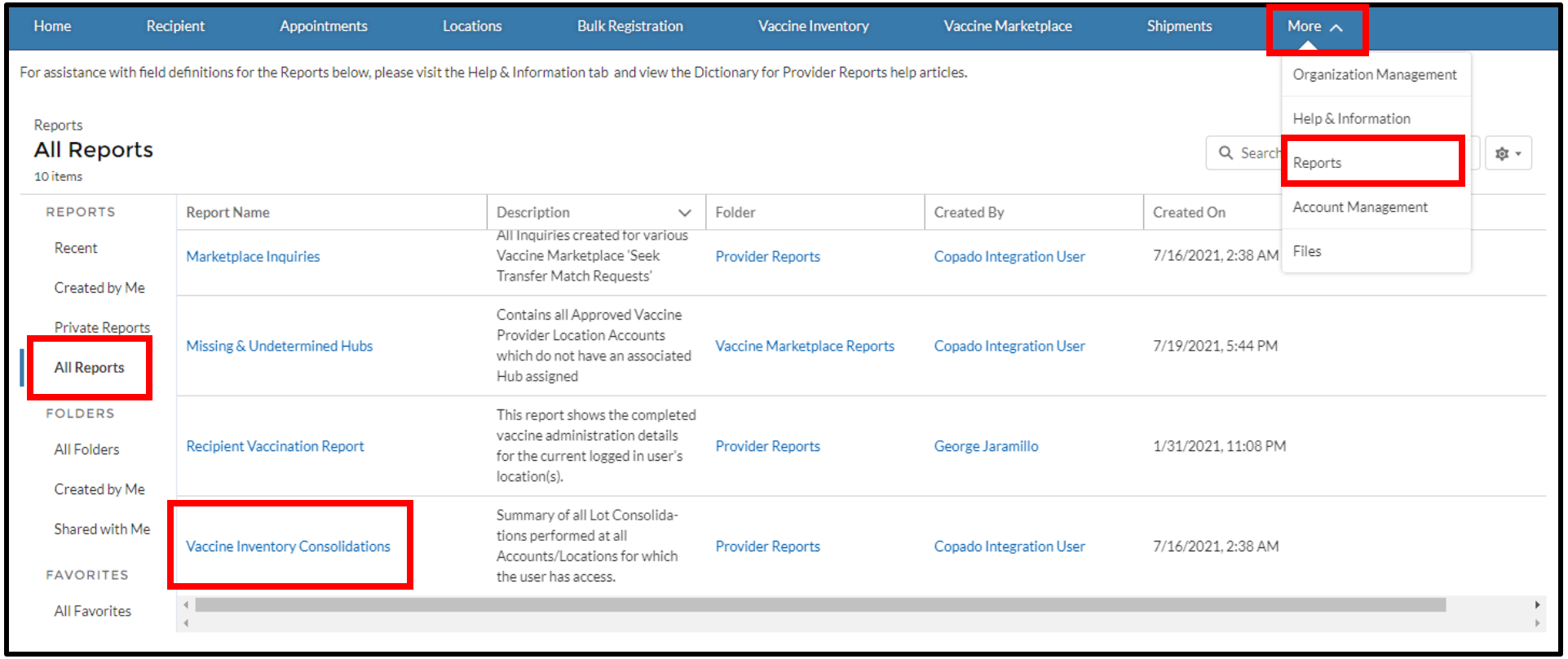
555

| | Vaccine Inventory Name | NDC (Prod... | Account ... | Product Name | Lot | To... | D... | D... | Ex... | D... | Stat... | Expiration Date | Date Received | Created Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Lot 555 Pfizer 6-dose Deliver... | 59267-1000-02 | TestLoc_UA... | Pfizer-BioNTech (6... | 555 | 2,392 | 2,389 | 0 | | 3 | Availab... | 12/31/2021, 12:00... | 7/26/2021, 2:04 PM | 7/26/2021, 2:05 P... |
| 2 | Lot 555 Pfizer 6-dose Deliver... | 59267-1000-02 | TestLoc_UA... | Pfizer-BioNTech (6... | 555 | 1 | 0 | 0 | 0 | 0 | Availab... | 12/31/2021, 12:00... | 7/26/2021, 2:05 PM | 7/26/2021, 2:06 P... |
| 3 | Lot 555 Pfizer 6-dose Deliver... | 59267-1000-02 | TestLoc_UA... | Pfizer-BioNTech (6... | 555 | 7 | 0 | 0 | 0 | 6 | Availab... | 12/31/2021, 12:00... | 7/26/2021, 2:18 PM | 7/26/2021, 2:19 P... |

# Access the Vaccine Inventory Consolidations Report

The Vaccine Inventory Consolidations report displays all lot consolidations performed at all locations for which the user has access.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **VACCINE INVENTORY CONSOLIDATIONS REPORT**




## Audience

**Healthcare Location Manager**

## Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal.

# Access the Vaccine Inventory Consolidations Report (Continued)

This report will allow you to trace how many available doses were moved from an inventory record to another.

Home | Recipient | Appointments | Locations | Bulk Registration | Vaccine Inventory | Vaccine Marketplace | Shipments | More

Report: Vaccine Inventories with Lot Consolidation Audit Logs

**Vaccine Inventory Consolidations**

Summary of all Lot Consolidations performed at all Accounts/Locations for which the user has access.

Add Chart | Export

| Total Records | Total # Doses Consolidated (Actual) | Total Consolidate All Available Dos... |
|---|---|---|
| 3 | 1,802 | 3 |

| | Lot Consolidation Audit Log: Lot Consolidation Audit Log Name | # Doses Consolidated (Actual) | Lot | Vaccine Inventory Name | Vaccine Inventory (To/Increment) | Account Name | Lot Consolidation |
|---|---|---|---|---|---|---|---|
| 1 | LOTCONS-0003 | 10 | 10 | Delivery 07/23/2021 | RegressionTestInvTC01 | TestLoc_UAT1 | |
| 2 | LOTCONS-0005 | 599 | 555 | Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 2 | Lot 555 Pfizer 6-dose Delivery 07/26/2021 | TestLoc_UAT1 | |
| 3 | LOTCONS-0006 | 1,193 | 555 | Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 3 | Lot 555 Pfizer 6-dose Delivery 07/26/2021 | TestLoc_UAT1 | |
| 4 | | 1,802 | | | | | |

## Audience

Healthcare Location Manager

# Receive Federally Allocated Vaccine Inventory (FEMA and FQHC Organizations Only)

# Receiving Inventory from Federal Allocation Overview

A **federally allocated vaccine inventory** means that the vaccine inventory shipment was sent on behalf of the Federal Government.

- **State Allocations**: If the inventory is sent on behalf of the State, your primary Vaccine Coordinator should have been sent an email and a shipment record should be available in the CVMS Provider Portal.
- **Federal Allocations**: If the inventory is sent on behalf of the Federal Government, there will **NOT** be a shipment record in the CVMS Provider Portal, and you should follow the steps below to mark the inventory as Federal Allocation in the CVMS Provider Portal.

**This process is designed primarily for FEMA and FQHC designated locations. Non-FEMA/FQHC Provider that also receive Vaccine Inventory from 'Federal Allocation' should also mark those inventories. If the option to mark the inventory is not available, please contact the CVMS Help Desk (instructions on slide 2).**

**NOTE: Federal COVID-19 vaccine allocations to Federal Pharmacy Partners are NOT tracked or managed in CVMS.**

**Audience**

**Healthcare Location Manager**

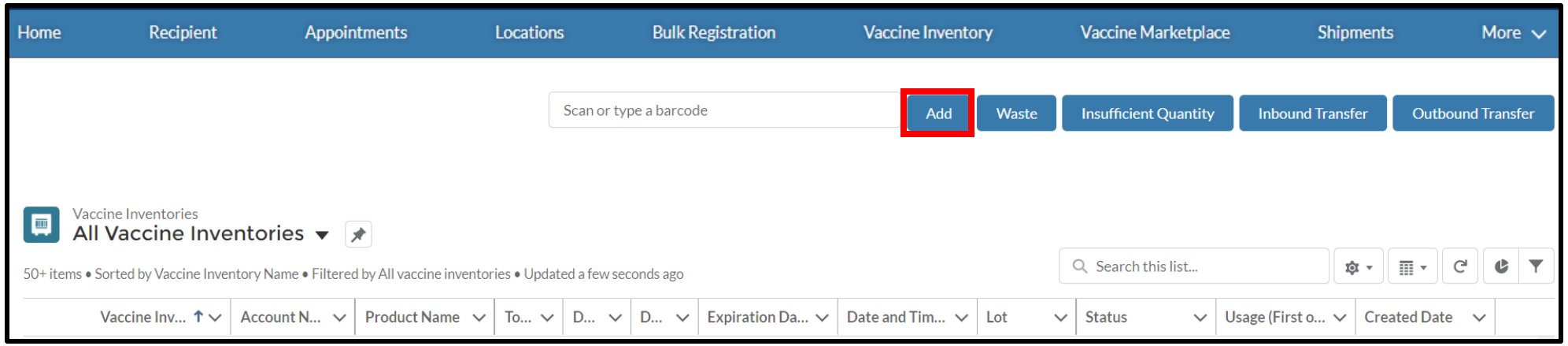
**Tips**

Before you receive a Federal Allocation, ensure the read only field **Able to Receive Federal Allocations?** checkbox is checked on your account record.

# Step 1 of 2: Navigate to the Vaccine Inventory Tab

To declare a new Vaccine Inventory record as a **Federal Allocation**:

1. Click **ADD** from the Vaccine Inventory Tab




## Audience

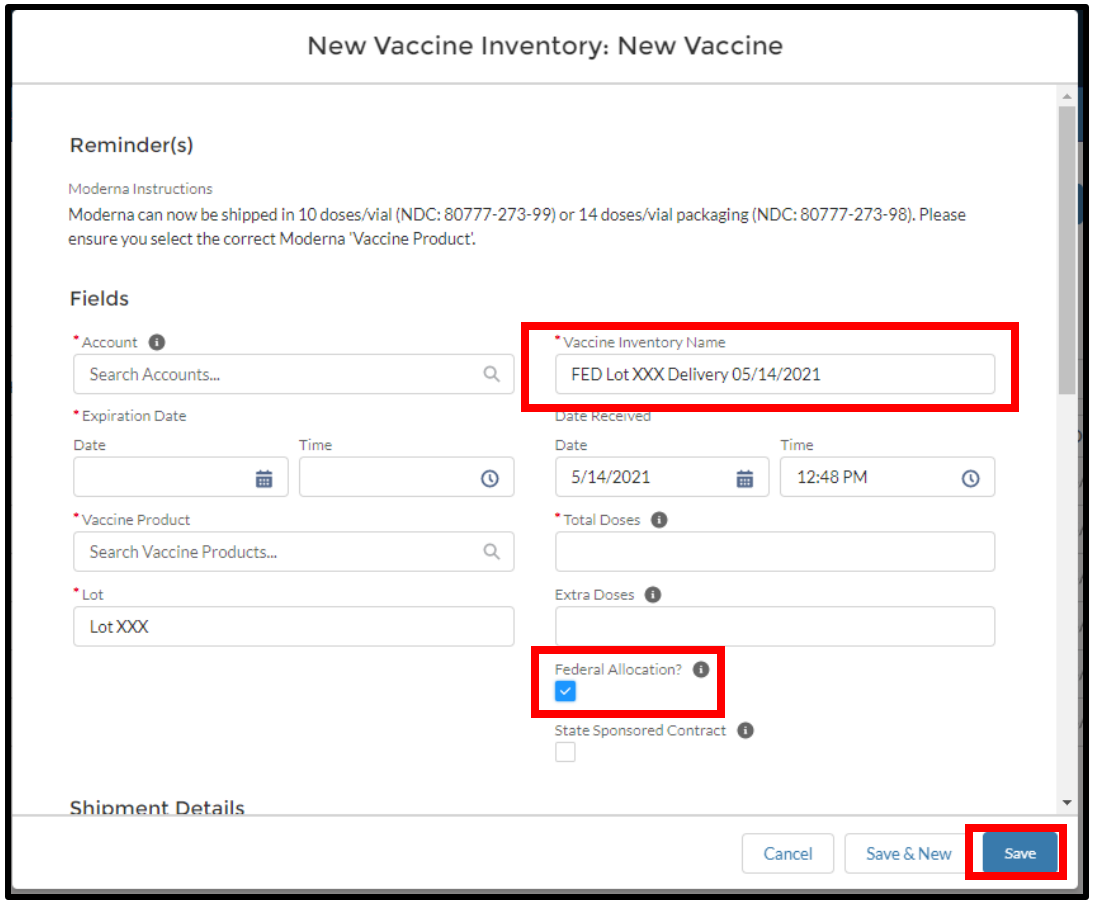
**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Step 2 of 2: Complete New Vaccine Inventory Record Form

1. Populate all required **VACCINE INVENTORY FIELDS**
2. Add the label **FED -** to the beginning of the *Vaccine Inventory name* so that it is easily identifiable.

   *Note:* This is a required labeling standard for ALL Federal Allocations (e.g., "FED – Delivery")
3. Check the **FEDERAL ALLOCATION?** Checkbox
4. Click **SAVE**




## Audience

**Healthcare Location Manager**

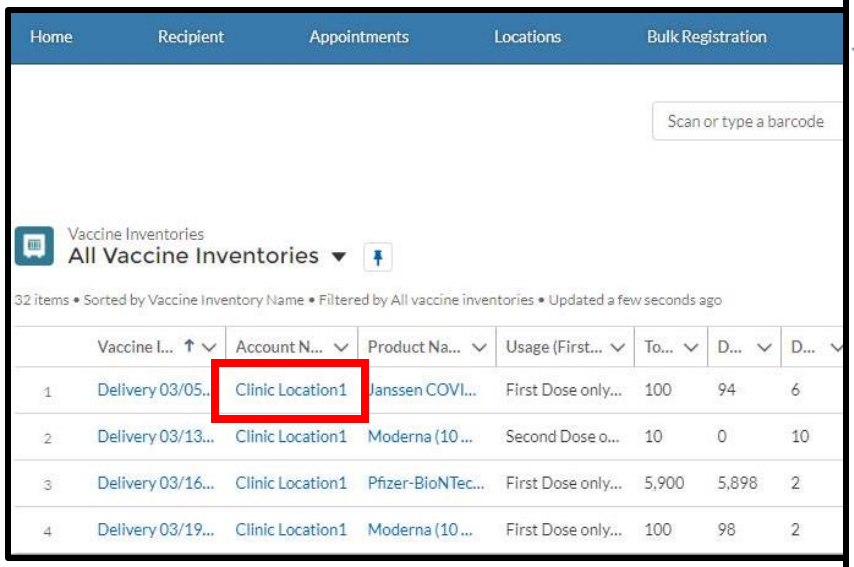
## Tips

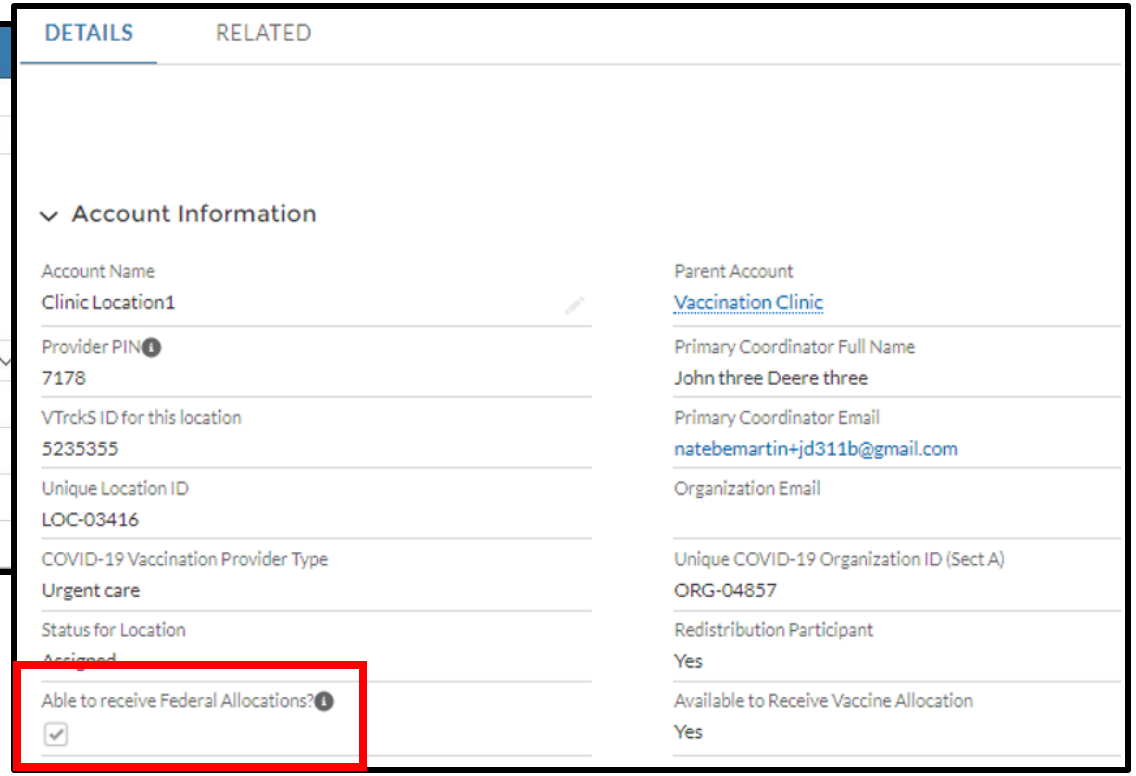
Remember that it is a best practice to always add the LOT NUMBER to all vaccine inventory names.

# How to Check if your Location is Set to Receive Federal Allocations

If you are unable to check the **FEDERAL ALLOCATION?** Checkbox from the vaccine inventory record, you may want to check if the **ABLE TO RECEIVE FEDERAL ALLOCATIONS?** checkbox is checked on your Account record.

1. Navigate to the **VACCINE INVENTORY** tab
2. Click on the Account Record associated with the receiving location
3. Ensure the **ABLE TO RECEIVE FEDERAL ALLOCATIONS?** checkbox is checked




## Audience

**Healthcare Location Manager**

## Tips

If the box is not checked, you will not be able to check the Federal Allocations check box on the Vaccine Inventory record. In the meantime, you can add "FED -" to the VACCINE INVENTORY NAME to communicate that it is a Federal Allocation.

To receive the Federal Allocation checkbox functionality, contact the CVMS Help Desk at https://ncgov.servicenowservices.com/csm_vaccine.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Receive State Sponsored Contract Inventories

# Receiving State Sponsored Contract Inventories

A **state sponsored contract inventory** is an inventory specifically earmarked for state sponsored vendor events. The intent of tagging a vaccine inventory as a State Sponsored Contract is to allow it to be used for traditionally marginalized and underserved communities, which primarily will allow it to be used for recipient's that need to be vaccinated in their homes. For most vaccine inventory records in CVMS, the State Sponsored Contract checkbox will be unchecked. If the state designates an inventory as a State Sponsored Contract, the following procedures should be followed.

**If the option to mark the inventory is not available, please contact the COVID-19 Vaccine Provider Help Desk (see slide 2 of this user guide for contact instructions).**

**Audience**

**Healthcare Location Manager**

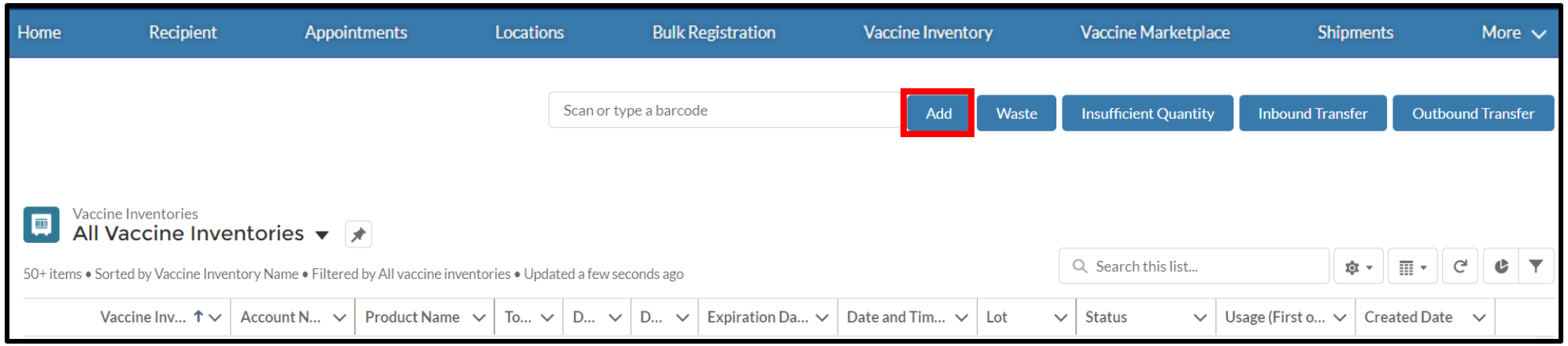
**Tips**

Though all vaccines are either state allocations or federal allocations, not all state allocations are for state sponsored contracts. If you are unsure if the inventory received is for a state sponsored contract, do NOT identify it in CVMS as a state sponsored contract.

# Step 1 of 2: Navigate to the Vaccine Inventory Tab

To declare a new Vaccine Inventory record as a **State Sponsored Contract**:

1. Click **ADD** from the Vaccine Inventory Tab




## Audience

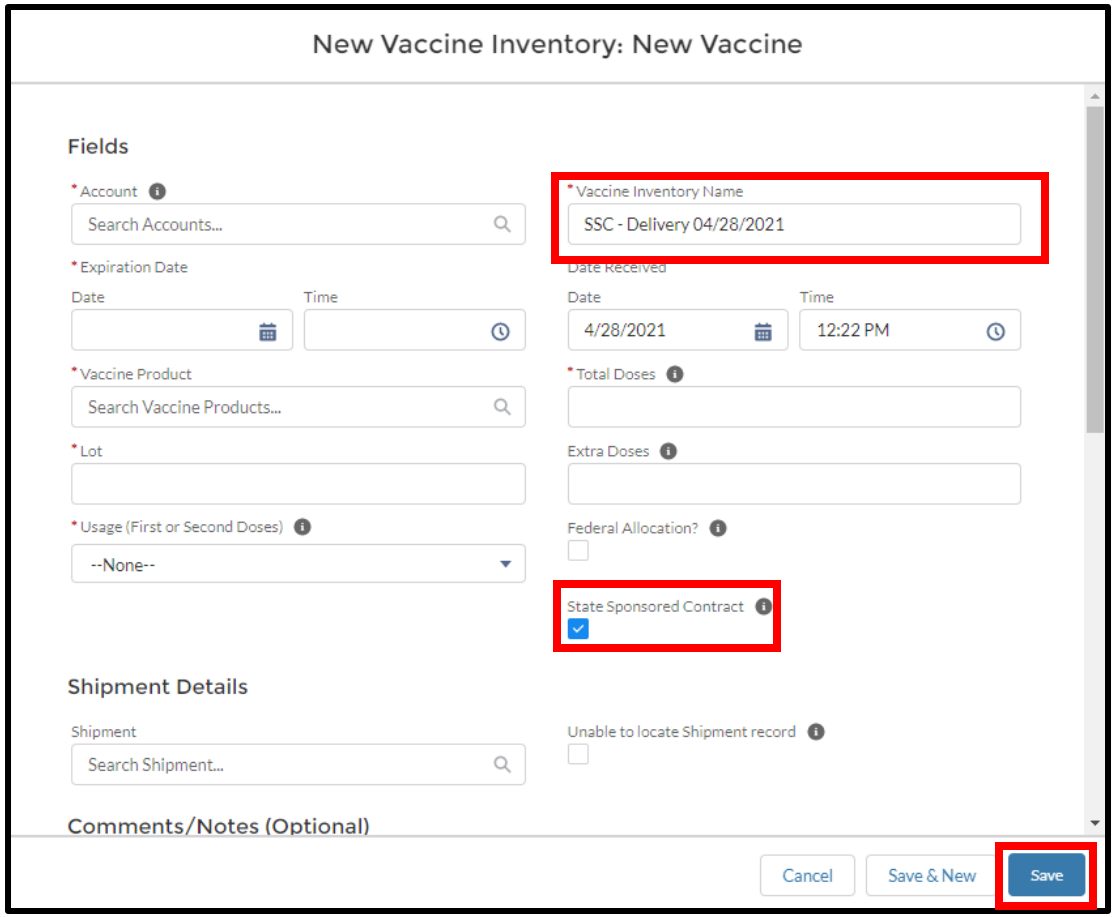
**Healthcare Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Step 2 of 2: Complete New Vaccine Inventory Record Form

1. Populate all required **VACCINE INVENTORY FIELDS**
2. Add the label **SSC -** to the beginning of the *Vaccine Inventory name* so that it is easily identifiable.

   *Note:* This is a required labeling standard for ALL State Sponsored Contracts (e.g., "SSC – Delivery")
3. Check the **STATE SPONSORED CONTRACT** Checkbox
4. Click **SAVE**




## Audience

**Healthcare Location Manager**

## Tips

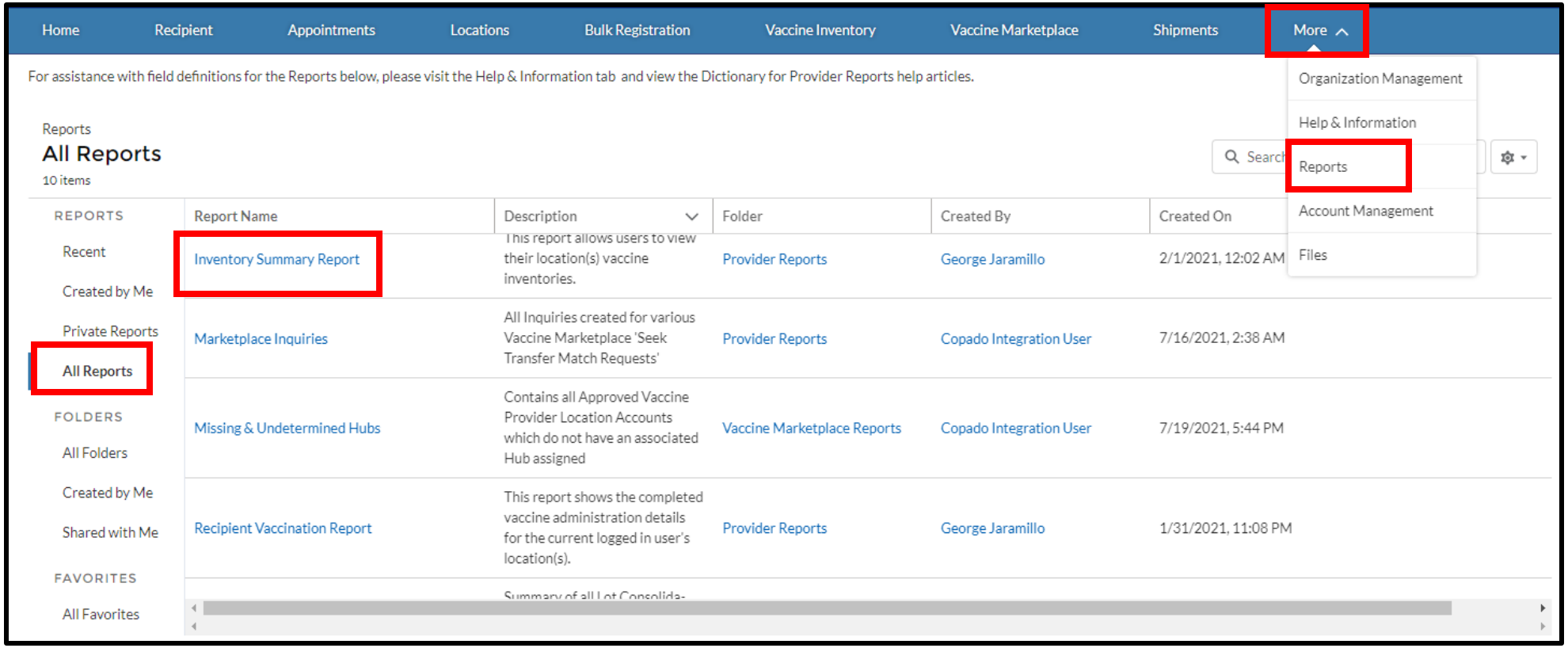
Remember that it is a best practice to always add the LOT NUMBER to all vaccine inventory names.

# Access the Inventory Summary Report

# Accessing the Inventory Summary Report

The Inventory Summary Report is available for you to view the status of all vaccine inventories in CVMS for all locations for which you are assigned as a Healthcare Location Manager.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **INVENTORY SUMMARY REPORT**




## Audience

**Healthcare Location Manager**

# Accessing the Inventory Summary Report (Continued)

NCDHHS
CVMS Provider Portal

Home | Recipient | Appointments | Locations | Bulk Registration | Vaccine Inventory | Vaccine Marketplace | Shipments | More

Report: Vaccine Inventory with Order and Shipment fields
**Inventory Summary Report**
This report allows users to view their location(s) vaccine inventories.

Add Chart | Export

| Total Records | Total Doses Available | Total Doses Administered | Total Doses Transferred | Total Doses Wasted | Total Doses Insufficient Quantity | Total Total Doses | Total Extra Doses |
|---|---|---|---|---|---|---|---|
| 66 | 35,423 | 50 | 4,132 | 385 | 57 | 39,338 | 709 |

| Account: Account Name | Vaccine Inventory Name | Lot | Product | NDC (Product) | Expiration Date | Date Received | Status | Doses Available |
|---|---|---|---|---|---|---|---|---|
| Solutions Loc1 (40) | Lot 432 Delivery 02/26/2021 | Lot 432 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 12/31/2021, 12:00 PM | 2/26/2021, 10:20 AM | Available | |
| | FED Lot 999 Delivery 03/03/2021 | Lot 999 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 12/31/2021, 12:00 PM | 3/3/2021, 10:24 AM | Available | |
| | # GFS Lot 456 - Delivery 02/19/2021 | 456 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 7/24/2021, 12:00 PM | 2/19/2021, 4:59 PM | Available | |
| | Lot 123 - Delivery 02/19/2021 | 123 | Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine | 59267-1000-02 | 8/13/2021, 12:00 PM | 2/19/2021, 4:57 PM | Available | |
| | FED Delivery 03/04/2021 Lot 4444 | 4444 | Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine | 59267-1000-02 | 3/31/2022, 12:00 PM | 3/4/2021, 4:05 PM | Available | |
| | Delivery 03/09/2021 | Mod123 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 9/30/2021, 12:00 PM | 3/9/2021, 9:32 AM | Available | |
| | Delivery 03/09/2021 | Lot UA 8975 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 12/31/2021, 12:00 PM | 3/9/2021, 12:00 PM | Available | |
| | Lot 555 Delivery 03/10/2021 | Lot 555 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 12/31/2021, 12:00 PM | 3/10/2021, 10:21 AM | Available | |
| | Lot 5432 Delivery 03/11/2021 2nd | Lot 5432 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 7/31/2021, 12:00 PM | 3/11/2021, 2:22 PM | Available | |
| | FED Delivery 03/05/2021 | 4444 | Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine | 59267-1000-02 | 12/31/2021, 12:00 PM | 3/5/2021, 12:38 PM | Available | |
| | Lot 6666666 Delivery 03/08/2021 | 6666666 | Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine | 59267-1000-02 | 10/7/2021, 12:00 PM | 3/8/2021, 2:52 PM | Available | |
| | Lot 789 Delivery 03/04/2021 | Lot 789 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 12/31/2021, 12:00 PM | 3/4/2021, 2:26 PM | Available | |
| | Delivery 03/01/2021 | 777 | Moderna (10 MDV) COVID-19 Vaccine | 80777-0273-99 | 5/6/2021, 12:00 PM | 3/1/2021, 1:54 PM | Available | |

Row Counts | Detail Rows | Subtotals | Grand Total

## Audience

**Healthcare Location Manager**

## Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal.

# Appendix

# Key Terms

| | |
|---|---|
| **Vaccine Inventory Shipment details** | Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC). |
| **Extra Doses** | Extra Doses are any additional doses that are administered beyond what the CDC considers standard doses per vial for the specific COVID-19 vaccine type. |
| **Redistribution** | Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement. |
| **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. |
| **Wastage** | Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed. |
| **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 is able to be administered to recipients. |

# 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 | 12/21/2020 | • Initial document | Azalea Troche |
| 2 | 1/10/2021 | • Updated shipment email notification<br>• New slides on List Views and Account (Location) Record<br>• Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Hep Desk Portal information<br>• Tips on adding inventories | 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. | Courtney Seward |
| 4 | 1/17/2021 | • Updated navigation bar.<br>• Updated the terms for Redistribution and Transfer | Azalea Troche & Courtney Seward |
| 5 | 1/21/2021 | • Added a tip<br>• Extra Doses<br>• Complete Vaccine Inventory | Courtney Seward & Linda Wade |
| 6 | 1/27/2021 | • Updated Navigation Bar screen shots to show reports tab | Kristin Clark |
| 7 | 2/4/2021 | • Updated CVMS Help Desk Portal Screenshot<br>• Updated Declare Vaccine Allocation Availability Section | Courtney Seward |
| 8 | 2/15/2021 | • Updated Vaccine Allocation Availability section<br>• Added Insufficient Quantity Definitions<br>• Added Insufficient Quantity Section<br>• Updated screenshots to match new branding | Tabitha McKelvy<br>Steve DiGangi<br>Nicholas Rinz |
| 9 | 3/2/2021 | • Updated wording for Jansen Vaccine<br>• Added federal allocation slide | Nicholas M. Rinz |
| 10 | 3/10/2021 | • Updated screenshots<br>• Federal Allocation for non-FQHC or FEMA sites<br>• Update Change Allocation Status tips and default status | Nicholas M. Rinz |

# User Guide Change Log (continued)

| Version | Date of Change | Changes Made | Author |
|---|---|---|---|
| 11 | 04/26/2021 | • Updated screenshot to include “Location” menu<br>• Added tip to do separate transfers for 1st and 2nd doses; 2nd dose should follow in approximately 3 weeks<br>• Updated Step 7 to include 1st or 2nd dose to reason; updated screenshot to show example<br>• Added continuation slide for Change Log<br>• New HCP Roles Report screenshot | Darrell Lee |
| 12 | 05/14/2021 | • Removed references to 1st and 2nd dose tagging<br>• Updated screenshots and addition of SSC<br>• Remove reference to Usage (1st/2nd dose) | Darrell Lee |
| 13 | 06/11/2021 | • Added Vaccine Marketplace to overview<br>• Updated screenshots to include Vaccine Marketplace tab<br>• Added Vaccine Marketplace Instructions<br>• Note added for Pfizer 6-dose not being eligible for extra doses | Darrell Lee |
| 14 | 07/01/2021 | • Introduced Hubs<br>• Added a step about contacting the Hub<br>• Added auto-update of available inventories<br>• Added Additional steps to check listings posted by the assigned hub<br>• Updated screenshots<br>• Added Finding Associated Hub<br>• Added the 3 rules that will make a listing auto-lapse<br>• Updated new wastage drop-down and added tip | Darrell Lee |
| 15 | 07/15/2021 | • Updated Hubs<br>• Added step for viewing inquiries<br>• Added step for Inactivation Reason<br>• Added step for Creating an Inquiry<br>• Added step for Inactivation Reason<br>• Added Edit Deprecation Event section | Darrell Lee |

# User Guide Change Log (continued)

| Version | Date of Change | Changes Made | Author |
|---|---|---|---|
| 16 | 07/26/2021 | • Merged 2 user guides in this new format<br>• 3-4: updated table of contents<br>• 127-133: Consolidate Available Doses from Multiple Vaccine Inventory Records in a Single Inventory<br>• 35-36, 68-69, 132-133, 143-145: Added slides for reports for individual sections | Vanessa Kemajou<br>Darrell Lee |