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

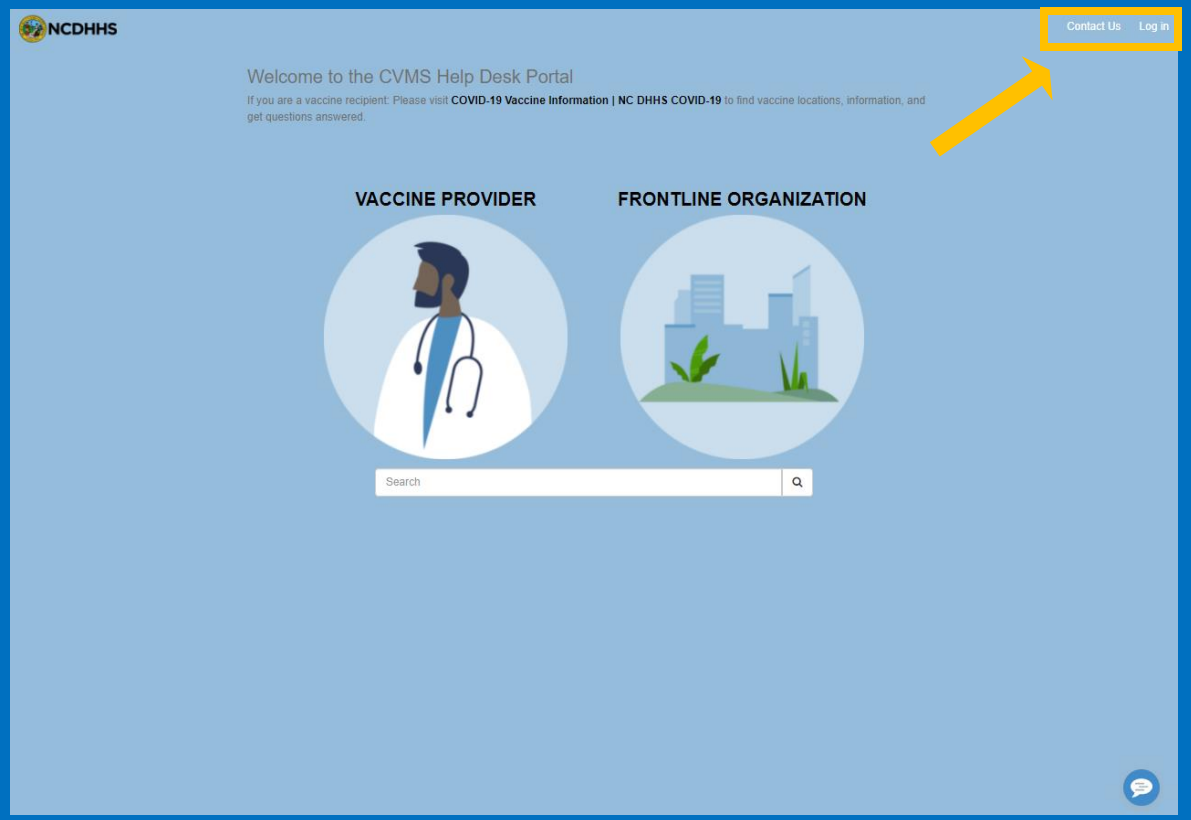
Step 5 - Navigate the CVMS Provider Portal

User Guide

Version 11

September 1, 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:

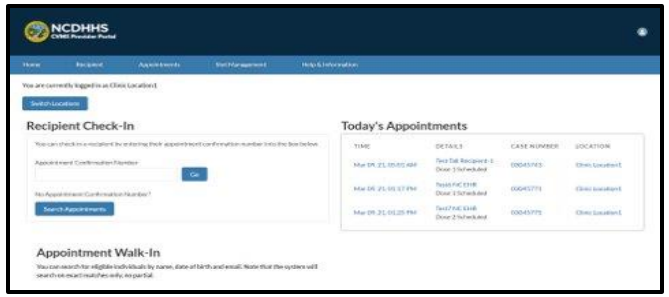
1. Register for an account by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

Table of Content

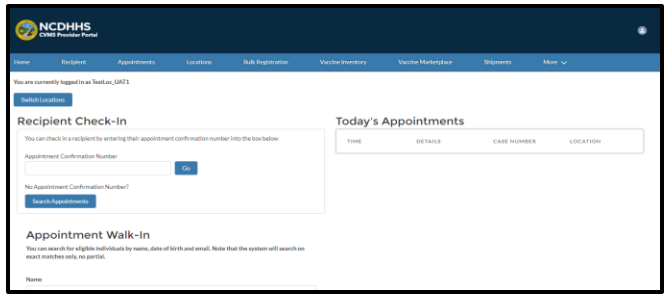
	Pages
Overview	**4 – 5**
Log in to the CVMS Provider Portal	**6 – 17**
How to Log in	7 – 10
How to Switch Locations (Users with Multiple Locations Only)	11 – 13
How to Access Additional Locations (Users with Statewide Location Manager Profile Only)	14 – 17
Navigate the CVMS Provider Portal	**18 – 31**
Use the Vaccine Virtual Agent	**32 – 35**
Accessing Reports (Users with a Location Manager Profile Only)	**36 – 58**
1 - Learn how to Filter and Format Reports	40 – 45
2 - Learn How to Export Reports	46 – 49
3 - Discover Available Reports	50 – 53
4 - Check Reports' Data Dictionaries in the Help & Information tab	54 – 58
Appendix	**59 – 63**
Next Steps	60 – 60

Overview

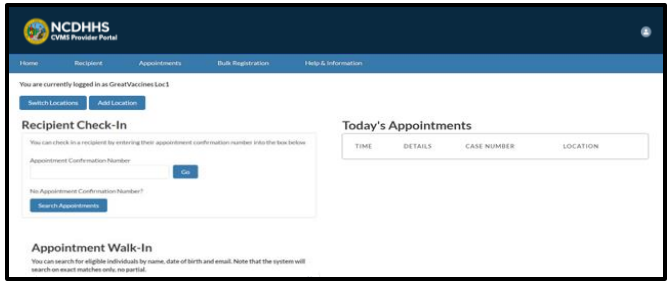
Overview



Healthcare Provider



Healthcare Location Manager



Statewide Location Manager

The CVMS Provider Portal allows Healthcare Providers in North Carolina to manage the administration of the COVID-19 vaccine. **The CVMS Provider Portal is different than the CVMS Provider Enrollment Portal, where Healthcare Providers enroll in the NC Vaccination Program and maintain their provider agreement.**

When logging in to the CVMS Provider Portal, be sure to have your **NCID USERNAME** and **NCID PASSWORD** available. *If you do not have an NCID username, refer to the Appendix for instructions on how to create one.*

The processes included in this training are for the **Healthcare Provider, Healthcare Location Manager, and Statewide Location Managers** profiles.

For **Statewide Location Managers,** all information for the Healthcare Provider profile will apply to the Statewide Location Manger profile. The '**Add A Healthcare Provider Location**' section is only for Statewide Location Managers.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Access the CVMS Provider Portal at https://covid-vaccine-provider-portal.ncdhhs.gov

Now, let's get started!

Log in to the CVMS Provider Portal

How to Log in

Enter NCID Username and NCID Password

1. Navigate to https://covid-vaccine-provider-portal.ncdhhs.gov
2. Click on the **NCID** button
3. Enter your **NCID username** and **NCID password**
4. Click **NCID LOGIN**
5. You are logged in to the CVMS Provider Portal

For guidance on obtaining an NCID, refer to the Appendix of this User Guide.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Your NCID username must be linked to your profile prior to your first log in. Contact your Healthcare Location Manager to request to be added to one or more locations set up in the CVMS Provider Portal.

Enter NCID Username and NCID Password

For users of the CVMS Provider Portal, there will be a confidentiality agreement that appears upon first/next log-in.

1. Read the statement

2. Click on **I AGREE**

Confidentiality Agreement

CVMS is a system of the State of North Carolina, Department of Health and Human Services (NC DHHS), Division of Public Health (DPH) that enables vaccine management and essential data sharing between vaccine administrators, providers, and public health officials, who have authorized and credentialed access to CVMS (Authorized Users). CVMS contains immunization records and other Protected Health Information (PHI), Personally Identifiable Information (PII), and other information confidential under state and federal law (Confidential Information). At all times, CVMS shall only be accessed by Authorized Users consistent with that user's job duties, responsibilities, and level of authorization, exclusively for legally-permitted uses, and only to the extent strictly necessary (Authorized Access). By clicking "[I Agree]" and proceeding further, you are acknowledging you understand and agree with the preceding statements. Additionally, by clicking "[I Agree]" and proceeding further, you understand and agree to abide by all of the following, including the consequences of any violations of: applicable state and federal confidentiality laws; applicable provisions of the NC DHHS Office of Privacy and Security Manual; and applicable provisions of the North Carolina Department of Information Technology (NCDIT) Statewide Information Security Policies. Unauthorized access or use of CVMS or Confidential Information violates the CVMS Terms of Use and Confidentiality agreement and could expose you or your organization to civil or criminal liability.

Users of this system have no expectation of privacy. This system and equipment are subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in the acquisition, recording, and analysis of all data being communicated, transmitted, processed, or stored in this system by a user. If monitoring reveals possible evidence of criminal activity, such evidence may be provided to Law Enforcement Personnel. Anyone using this system expressly consents to such monitoring.

Cancel | I Agree

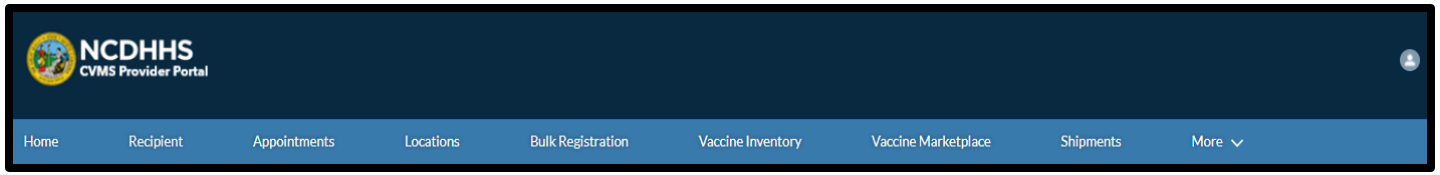
Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

View the CVMS Provider Portal Tabs

In the CVMS Provider Portal, TABS help you navigate between pages. The TABS you see are based on your user profile: Healthcare Location Manager, Healthcare Provider, or Statewide Location Manager.

1. Users with Healthcare Location Manager profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, LOCATIONS, BULK REGISTRATION, VACCINE INVENTORY, VACCINE MARKETPLACE, SHIPMENTS, ORGANIZATION MANAGEMENT, ACCOUNT MANAGEMENT, REPORTS,** and **HELP & INFORMATION**



2. Users with Healthcare Provider profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS,** and **HELP & INFORMATION**

3. Users with Statewide Location Manager profile have the tabs shown below**: HOME, RECIPIENT, APPOINTMENTS, BULK REGISTRATION,** and **HELP & INFORMATION**

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Learn more about managing your recipient's appointments in the **CVMS Provider Portal Recipient Check-In User Guide.**

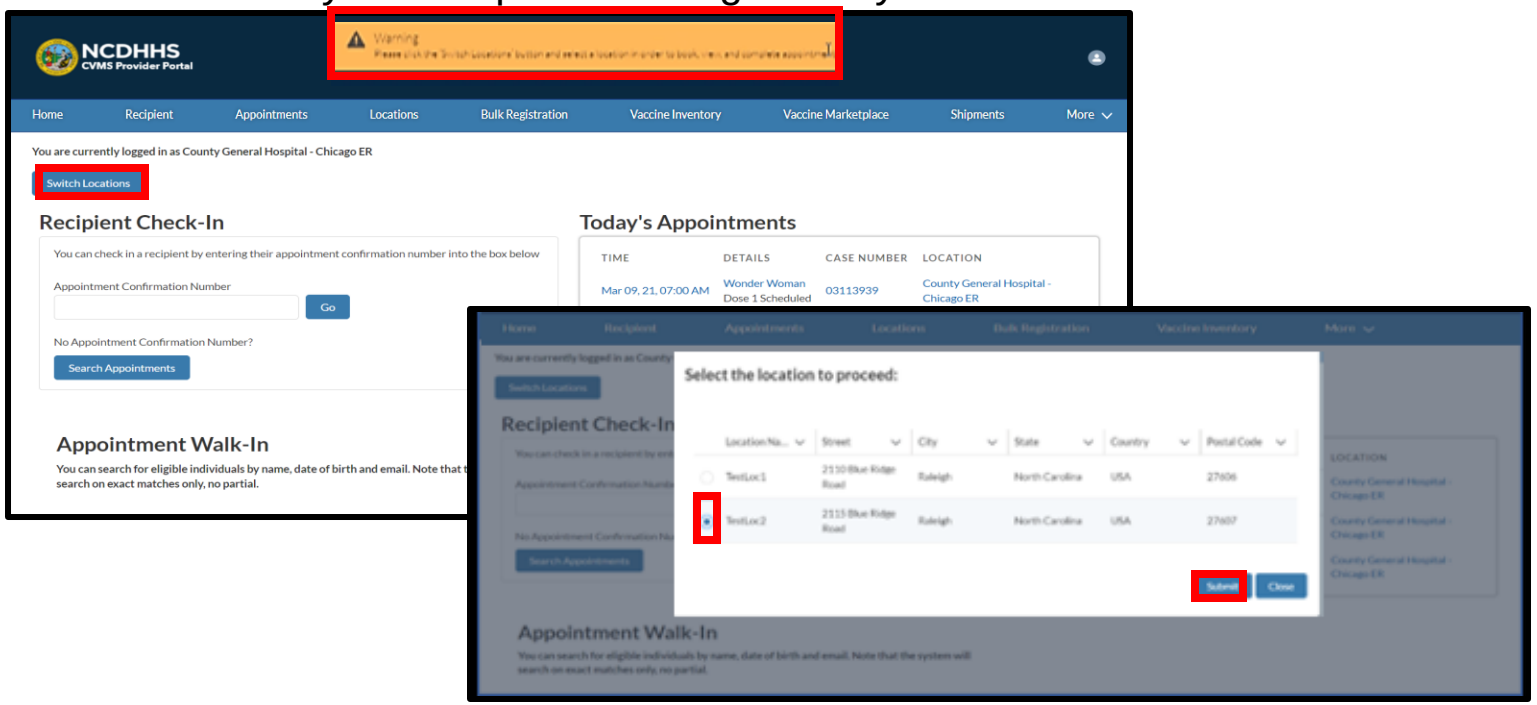
How to Switch Locations (Users with Multiple Locations Only)

Multi-Location Users Only: Select Location Using 'Switch Location' Before Proceeding

Users associated with multiple locations will have to select a location where you are operating from upon logging in to the CVMS Provider Portal.

When you log in to the CVMS Provider Portal, **please pay attention to the banner at the top of the Home page.** All of your operations in the Portal (e.g., booking appointments, logging vaccine administration) will be attributed to the location that you select. You **will not** be able to complete these task until you pick a location.

1. Click **SWITCH LOCATION**
2. Select the **LOCATION** where you will operate during the day



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

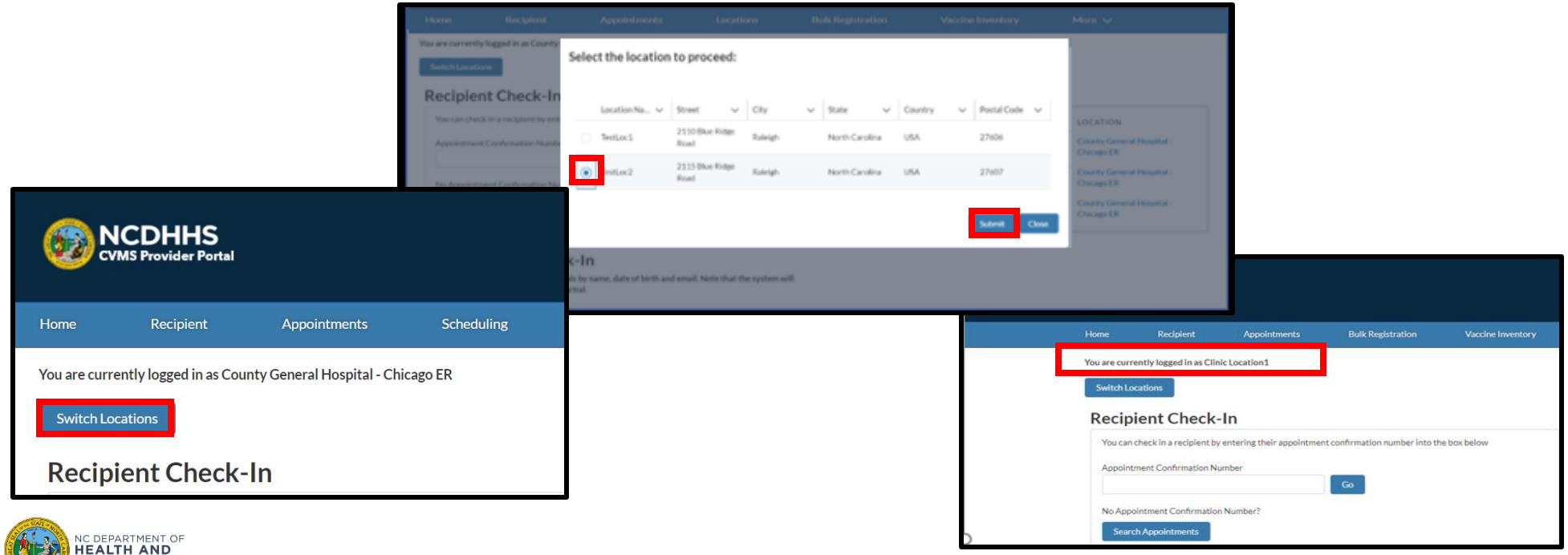
User associated with multiple locations will have to select a location they are operating from upon logging in to the CVMS Provider Portal.

If reconnecting after logging out, your location will have been erased and you will need to once again select the location where you are operating from.

Logging In to Another Location (if necessary)

At any time, you can switch to another location if you need to support another location by using the **SWITCH LOCATIONS** button.

1. Click on the **SWITCH LOCATIONS** button
2. Select the appropriate location from the list that appears and click **SUBMIT**
3. **Please always confirm that your location was switched to the location of your choice** by checking the location name displayed at the top of the **HOME** page



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Your NCID must be associated to multiple locations to use this functionality. If you are only associated to one location, you will not be able to switch to another location.

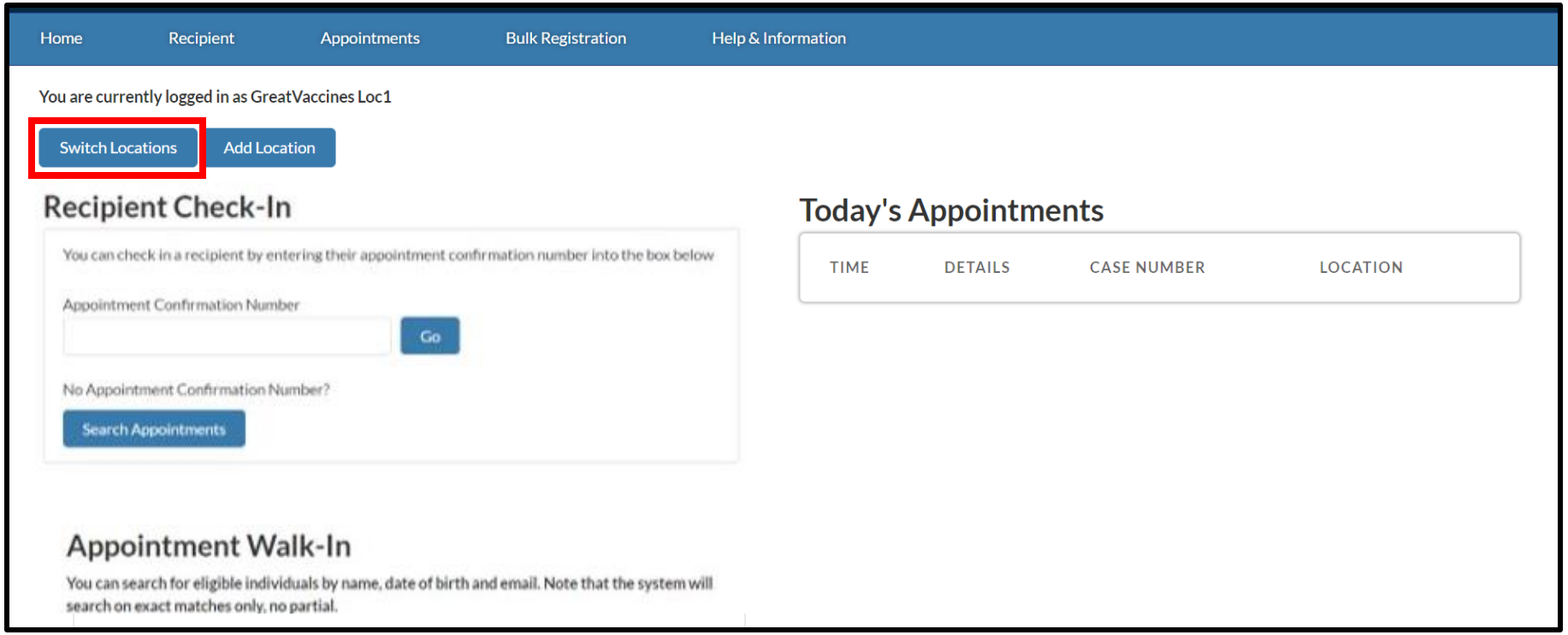
If you have a Statewide Location Manager profile, please read **Statewide Location Manager Profile: Add a Healthcare Provider Location** at the end of this User Guide.

How to Access Additional Locations (Users with Statewide Location Manager Profile Only)

Step 1 of 3: Click on ADD LOCATION

If you are a Statewide Location Manager, you can add new locations to the list of locations for you to select you are operating from by clicking the **ADD LOCATION** button.

1. Click on the **ADD LOCATION** button



Audience

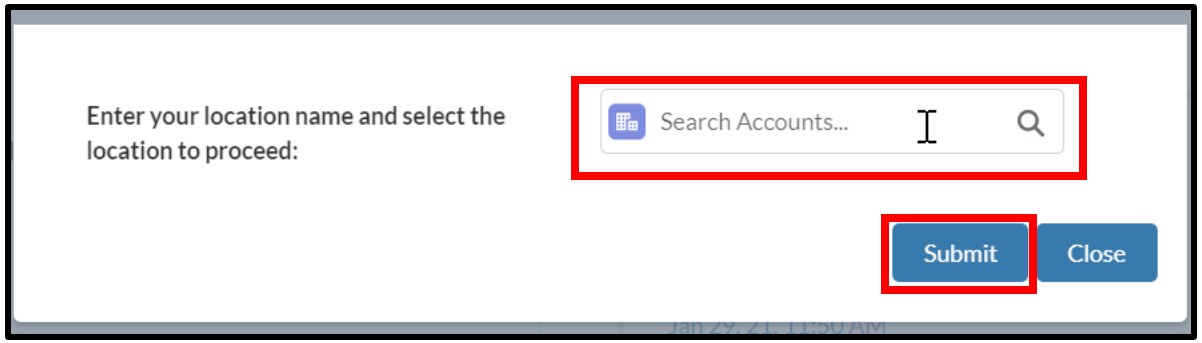
Statewide Location Manager

Tips

Learn more about it in the Statewide Location Manager Profile - Switch Location Job Aid at https://covid19.ncdhhs.gov/cvms-statewide-location-manager-profile-switch-location-job-aid/download.

Step 2 of 3: Search and select the location

1. Search for the location name you wish to add (type the first 3 letters to display the list of locations that starts with that 3 letters)
2. Click on the name of the location you wish to add in the list of search results
3. Click **SUBMIT**

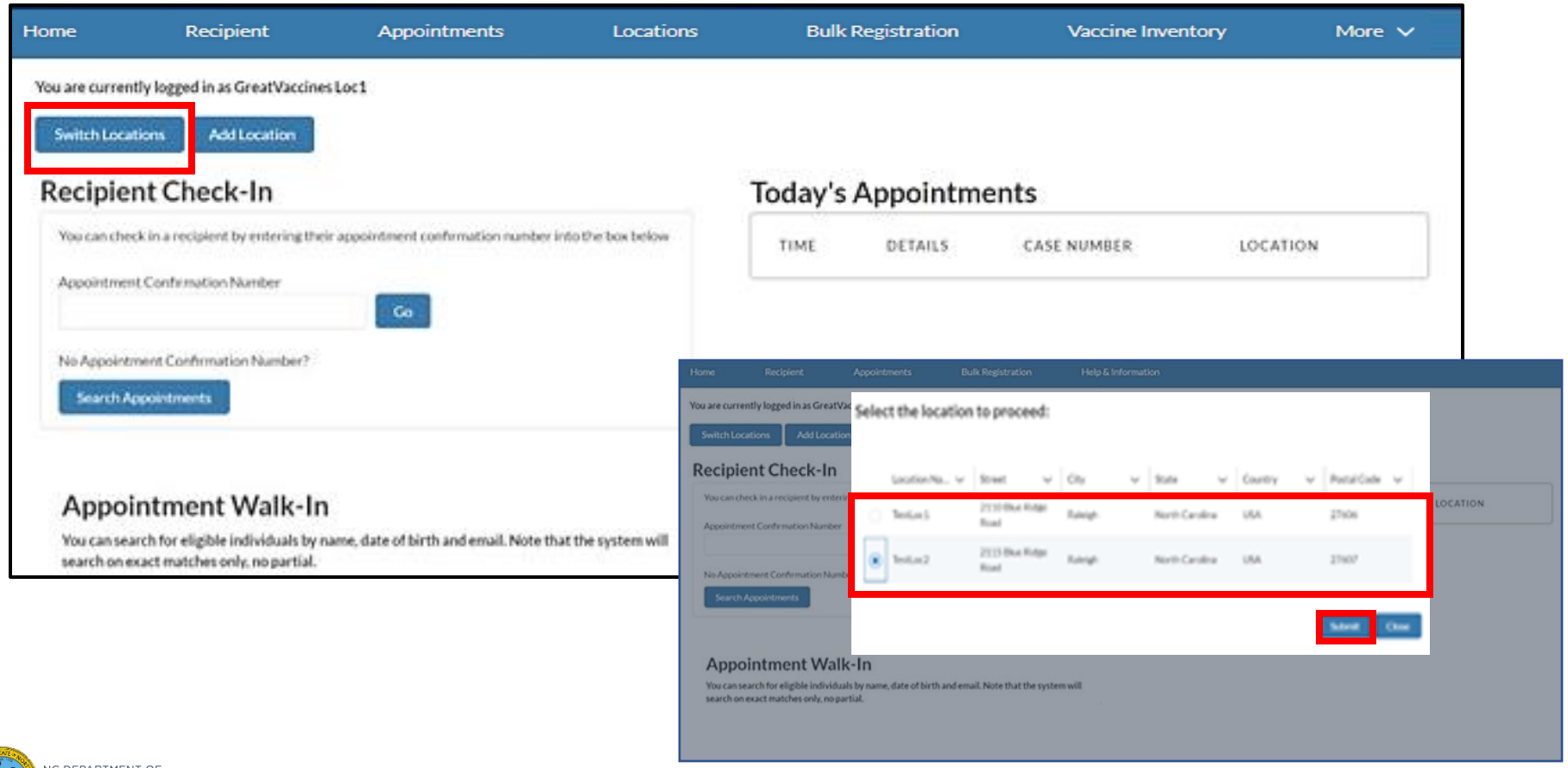


Audience

Statewide Location Manager

Step 3 of 3: Switch to the newly added location

1. Click on the **SWITCH LOCATIONS** button
2. Select the newly added location you wish to login in as
3. Click **SUBMIT**



Audience

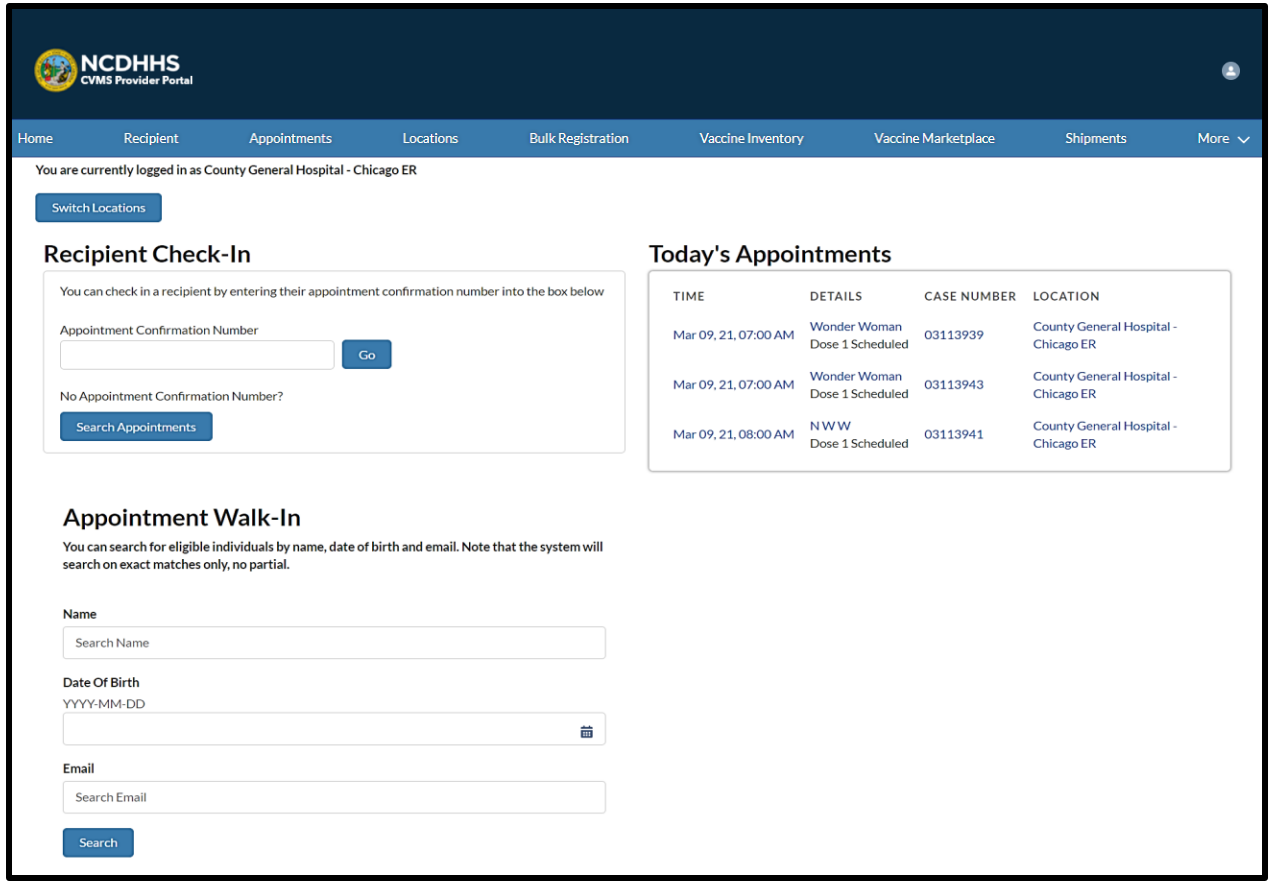
Statewide Location Manager

Navigate the CVMS Provider Portal

Step 1 of 13: View the CVMS Provider Portal Homepage

On the left side of the Homepage, you see **APPOINTMENT WALK-IN**, and on the right-side **TODAY'S APPOINTMENTS**.

Please note that the Date of Birth will be displayed as follows: Year – Month – Day.



Audience

Healthcare Provider

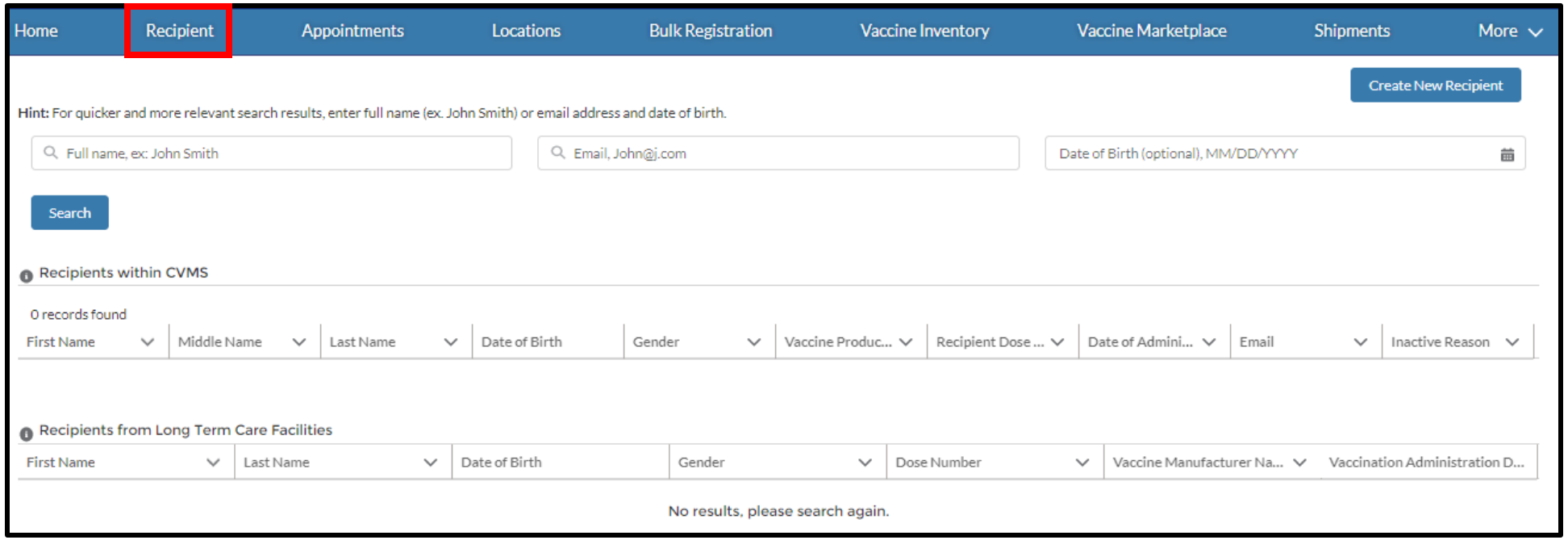
Healthcare Location Manager

Statewide Location Manager

Tips

If inactive for 2 hours, the session will expire, and you will have to sign back into the CVMS Provider Portal. **If you are timed out, you will need to start your current action over, as the system will not save where you left off.**

Step 2 of 13: Recipient Tab Overview



The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal.

Your search results will also include in the lower section any records of a recipient who received a COVID-19 vaccine dose from a Federal Long-Term Care Facility Program partner (e.g., CVMS, Walgreens) or from a Federal Retail Pharmacy partner (e.g., CVS, Walgreens).

Audience

Healthcare Provider

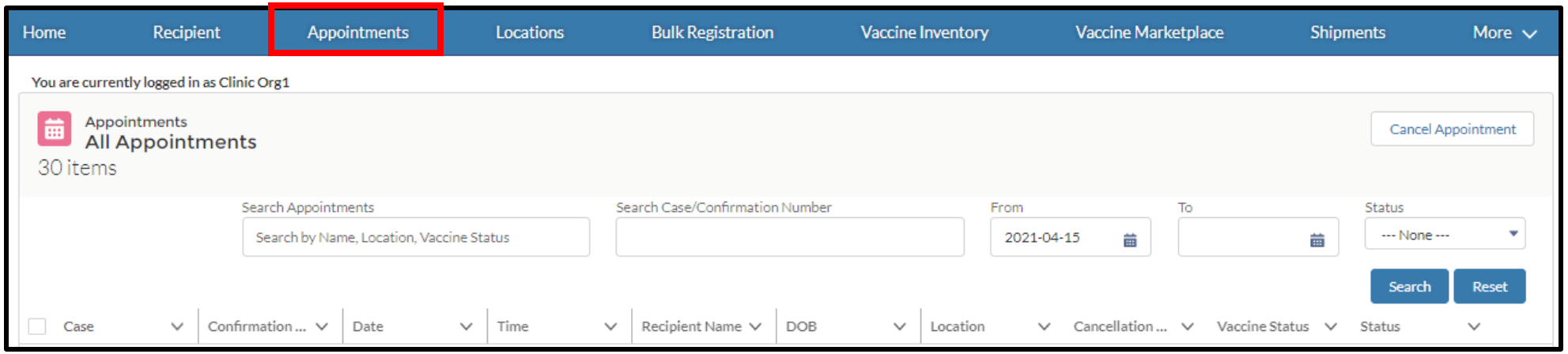
Healthcare Location Manager

Statewide Location Manager

Tips

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Point of Care User Guide** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers.

Step 3 of 13: Appointments Tab Overview



The **APPOINTMENTS** tab shows a list of appointments in CVMS Provider Portal.

Click the Case Number to view appointment information. You can search appointments by Name, Location, Confirmation Code, Vaccine Status, or Date.

If your location has enabled the scheduling feature in CVMS, this is the tab where you will check-in recipients that scheduled an appointment, cancel an appointment, or schedule a second-dose appointment.

Audience

Healthcare Provider

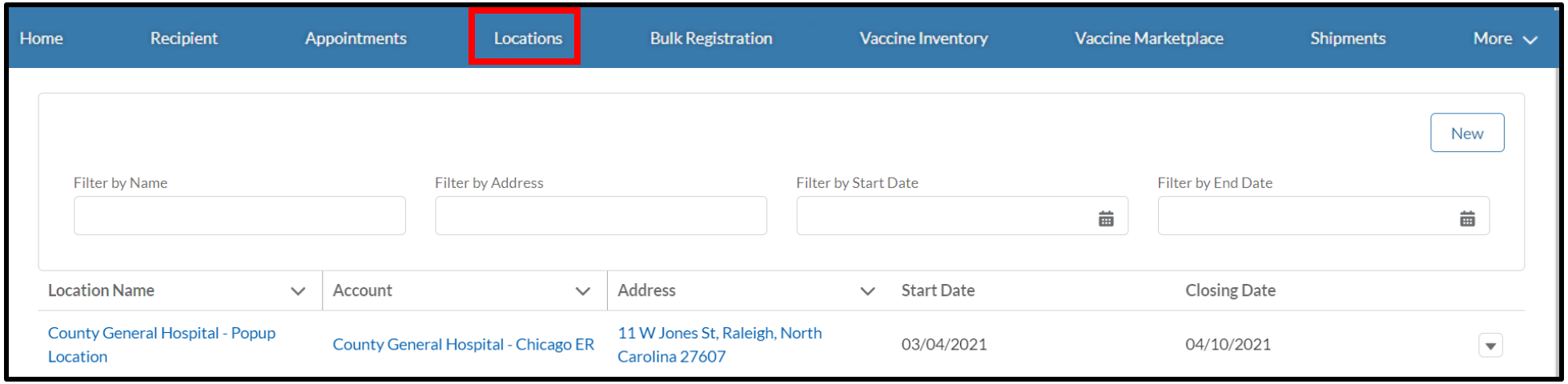
Healthcare Location Manager

Statewide Location Manager

Tips

The appointments tab will default to show you appointments that are scheduled for the same day for the location you are logged in under.

Step 4 of 13: Locations Tab Overview



The **LOCATIONS** tab can be used to list your location's details on the Vaccine Site Locator website (https://vaccines.gov), and to share your scheduling website to recipients. You can also create additional locations to list on the Vaccine Site Locator website (e.g., a community vaccination event covered by your location). If your location elects to use the scheduling feature in CVMS, your location record links to the scheduling feature in CVMS so that recipients can use CVMS to book appointments at your location.

Note: This tab will only be available if you have the Healthcare Location Manager profile.

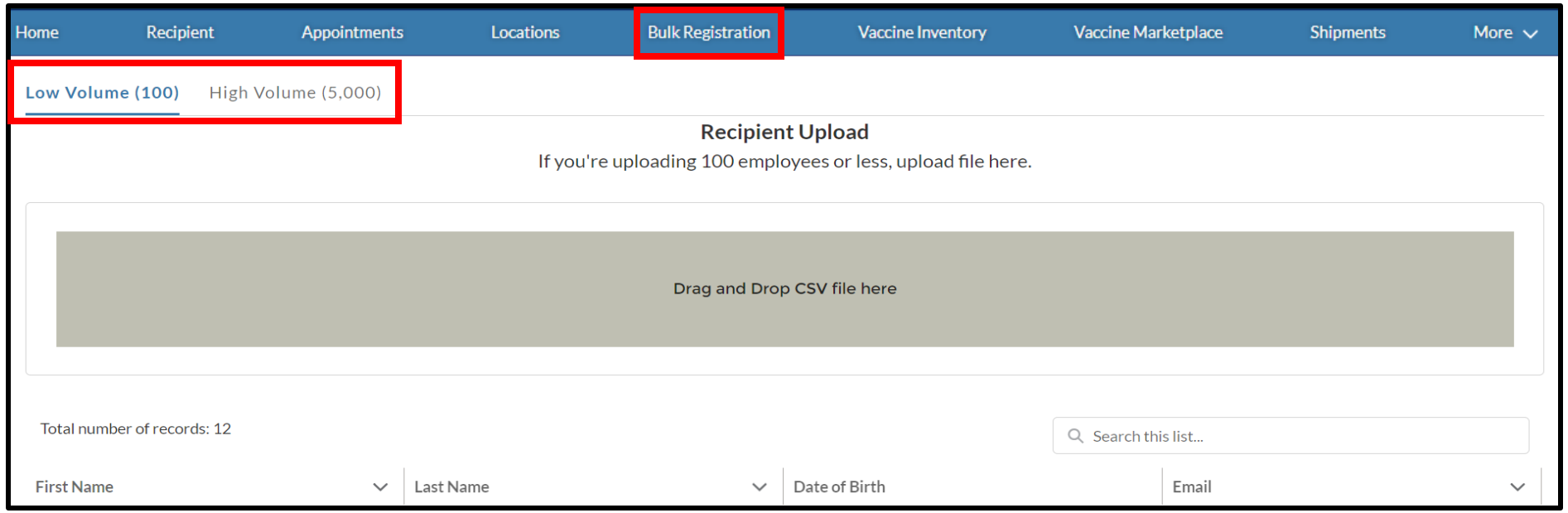
Audience

Healthcare Location Manager

Tips

Learn more about using the scheduling feature in CVMS to manage appointments in the **CVMS Provider Portal Managing Vaccine Site Locator at** https://covid19.ncdhhs.gov/how-add-edit-and-remove-your-location-vaccine-site-locator-website-user-guide/download **and Appointment Scheduling User Guide** at https://covid19.ncdhhs.gov/cvms-provider-portal-manage-appointment-scheduling-user-guide/download.

Step 5 of 13: Bulk Registration Tab Overview



The **BULK REGISTRATION** tab allows you to upload a list of recipients and generate their invitation to register in the COVID-19 Vaccine Portal to receive a COVID-19 vaccine.

Audience

Healthcare Location Manager

Statewide Location Manager

Tips

Learn more about uploading your eligible employees or individuals to invite them to register for the COVID-19 vaccine in the **CVMS Provider Portal Recipient Bulk Upload User Guide** at https://covid19.ncdhhs.gov/cvms-provider-portal-recipient-bulk-upload-user-guide-1/download.

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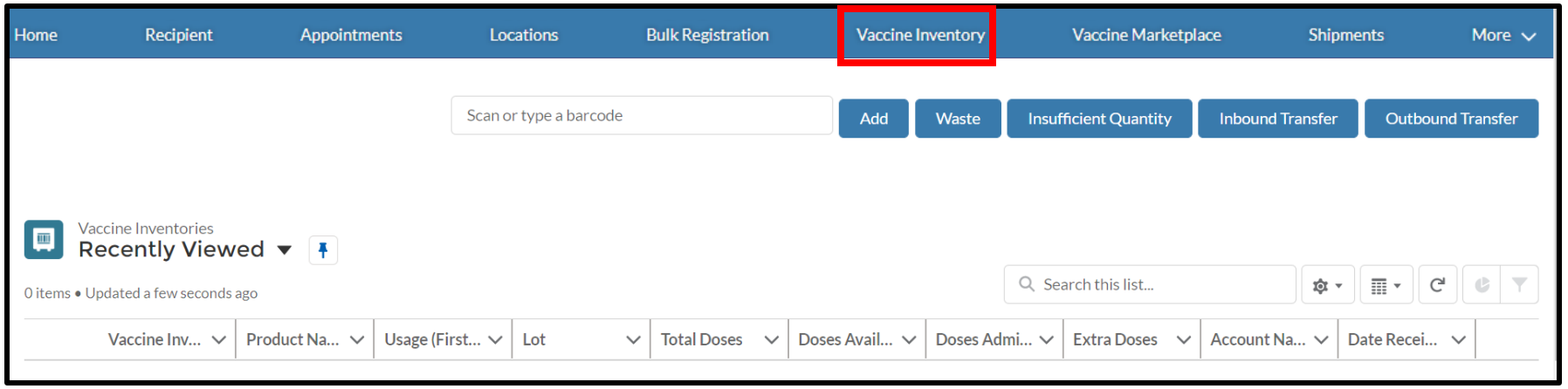
Step 6 of 13: Vaccine Inventory Tab Overview



The **VACCINE INVENTORY** tab is used to manage your COVID-19 vaccine inventory.

1. To pin a list view, click . The pinned list view will then load as the default list view.
2. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record (alphanumerically) or its last (Down Sort icon).
3. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

Note: This tab will only be available if you have the Healthcare Location Manager profile.

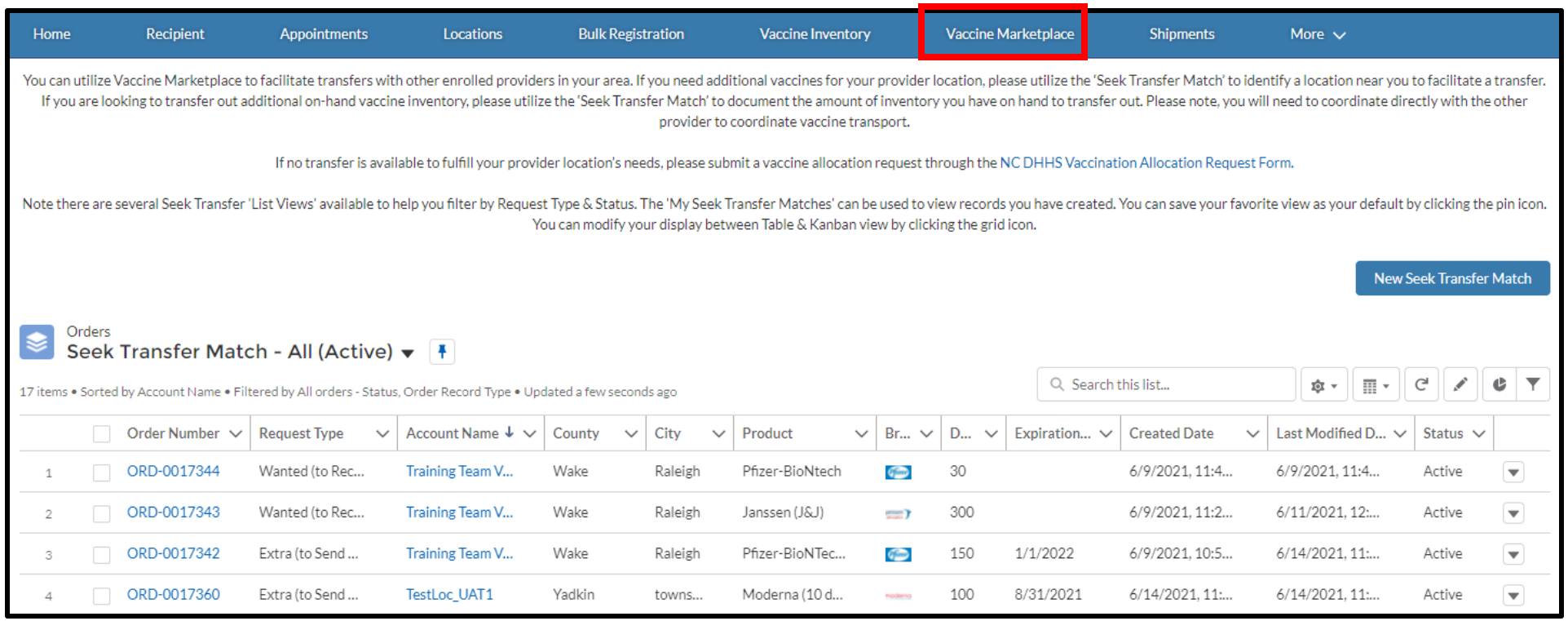
Audience

Healthcare Location Manager

Tips

Learn more about managing your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving and Processing Vaccine Shipments User Guide** at https://covid19.ncdhhs.gov/receiving-and-processing-vaccine-shipments-user-guide/download and in the **CVMS Provider Portal Vaccine Inventory Deprecation, Transfer and Redistribution User Guide** at https://covid19.ncdhhs.gov/cvms-provider-portal-inventory-deprecation-transfer-and-redistribution-user-guide/download.

Step 7 of 13: Vaccine Marketplace Tab Overview



1. The **VACCINE MARKETPLACE** tab allows Healthcare Location Managers to directly communicate and collaborate to arrange for the transfer of vaccine inventory from site to site
2. Healthcare Location Managers can seek matches, place wanted transfers, and place extra transfers.

Note: This tab will only be available you have the Healthcare Location Manager profile.

Audience

Healthcare Location Manager

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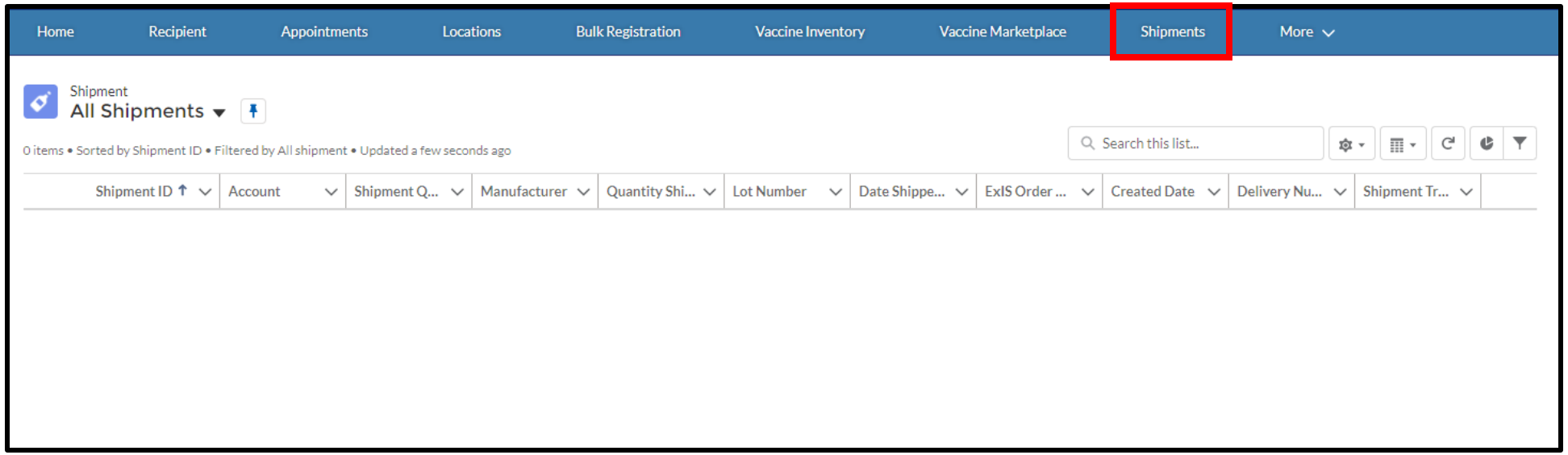
Step 8 of 13: Shipments Tab Overview



1. The **SHIPMENTS** tab allows you to see your location's COVID-19 vaccine shipment information
2. To pin a list view, click . The pinned list view will then load as the default list view.
3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record (alphanumerically) or its last (Down Sort icon).
4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

Note: This tab will only be available you have the Healthcare Location Manager profile.

Audience

Healthcare Location Manager

Tips

Learn more about administrating your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving & Processing Vaccine Inventory Shipments User Guide** at https://covid19.ncdhhs.gov/receiving-and-processing-vaccine-shipments-user-guide/download.

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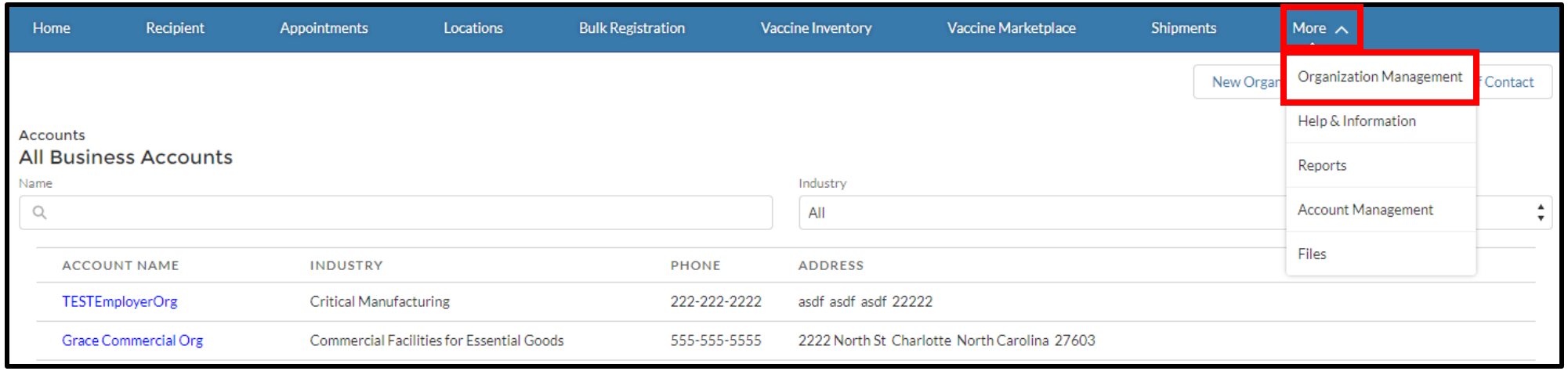
Step 9 of 13: Organization Management Tab Overview



The **ORGANIZATION MANAGEMENT** tab allows you to invite essential workers' organizations to connect to CVMS. Once invited, these organizations can access the CVMS Organization Portal where they will be allowed to upload their list of eligible recipients. These recipients will then be able to register in the COVID-19 Vaccine Portal, saving time when they go to receive their first dose of the COVID-19 vaccine.

Audience

Healthcare Location Manager

Tips

Learn more about Organization management in the **CVMS Provider Portal Organization Management User Guide** at https://covid19.ncdhhs.gov/media/2391/download.

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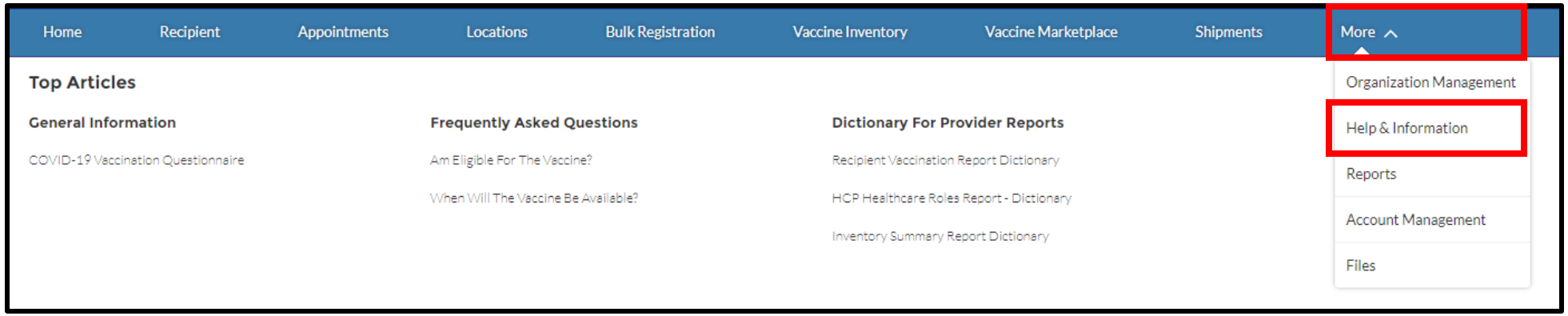
Step 10 of 13: Help and Information Tab Overview



The **HELP & INFORMATION** tab allows you to see Frequently Asked Questions and General Information about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccine Registration Form.

Audience

Healthcare Location Manager

Statewide Location Manager

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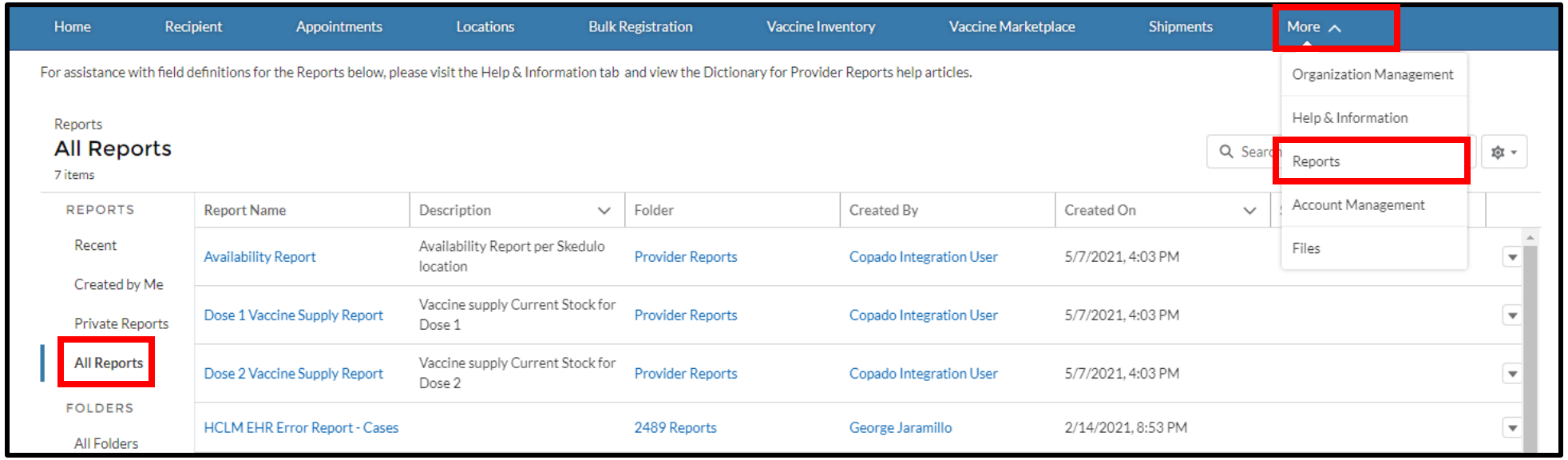
Step 11 of 13: Report Tab Overview



The **REPORTS** tab is used to access your COVID-19 vaccine reports. Click on **ALL REPORTS** to access the prepackaged reports available to you.

Note: This tab will only be available if you have the Healthcare Location Manager profile.

Audience

Healthcare Location Manager

Tips

Learn more about reporting in the **CVMS Provider Portal Reports User Guide** at https://covid19.ncdhhs.gov/cvms-provider-portal-reports-user-guide-2/download.

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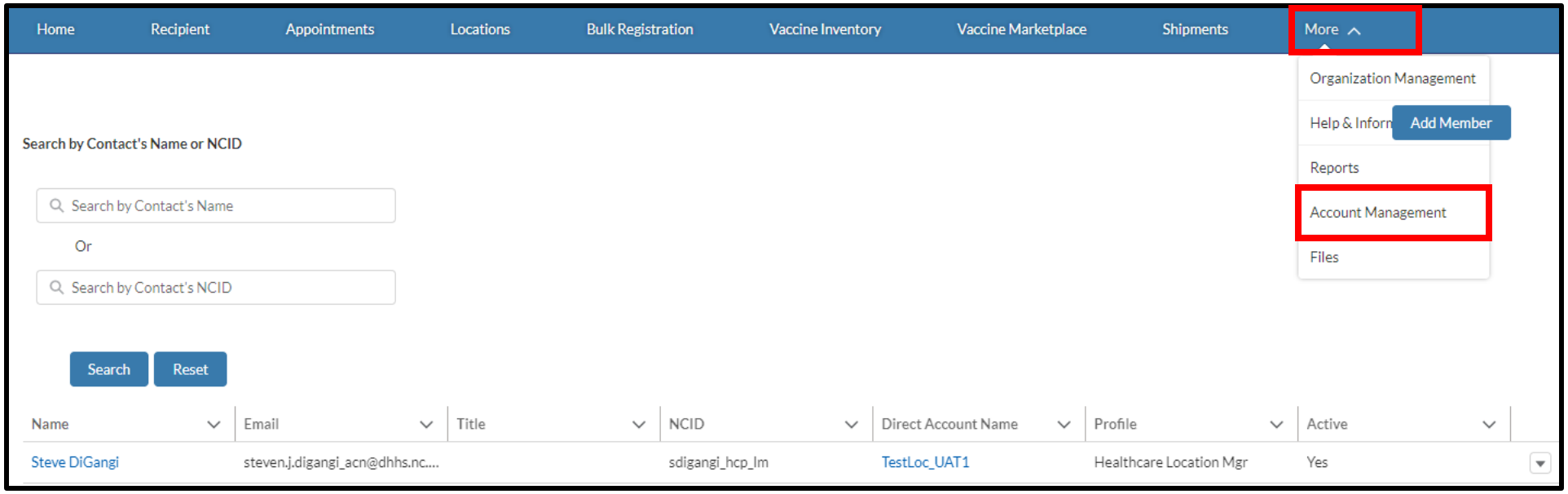
Step 12 of 13: Account Management Tab Overview



The **ACCOUNT MANAGEMENT** tab allows you to create user accounts. You can enter their NCID username and expected role for the location you are logged in under.

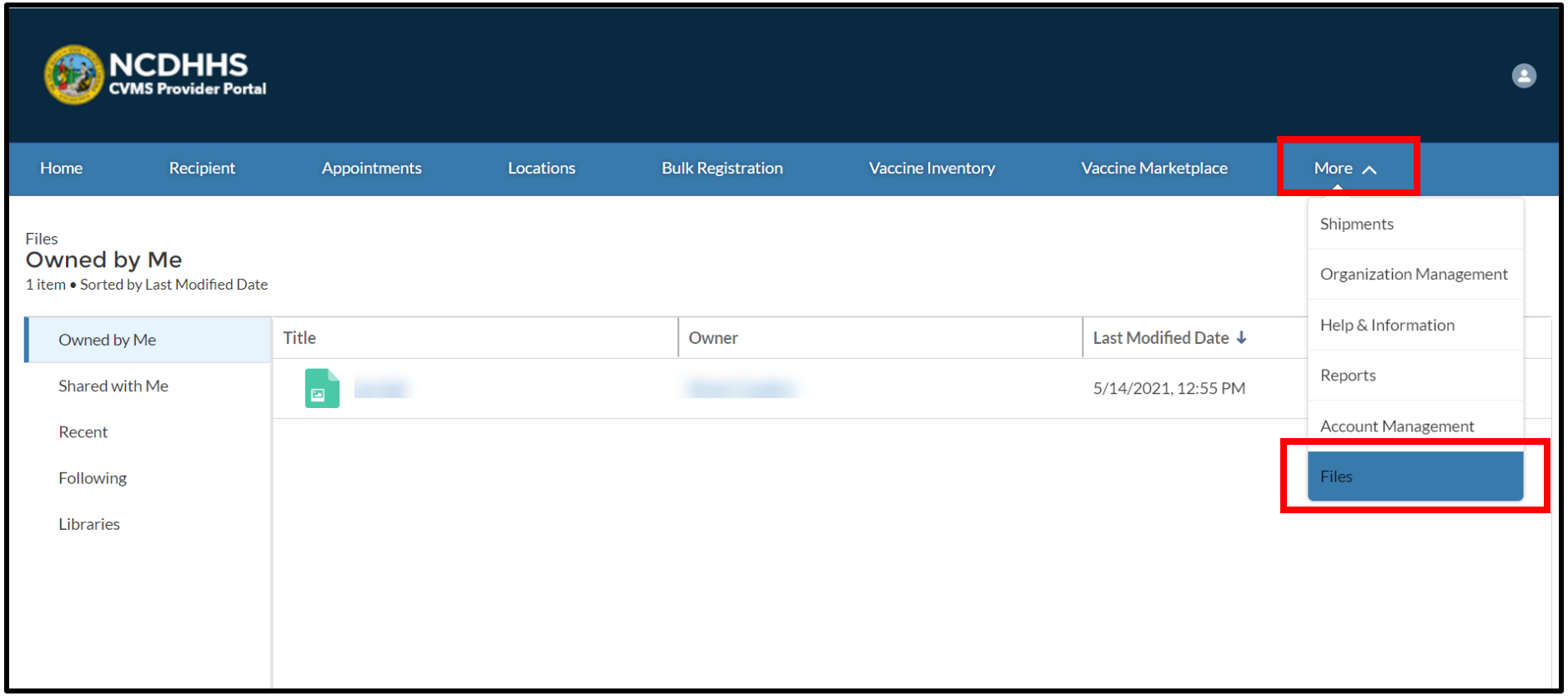
Audience

Healthcare Location Manager

Tips

Learn more about Account Management in the **CVMS Provider Portal User Account Management User Guide** at https://covid19.ncdhhs.gov/media/2368/download.

Step 13 of 13: Files Tab Overview



The **FILES** tab allows certain Healthcare Location Managers to receive customized report files from the CVMS team.

Note: Most users will not have access to this feature.

Audience

Healthcare Location Manager

Tips

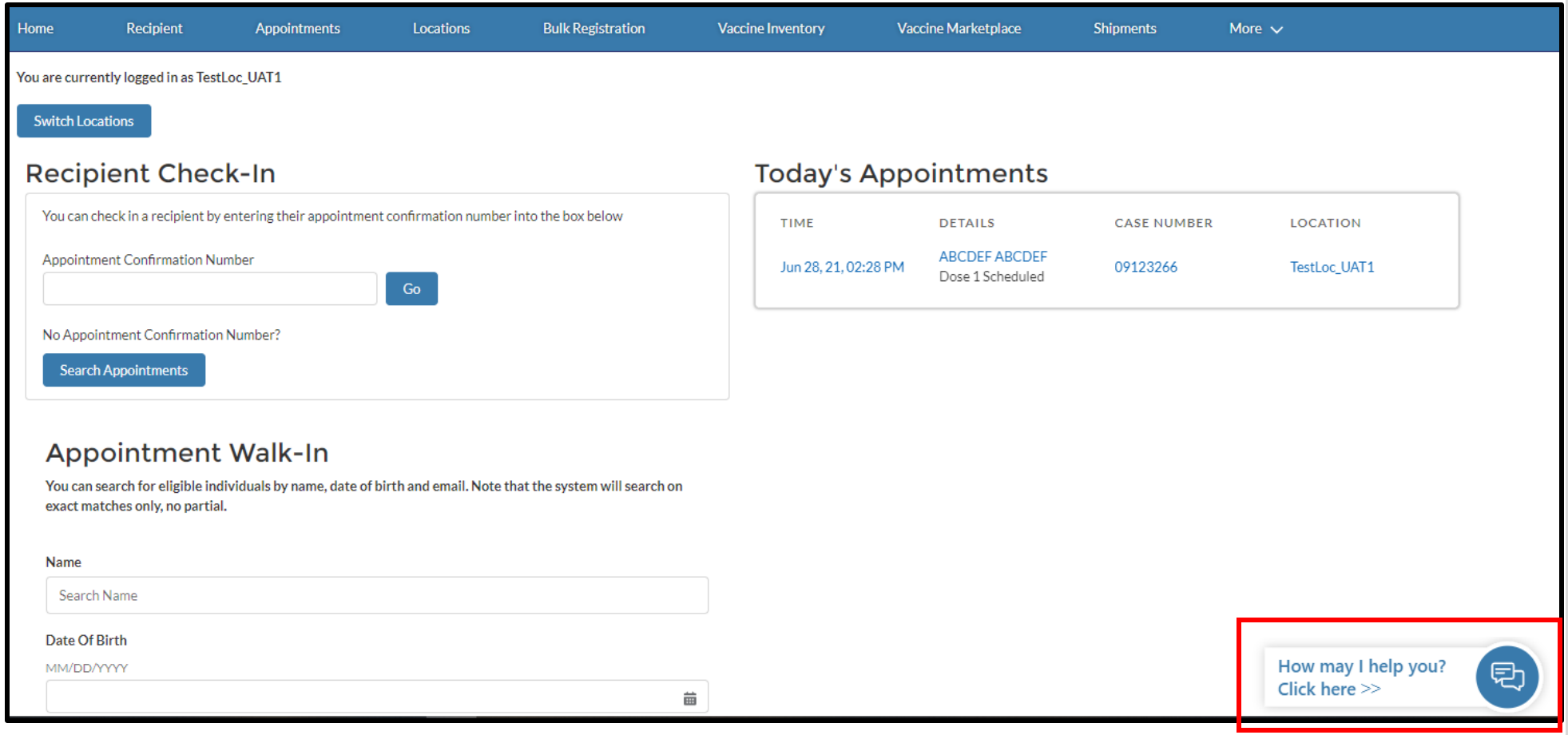
Learn more about the Files tab in the **CVMS Provider Portal - Access Custom Reports in Files Tab Job Aid** at https://covid19.ncdhhs.gov/vaccines/providers/cvms-user-guides-recorded-trainings-and-upcoming-trainings.

Use the Vaccine Virtual Agent

Launching the Vaccine Virtual Agent

The CVMS Provider Portal includes an automated virtual agent to help answer common questions about system use and functionality.

1. From the home screen, click on the **VIRTUAL AGENT ICON** to launch



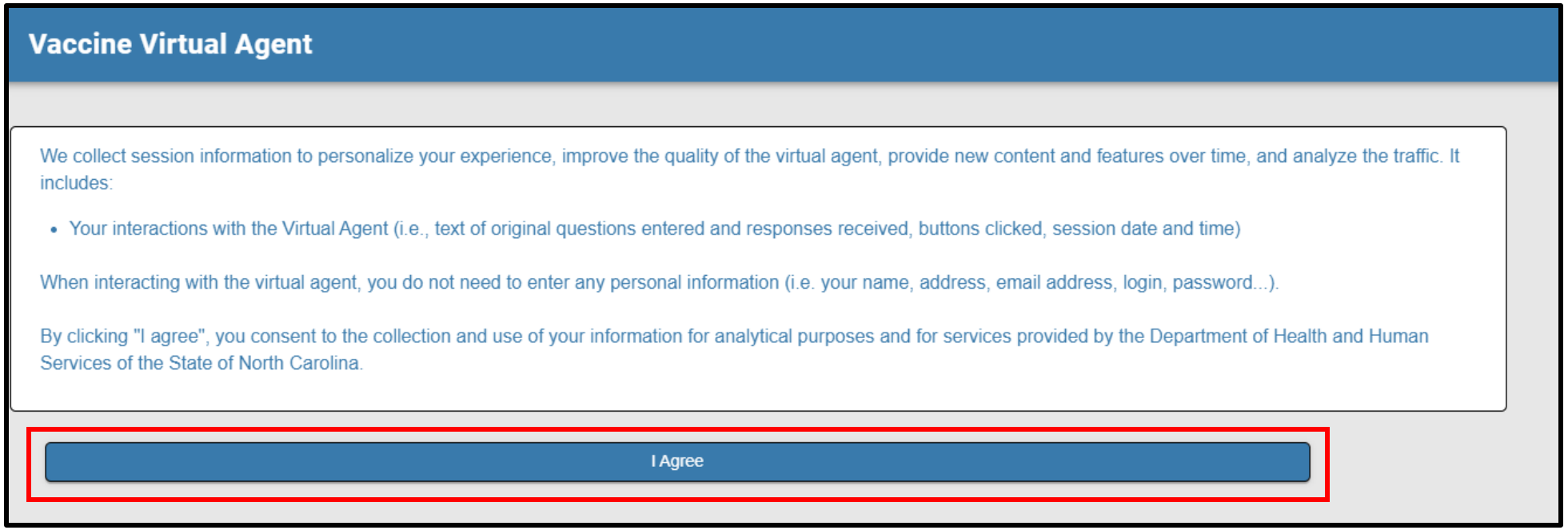
Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Vaccine Virtual Agent

The CVMS Virtual Agent launches in a new window.

1. Read the message, then click **I AGREE**



Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Vaccine Virtual Agent (continued)

2. Select your type of profile

3. Answer subsequent questions to find solutions to frequently encountered issues and questions

Audience

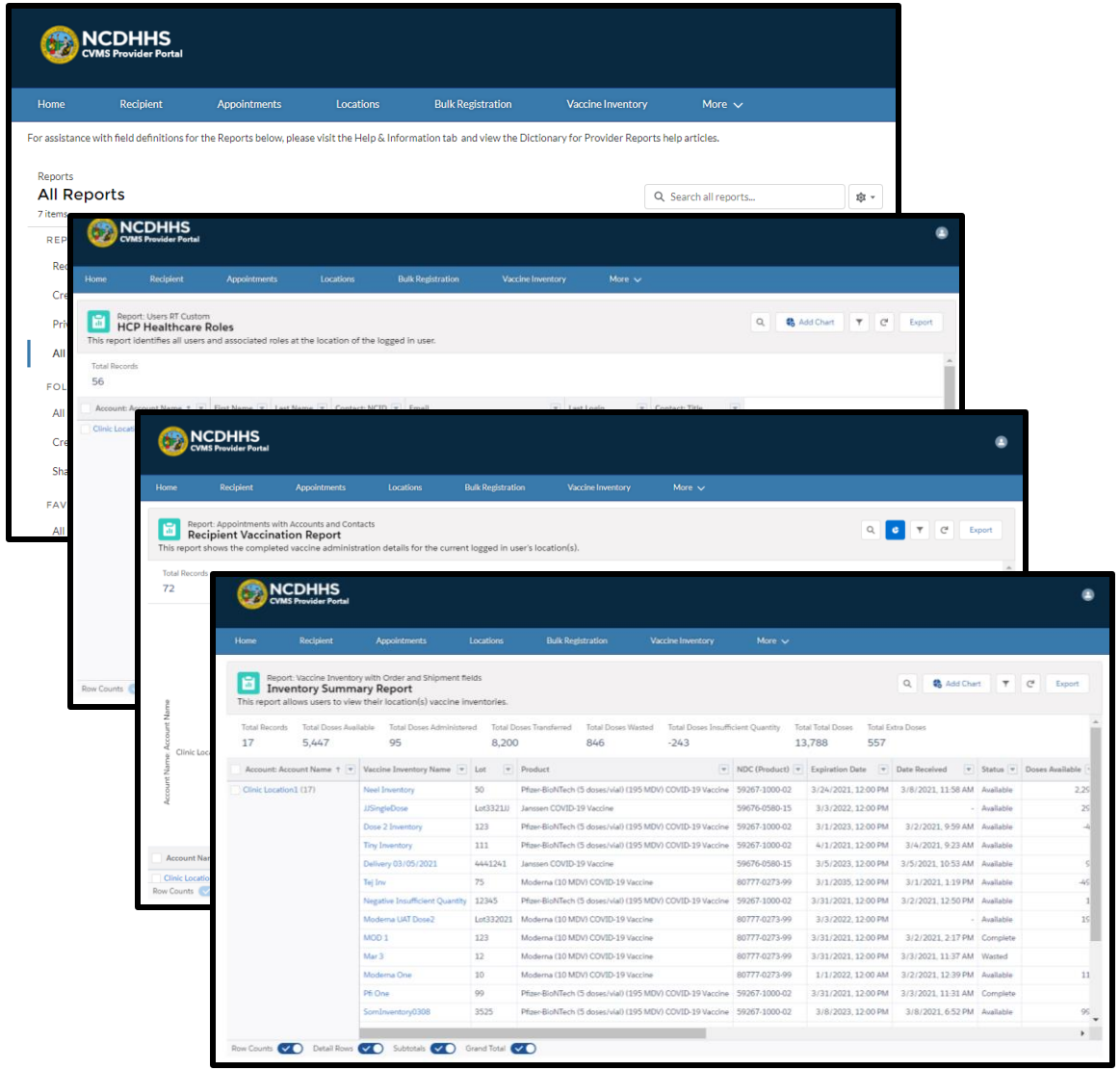
Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Accessing Reports (Users with a Location Manager Profile Only)

Overview



A report is a list of records that meet defined criteria. It is displayed in the CVMS Provider Portal in rows and columns, and can be filtered and sorted, or exported into Excel. It shows the latest data, and automatically updates as each record updates. This user guide will show you:

1. How to access the reports
2. How to filter or export report data
3. What reports are available in the CVMS Provider Portal

Only users with a **Healthcare Location Manager** profile can access available reports. They cannot create new reports or add new fields to the existing reports.

Reports available in the CVMS Provider Portal

There are several reports currently available for Healthcare Location Managers. These are the most common:

1. **Expiring Doses by Account and Manufacturer Report** – provides a breakdown of upcoming vaccine expirations to help prioritize administration or transfers
2. **HCP Healthcare Roles Report** - identify all users and associated roles at the location of the logged-in user
3. **Inventory Summary Report** - view your location(s) COVID-19 vaccine inventories
4. **Marketplace Inquiries Report** – view all inquiries made against your seek transfer matches in the Vaccine Marketplace
5. **Recipient Vaccination Report** - view all recipient vaccination details of your location(s)

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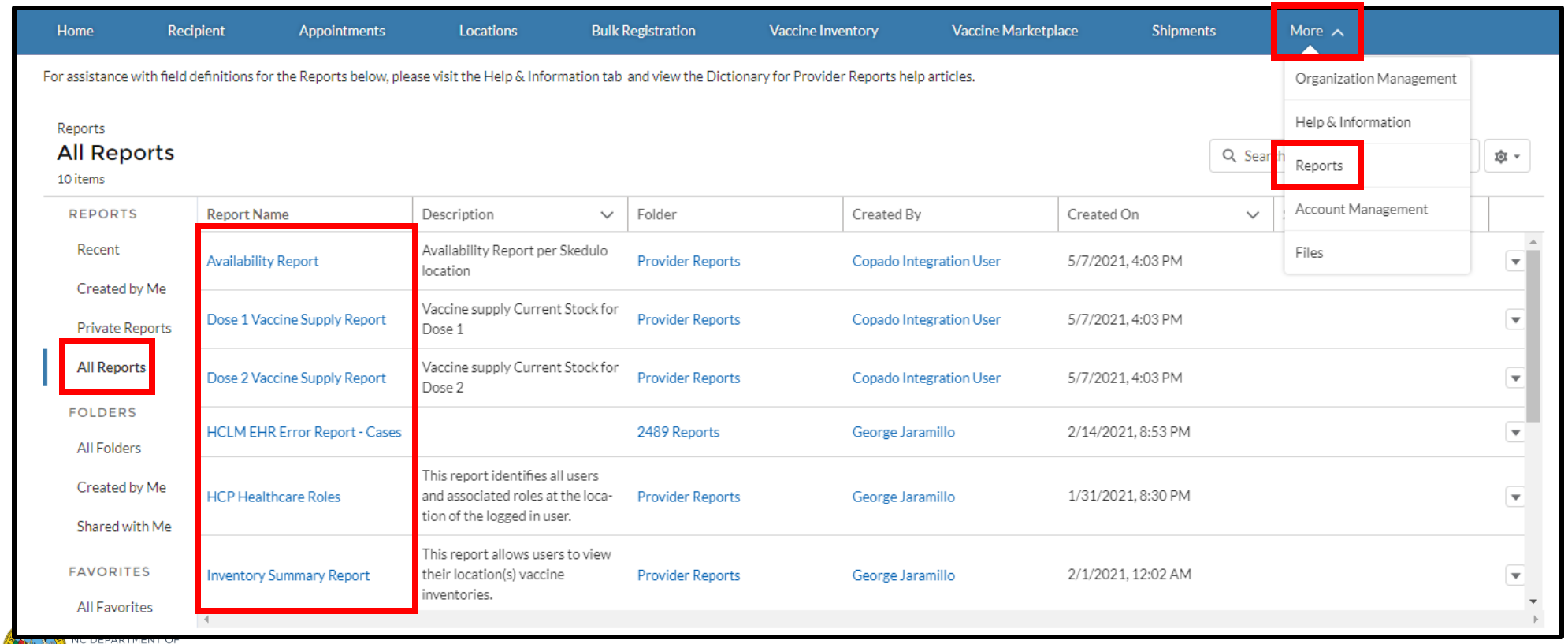
Accessing Reports

All reports that can be accessed by a Location Manager can be viewed in the **ALL REPORTS** section.

1. Once logged in, navigate to the **MORE** tab and click on **REPORTS.**
2. Select **ALL REPORTS** on the side menu.
3. Click on the **NAME OF THE REPORT** you wish to run.



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Note

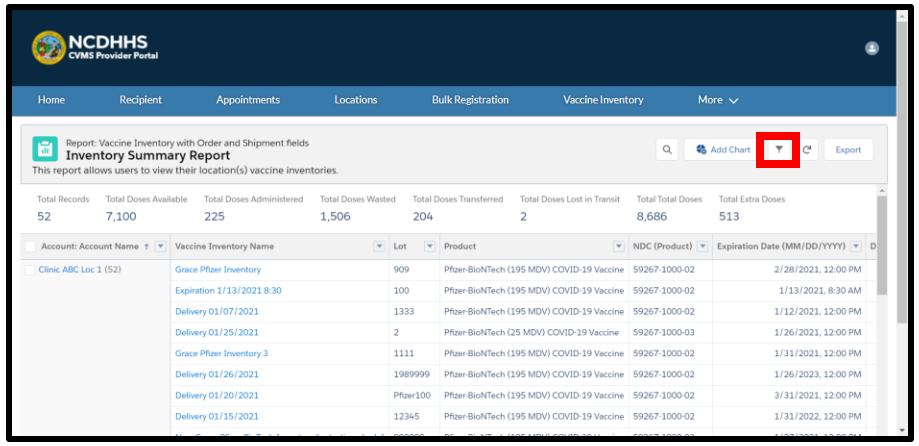
The page displayed when clicking the **REPORTS** tab will include standard fields and features that cannot be leveraged with your current profile level. Views named 'Created by Me', 'Private Reports', 'Shared with Me', and 'All Favorites' will not display any reports.

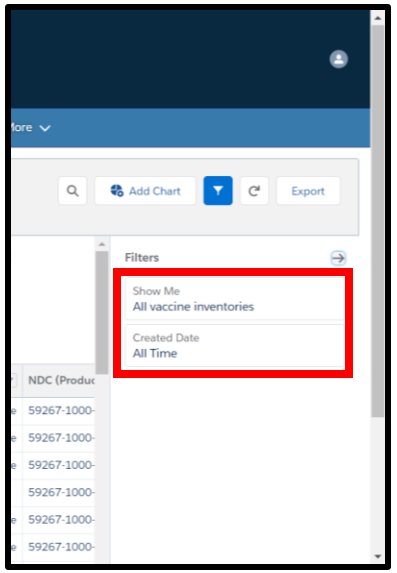
Accessing Reports
1 - Learn how to Filter and Format Reports

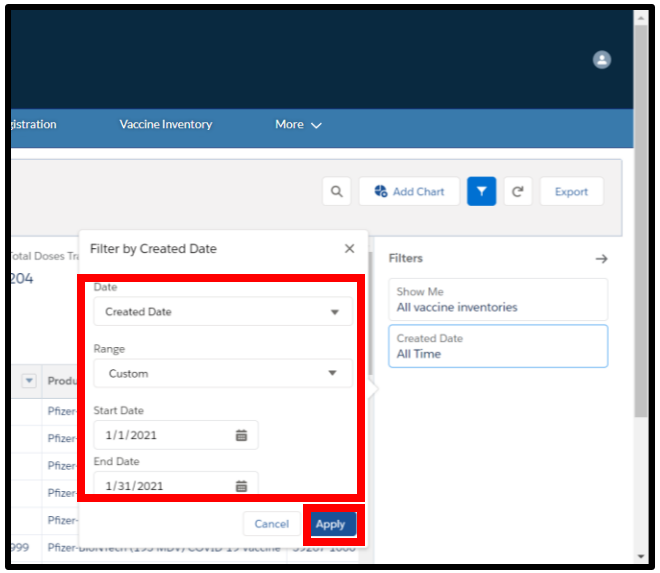
Applying Filters

FILTERS can be accessed through the filter b ▼ on on a report to modify the criteria that were set for the report. Each report will have a different list of filters available.

1. Click the **FILTER** icon.
2. Click the different filter's criteria fields.
3. Select the appropriate filter using the drop-down menus.
4. Click **APPLY** to view results.







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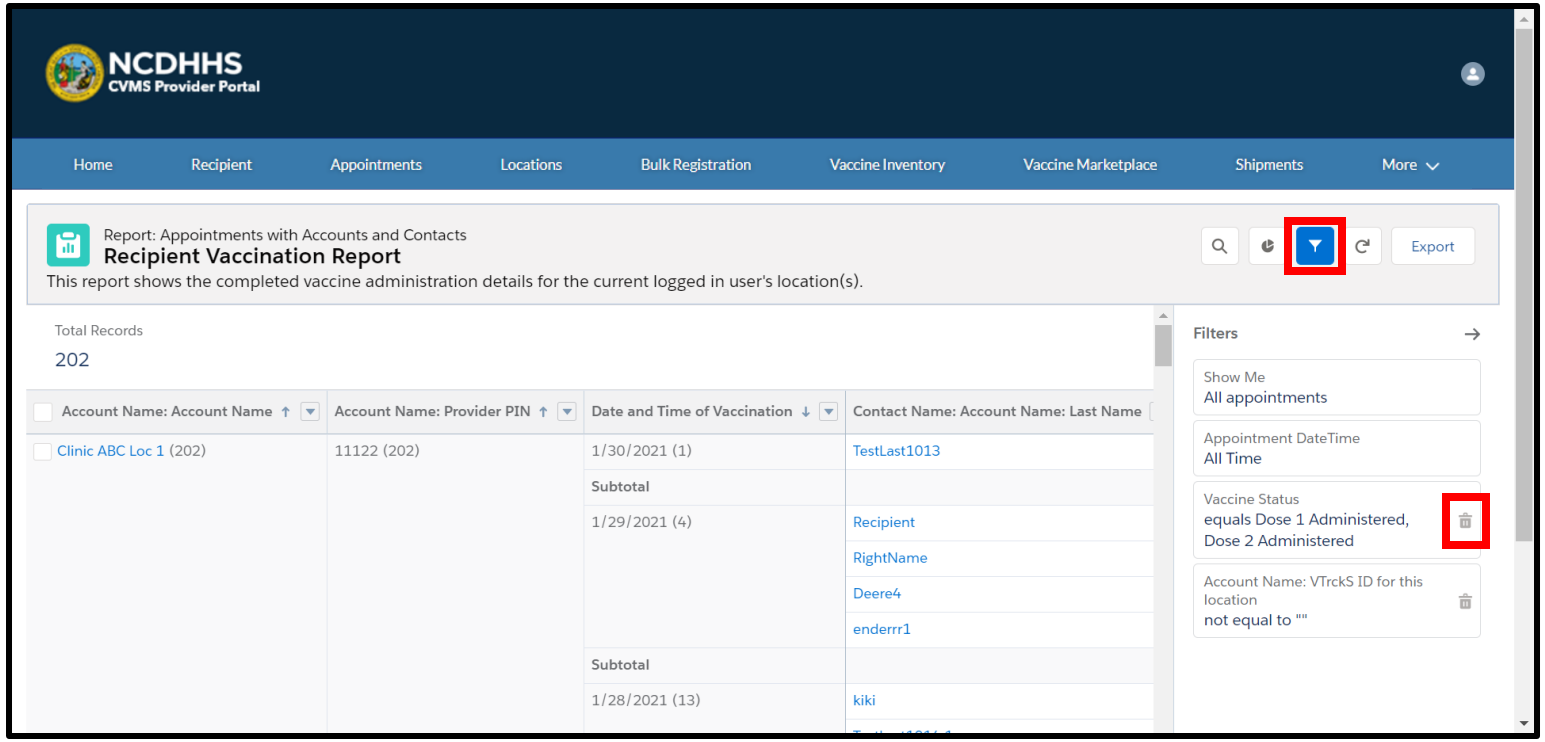
Tips

You can revert to the default filters on any report by refreshing your webpage.

Removing Filters

It is sometimes possible to remove some filter's criteria. Any criteria that is eligible to remove from the filter is identified via the **DELETE** icon.

1. Click the **FILTER** icon
2. Click the **DELETE** icon on eligible filter's criteria



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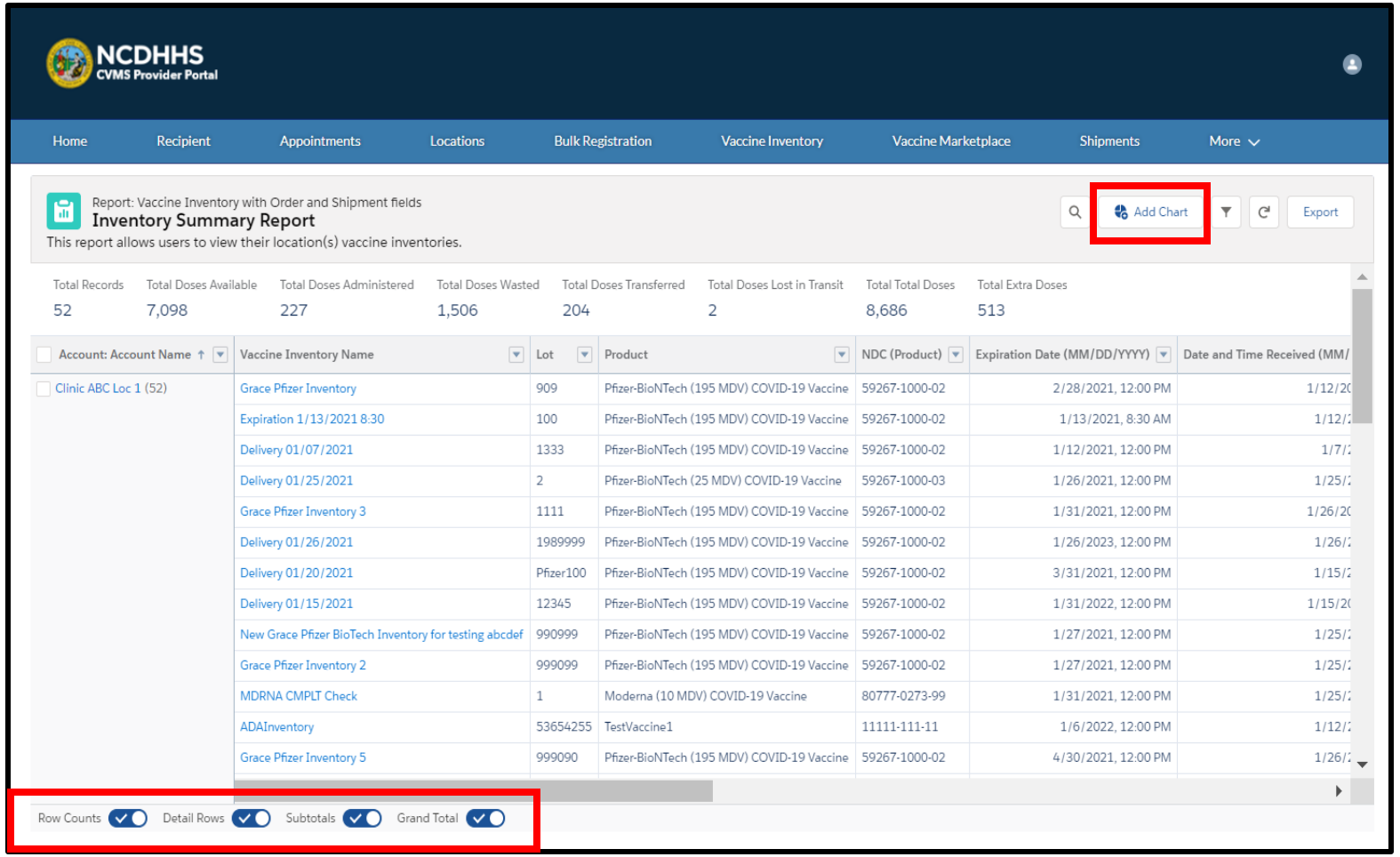
Formatting Reports

Several buttons are available to change the format of the Reports:



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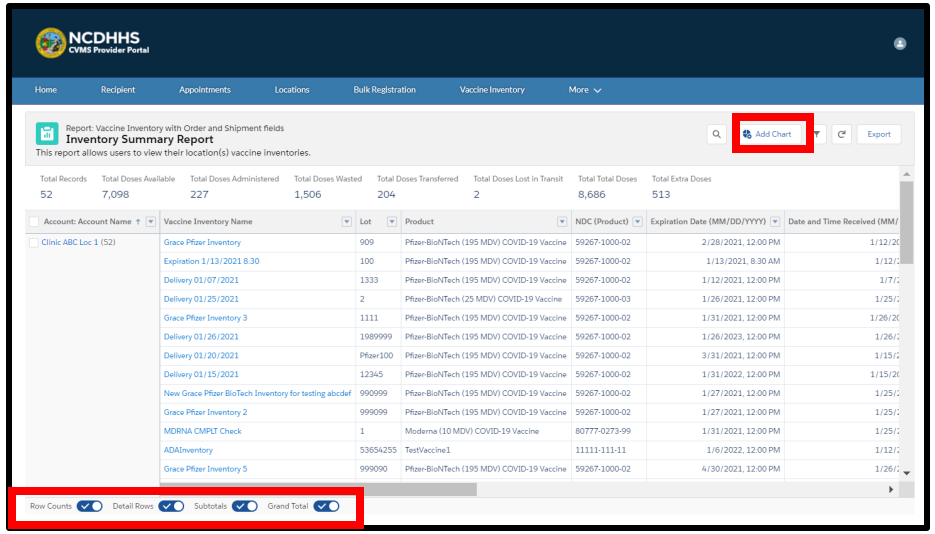
Formatting Reports

1. Show or hide **TOGGLE CHART** by hitting the Chart button or Add Chart located at the top-right of the report; the Chart displays the number of records per location
2. Show or hide **ROW COUNTS** by clicking the Row Counts button Row Counts located at the bottom to show or hide the Total Records count field displayed at the top left of the report
3. Show or hide **DETAIL ROWS** by clicking the Row Counts button Detail Rows located at the bottom to show or hide the records' details (one row = one record)
4. Show or hide **SUBTOTALS** by clicking the Row Counts button Subtotals located at the bottom to show or hide the row Subtotals which is the last row of the location
5. Show or hide **GRAND TOTAL** by clicking the Row Counts button Grand Total at the bottom of the report to show or hide the Totals displayed at the top of the report



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Tips

You can revert to the default format on any report by refreshing your webpage.

Formatting changes made to a report will carry over to the Format Report export option.

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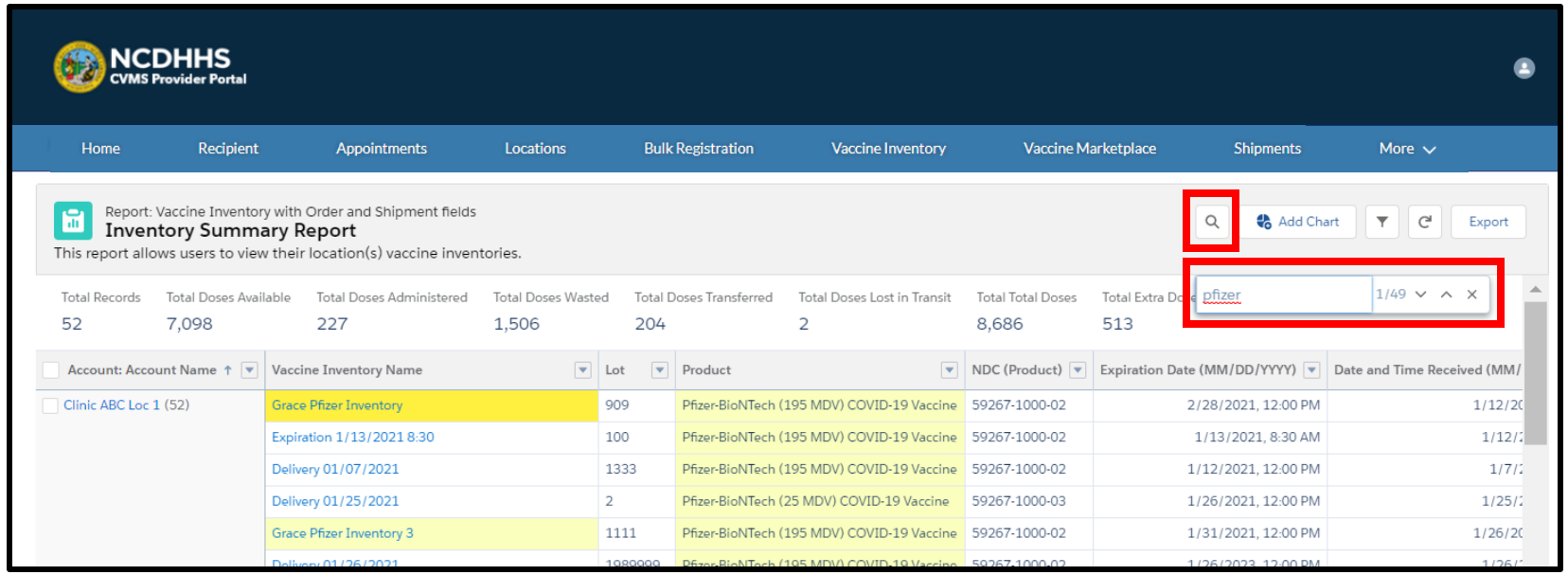
Search a Value within a report

Use the **SEARCH** feature at the top of the report to identify records containing values matching key words.

1. Click on the **SEARCH BUTTON**
2. Type a key word within the **SEARCH BAR** Search report table...
3. Each value within the report matching the key word will be highlighted in yellow.
4. You can navigate from one search result to the next by hitting the up and down buttons that appears within the search bar 1/49



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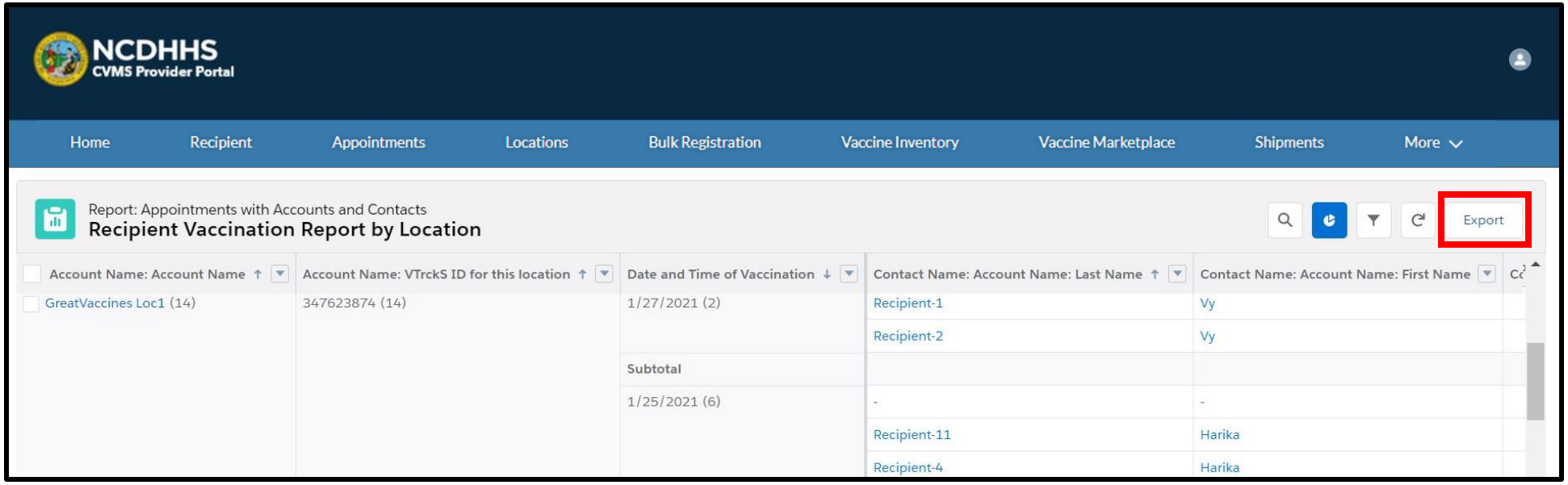
Accessing Reports
2 - Learn How to Export Reports

Step 1 of 3: Exporting Reports

Reports can be exported into formatted or unformatted Excel or CSV file formats.

1. Open the report, click on **EXPORT**



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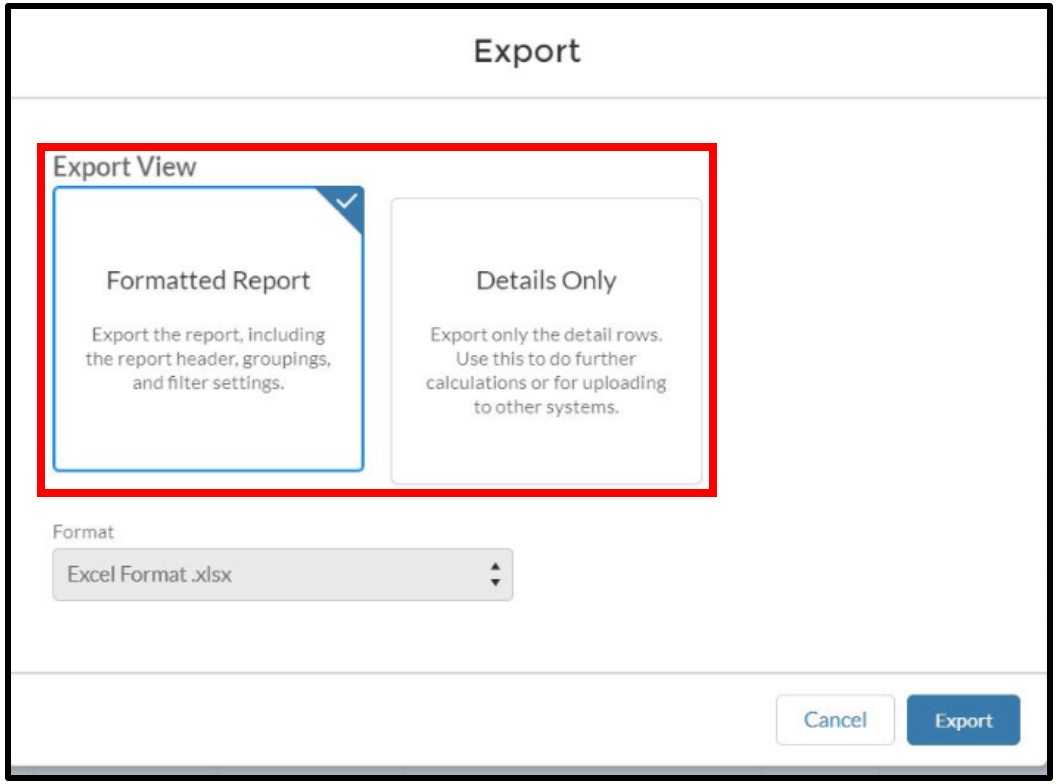
Step 2 of 3: Formatting Reports

1. Select **FORMATTED REPORT** or **DETAILS ONLY**
   - You can export your report with the same formatting, column summaries, and totals as are visible when you run the report, into the Excel file format (.xlsx) by selecting **FORMATTED REPORT.**
   - For a version of your report with just the records, select **DETAILS ONLY.**



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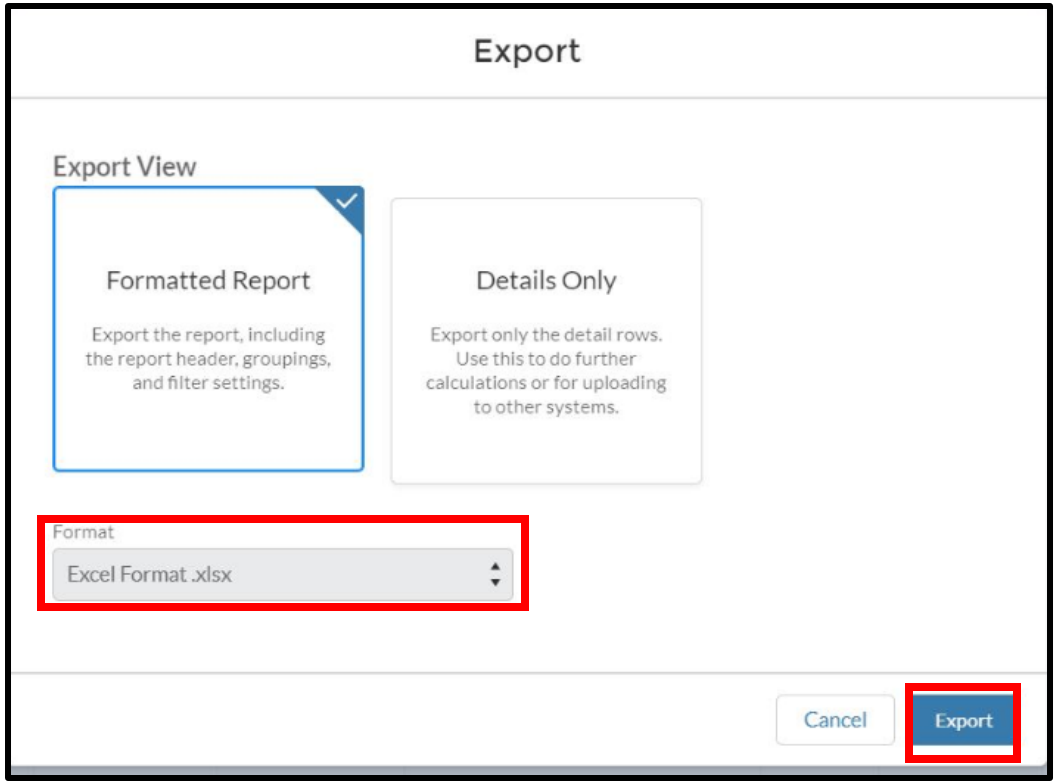
Tips

Review the previous section to see how to change the format and filters of a report.

Step 3 of 3: Exporting Reports

1. To change the file format, use the **FORMAT** drop-down to select either **EXCEL .XLSX** or **COMMA DELIMITED .CSV.**
2. Click on **EXPORT.**
3. You will see your export appear at the **BOTTOM OF YOUR BROWSER** (or in your **DOWNLOADS FOLDER).**



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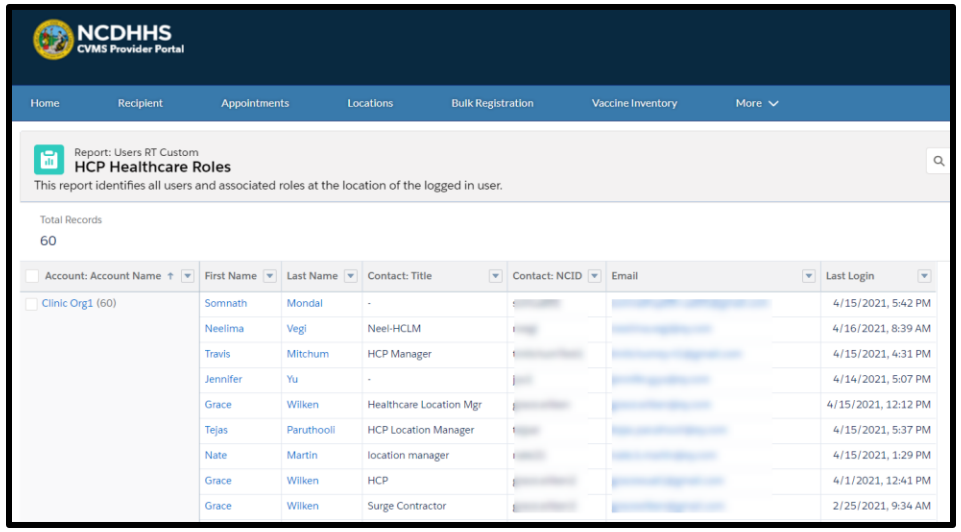
Accessing Reports
3 - Discover Available Reports

HCP Healthcare Roles Report



View the list of your location's users with access to the CVMS Provider Portal as well as their assigned roles.

INFORMATION DISPLAYED:

- First name, last name, title, NCID, email, last login

FILTERS AVAILABLE:

- Last Login Time and Date
- Note: Filter 'Show Me All Users' cannot be modified

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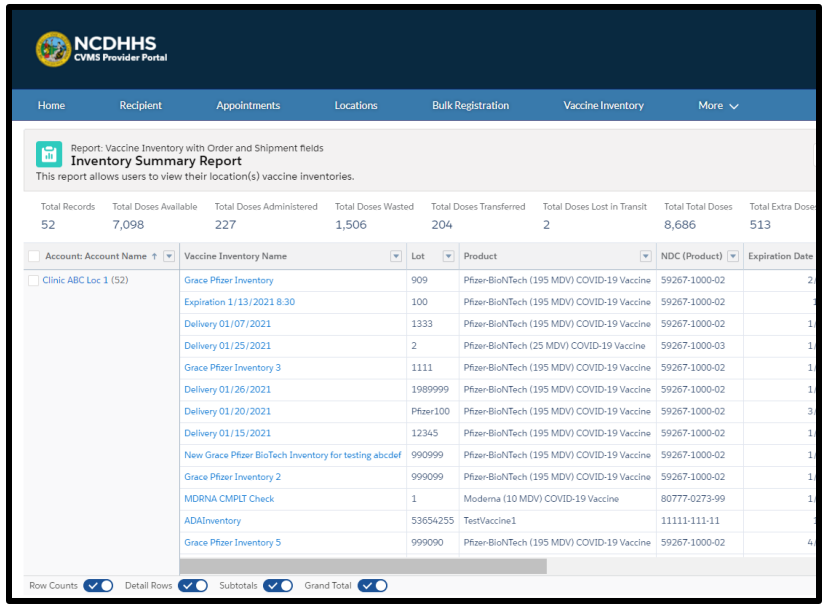
Tips

A user associated to more than one location will only be able to see this specific report for the location that they have selected under the Location of Operation when the accessed the CVMS Provider Portal. To see this specific report for their other locations, the user will have to select the other location under the Location of Operation and then come back to this report. For more information on how to select a Location of Operation, please see the CVMS Provider Portal Vaccine Switch Location Job Aid at [CVMS Provider Portal Switch Location].

Inventory Summary Report



View your locations' inventory summary details.

INFORMATION DISPLAYED:

- Inventory Record: inventory name, lot number, Product name, NDC, Expiration Date, Date and Time Received, Inventory Status (Available, Complete, Wasted, Reserved for Future use)
- Quantities: doses available, doses administered, doses wasted, doses transferred, doses lost in transit, total doses and extra doses

FILTERS AVAILABLE:

- Created Dates: filter on inventory received dates, inventory expiration date, transfer date, record creation date, etc.
- Note: Filter 'All Vaccine Inventories' should not be modified.

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Tips

DOSES AVAILABLE =

Total Doses **+** Extra Doses

MINUS

(**-** Doses Administered

- Doses Wasted

- Doses transferred

- Doses lost in transit)

A user associated to more than one location will see inventory information associated to each of these locations in this report.

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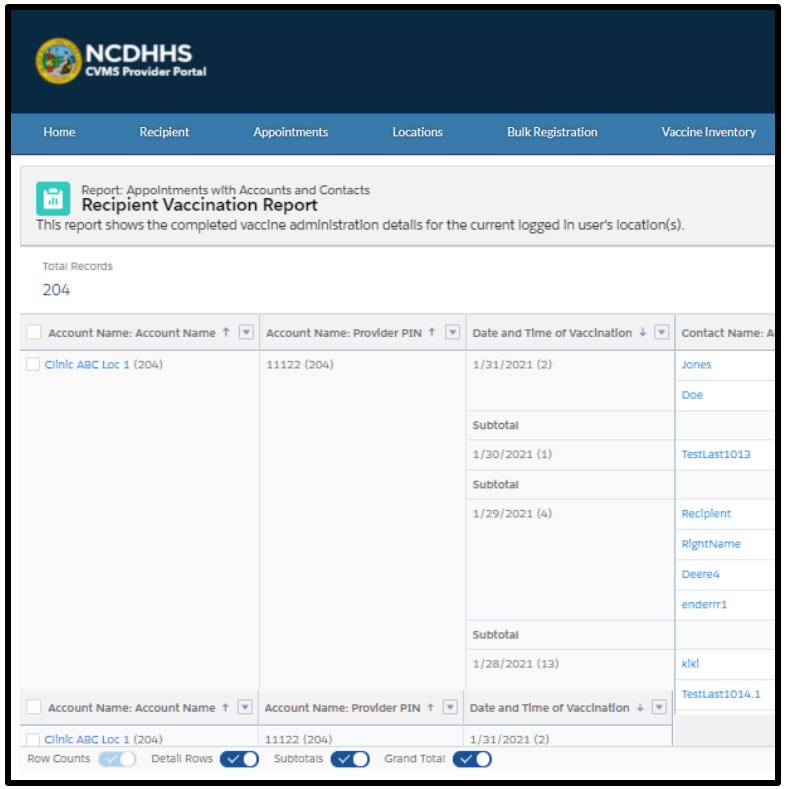
Recipient Vaccination Report



View all recipient vaccination details of your location.

INFORMATION DISPLAYED:

- Vaccination details: date and time, injection site, route, vaccine status (dose 1 administered, dose 2 administered), product, lot number, inventory name, administered by, notes
- Recipient details: last name, first name, birthdate, age, phone, email address, race, ethnicity, gender, priority tier group, contact county, eligibility status
- Location details: vaccine administration county, address

FILTERS AVAILABLE:

- Vaccine Status: click the remove button to see all appointment status (including those Registered, Canceled or Scheduled)
- Appointment Date Time: filter on Date/Time Closed, Opened, Date and Time of Vaccination, Date of Birth, Last Modified Date
- Note: Filters 'All Appointments' and 'VTrckS ID' should not be modified

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Tips

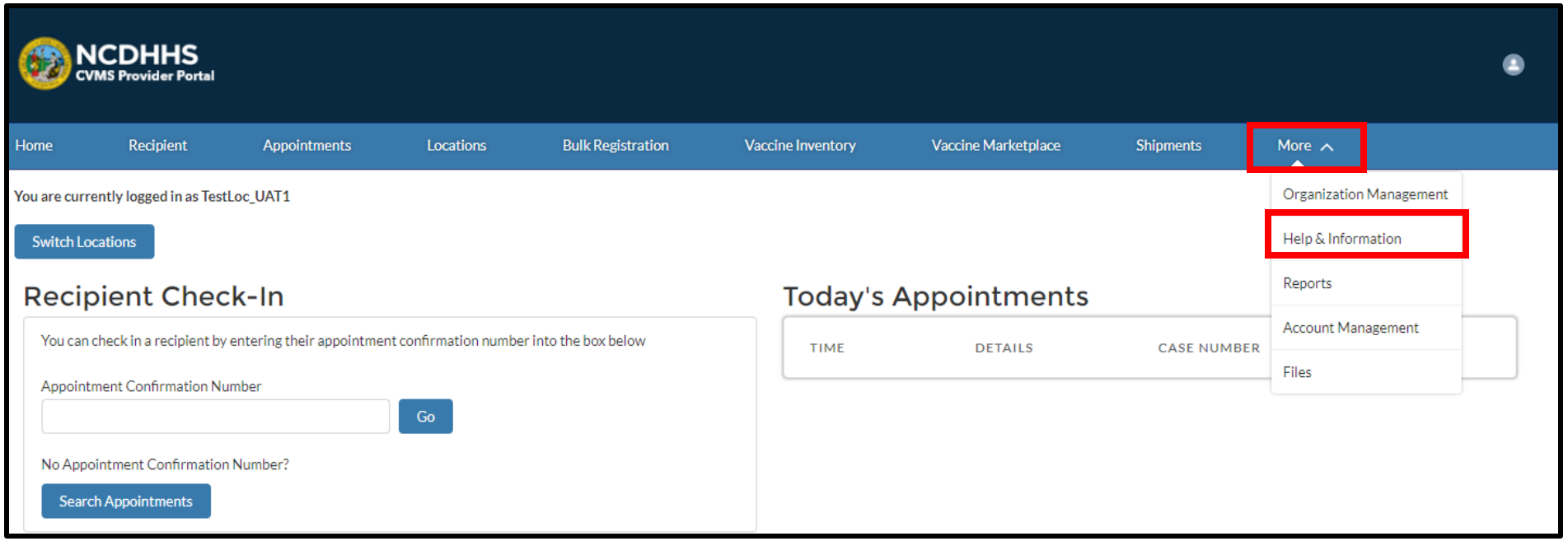
A user associated to more than one location will see vaccination information associated to each of these locations in this report.

Accessing Reports
4 - Check Reports' Data Dictionaries in the Help & Information tab

Accessing Help & Information

Find the Help & Information section to see detailed information for each type of report.

1. Navigate to **MORE** on the Menu Bar then select **HELP & INFORMATION**



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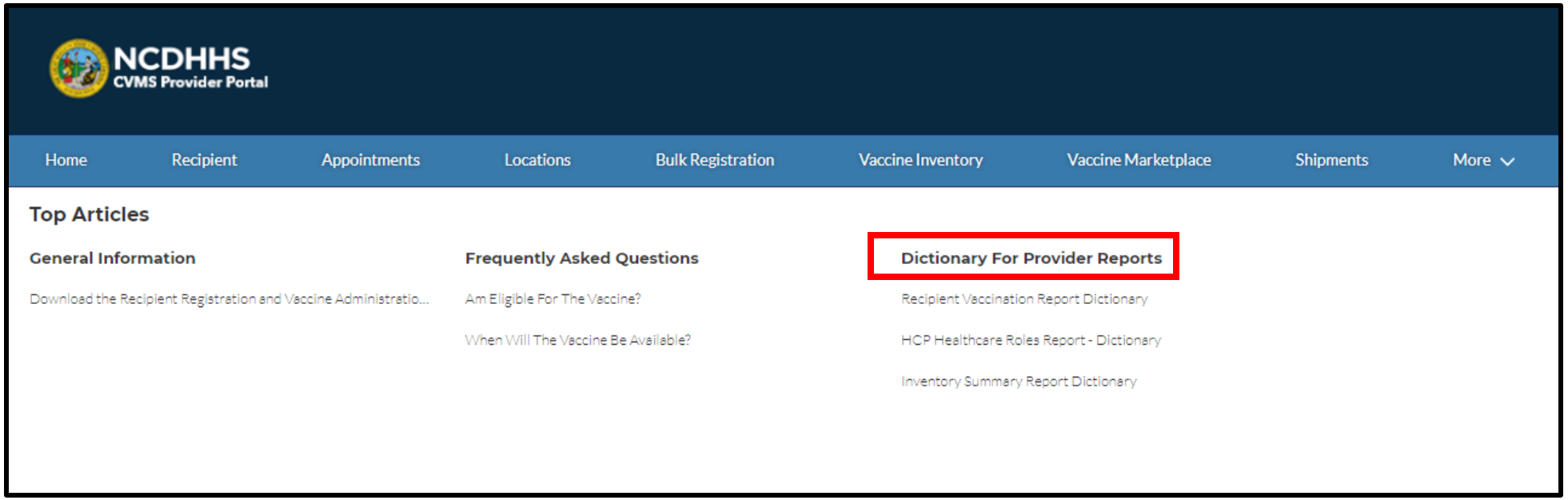
Dictionary for Provider Reports

1. Navigate to and click on the **DICTIONARY FOR PROVIDER REPORTS** to see associated articles.



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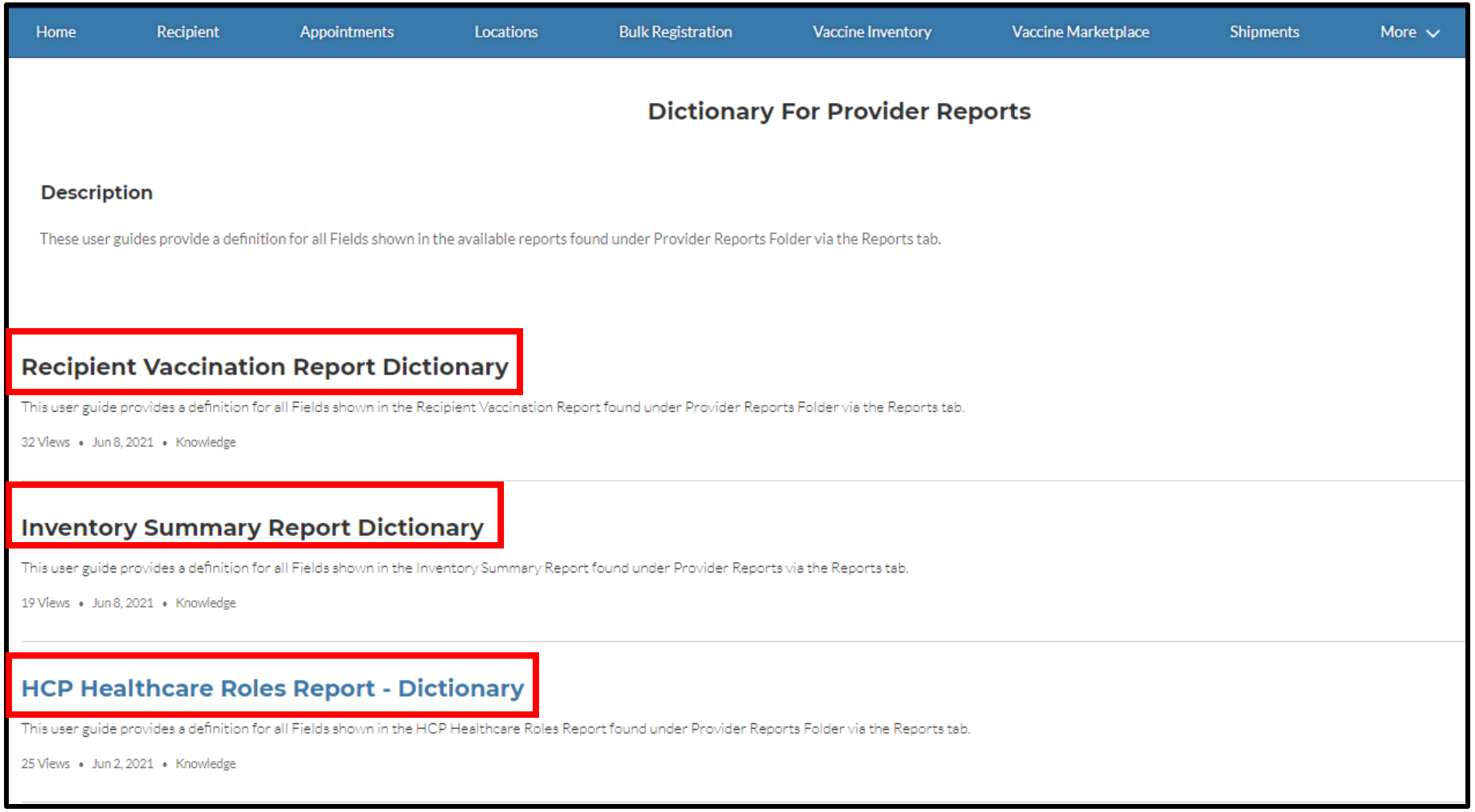
Selecting Articles in the Dictionary for Provider Reports

1. Select the desired article to view.



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Recipient Vaccination Report Dictionary

1. Each dictionary will provide a detailed list of terms for each report available.

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

DICTIONARY FOR PROVIDER REP...

Recipient Vaccination Report Dictionary

This user guide provides a definition for all Fields shown in the Recipient Vaccination Report found under Provider Reports Folder via the Reports tab.

Feb 4, 2021 • Knowledge

Title
Recipient Vaccination Report Dictionar

Summary
This user guide provides a definition for

Content
This report is *only* viewable by Healthc

Section	Field
Details	Account Name: Account Name
Details	Account Name: Provider PIN
Details	Date and Time of Vaccination
Details	Contact Name: Account Name: L
Details	Contact Name: Account Name: F
Details	Contact Name: Birthdate
Details	Contact Name: Age
Details	Contact Name: Home Phone

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

DICTIONARY FOR PROVIDER REP...

Inventory Summary Report Dictionary

This user guide provides a definition for all Fields shown in the Inventory Summary Report found under Provider Reports via the Reports tab.

Feb 4, 2021 • Knowledge

Title
Inventory Summary Report Dictionary

Summary
This user guide provides a definition for all Fields shown in the Inventory Summary Report found under

Content
This report is *only* viewable by Healthcare Organization Admins and Healthcare Location Managers.

Field	Definitions
Account: Account Name	The Vaccine Provider location name
Vaccine Inventory Name	The name of the Vaccine Inventory Is given default name "Delivery MM/D
Lot	Unique identifier for the received Vaccine product's batch
Product	The Manufacturer of the Vaccine Product
NDC (Product)	Each Listed drug product is assigned a 10-digit, 3-segment number The id
Expiration Date (MM/DD/YYYY)	The date the Vaccine Product and all associated dosage is unusable
Status	Indicates the current state of Vaccine Product, can be; Complete, Reserve
Date and Time Received (MM/DD/YYYY)	The date and time the Vaccine Product was received by the Location This
Total Doses	Sum of all Doses when inventory records were initially created, prior to re

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

DICTIONARY FOR PROVIDER REP...

HCP Healthcare Roles Report - Dictionary

This user guide provides a definition for all Fields shown in the HCP Healthcare Roles Report found under Provider Reports Folder via the Reports tab.

Feb 4, 2021 • Knowledge

Title
HCP Healthcare Roles Report - Dictionary

Summary
This user guide provides a definition for all Fields shown in the HCP Healthcare Roles Report found under Provider Reports Folder via the Reports tab.

Content
This report is *only* viewable by Healthcare Organization Admins and Healthcare Location Managers.

Section	Field	Definitions
Details	Account: Account Name	The Location Name
Details	First Name	The First Name of the user at this location
Details	Last Name	The Last Name of the user at this location
Details	Title	The Title of the user at this location
Details	Contact: NCID	Unique username login ID for North Carolina systems
Details	Email	The email address of the user
Details	Last Login	The date and time this HCP user last logged into the system

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Appendix

CVMS Steps For Providers

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

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
- A Toggle can be clicked to see selectable options.
- A Pen can be clicked to make edits to the field.
- Previous Next Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
- Pause A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more details 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	Changes Made	Author
1	12/10/2020	• Uploaded the first version of the PPT	Training Team
2	1/10/2021	• Removed any mention of the 2 CVMS Help Desk emails • Added Service Now Portal information • Screenshot of new bulk upload added	Courtney Seward
3	1/15/2021	• Updated navigation bars for both CVMS Provider Profiles • Updated Recipient Tab search feature	Azalea Troche
4	2/1/2021	• Updated the screen shots for Location manager to show reports tab on nav bar • Added Statewide Profile content • Added Reports tab content and Appointments tab content	Kristin Clark; Tabitha McKelvy
5	2/12/2021	• Add Slides for Account Management and Organizational Management • Added session expired tip • Added multi locations slide • Updated screen shots of the expanded more tabs list	Kristin Clark
6	3/11/2021	• Added Locations tab slide • Changed Scheduling tab to show Locations tab • Updated all nav bars for location manager • Updated screen shots to show Recipient Check In component	Kristin Clark
7	4/15/2021	• Updated Recipient screenshot to include e-mail search and Vaccine Product Name • Updated Appointments screenshot to include Cancellation status • Added “confirmation code” to text to Appointments search • Updated Switch Locations screenshot to include current navigation bar	Darrell Lee
8	6/15/2021	• Added Confidentiality Agreement at first login slide • Added Vaccine Marketplace Overview • Added Files Tab Overview • Updated screenshots to reflect Vaccine Marketplace Tab	Darrell Lee
9	6/28/2021	• Added chatbot/Vaccine Virtual Agent slides • Updated branding from MySpot.NC.gov to Vaccines.gov	Darrell E. Lee

User Guide Change Log

Version	Date of Change	Changes Made	Author
10	07/28/2021	• New consolidated version • Added Accessing Reports to the User Guide	Vanessa Kemajou Darrell Lee
11	09/01/2021	• 38 – Listed additional reports	Darrell Lee