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

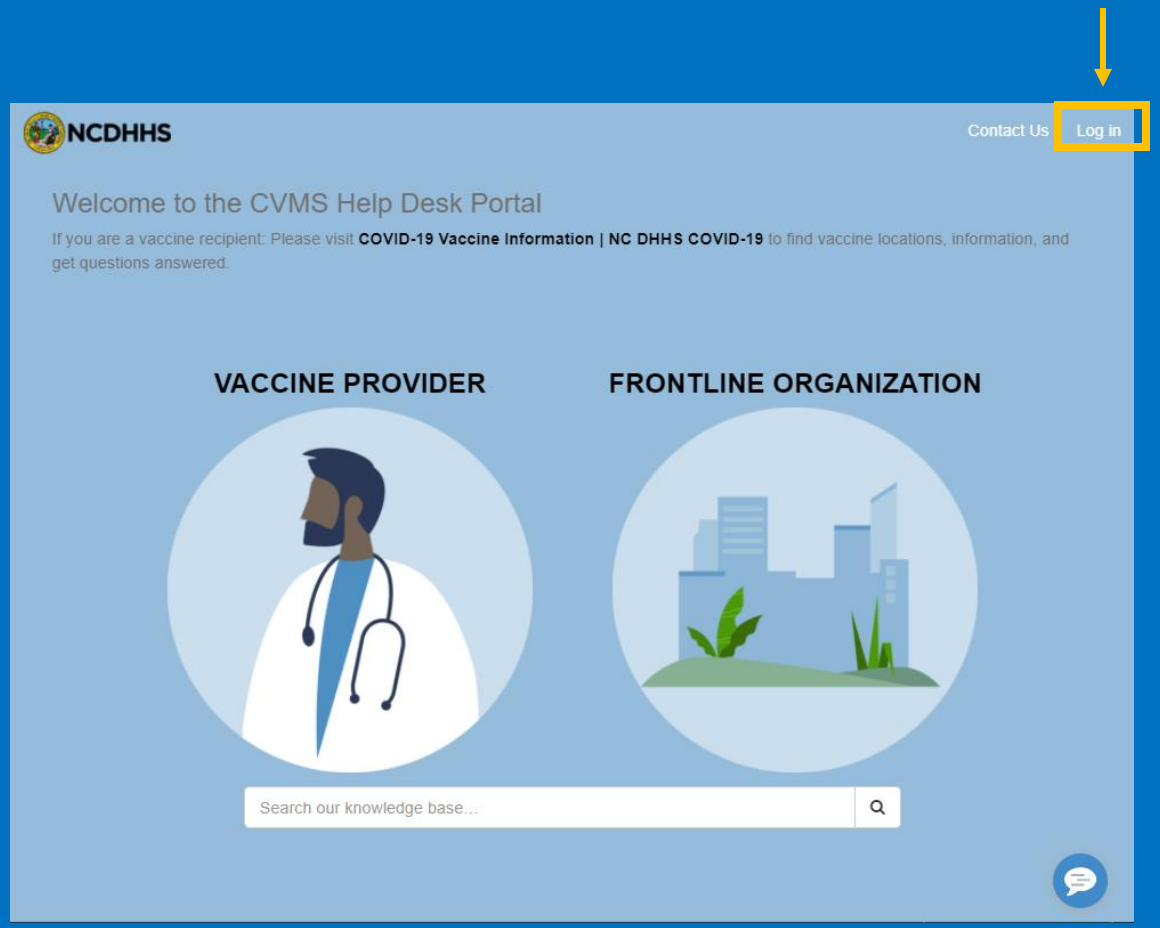
## Step 1 - Register your organization

## User Guide

Version 12

September 15, 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: 8 am – 4 pm ET
Sunday: Closed

* 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 '**Login**' then **'Register'** on the left side of the screen
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

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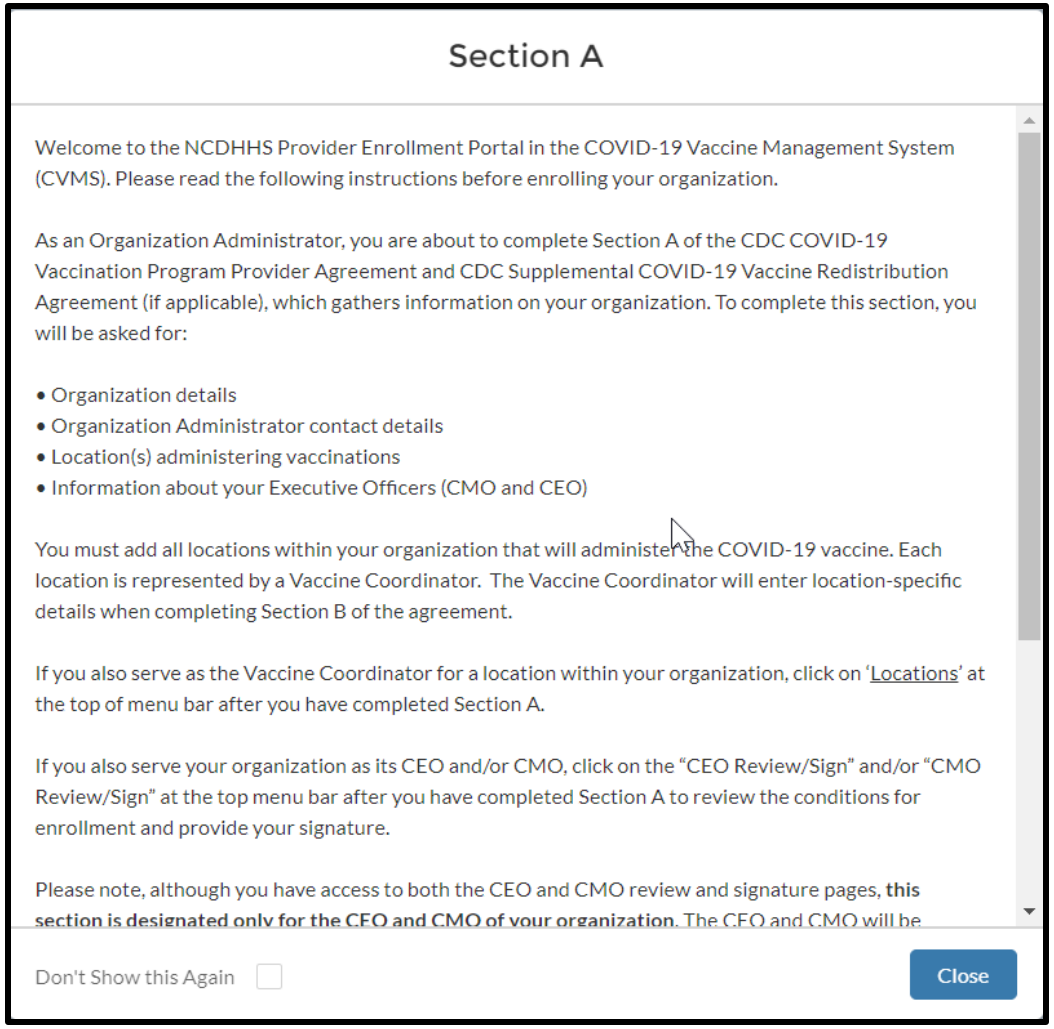
# Overview

# Overview




In this user guide, we will discuss how to start enrolling your organization in CVMS by creating your Organization Administrator Account and completing Section A of the enrollment.

The content included in this training is for the following role: **Organization Administrator.**

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Edge Chromium or Safari browsers
- Log into the CVMS Provider Enrollment Portal (https://covid-enroll.ncdhhs.gov/)

**Now, let's get started!**

# Provider Enrollment Process Overview

The COVID-19 Vaccination Program Provider Enrollment Process takes place in the **CVMS PROVIDER ENROLLMENT PORTAL** in five steps:

**Start**
- Create your User Account

→

**The Organization Administrator completes Section A**
- Enter Organization Details
- Add Vaccine Location(s) Contact Information
- Add your CEO and CMO Contact information

→

**The Vaccine Coordinator(s) complete Section B**
- Enter Location Details
- Enter Practicing Provider(s) Details
- Enter Vaccine Shipping/Storage Details

→

**CEO & CMO Submit**
- E-sign the agreement(s)

→

**NCDHHS Reviews**
- Review, Approve or Decline

## Additional Resources

- CVMS Provider Enrollment Portal - https://covid-enroll.ncdhhs.gov/
- Vaccine Readiness Checklist - https://covid19.ncdhhs.gov/covid-19-vaccine-readiness-checklist-download/download
- Learning Materials: https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers

# There are Four User Profiles Available, and this User Guide Focuses on the First Profile

**COMPLETE THE CHECKLIST** below for **EACH ROLE** that you serve in your organization

## Organization Administrator

- ❑ **Create** your user account
- ❑ Mark if your organization is a **Redistribution Participant**
- ❑ **Add** all locations and enter for each location the vaccine coordinator(s) contact information
- ❑ Add your organization's **CEO**
- ❑ Add your organization's **CMO**

## Vaccine Coordinator

- ❑ **Register** for a Provider Enrollment account via the link in the welcome email
- ❑ **Upload pictures** of the interior and exterior of your **storage units**
- ❑ **Input all practicing providers** at your location
- ❑ Review and sign the **CDC COVID-19 Vaccination Program Provider Agreement**
- ❑ Review and sign the **Storage and Handling Attestation**

**For locations with at least 25 practicing providers**, return completed **Practicing Provider Bulk Upload Template** to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine

## Chief Executive Officer (CEO)

- ❑ **Register** for a Provider Enrollment account via the link in the welcome email
- ❑ Review and sign the **CDC COVID-19 Vaccination Program Provider Agreement**
- ❑ If applicable, review and sign the **CDC Supplemental COVID-19 Vaccine Redistribution Agreement**

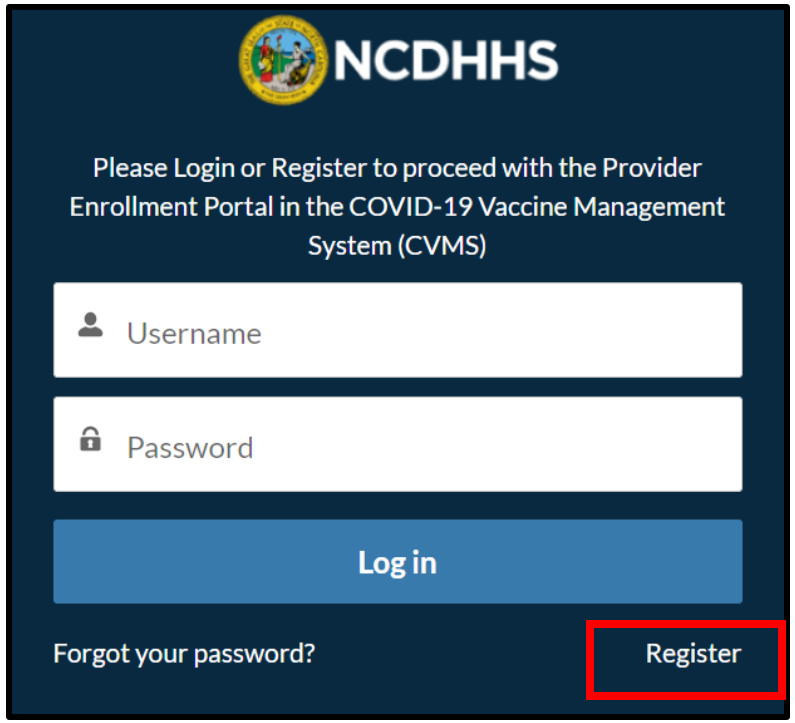
## Chief Medical Officer (CMO)

- ❑ **Register** for a Provider Enrollment account via the link in the welcome email
- ❑ Review and sign **the CDC COVID-19 Vaccination Program Provider Agreement**
- ❑ If applicable, review and sign the **CDC Supplemental COVID-19 Vaccine Redistribution Agreement**

**Note:** A single user can assign to themselves all four profiles above if applicable and complete the enrollment process.

# Create your User Account with an Organization Administrator Profile

# Step 1 of 2: Navigate to CVMS Provider Enrollment Portal



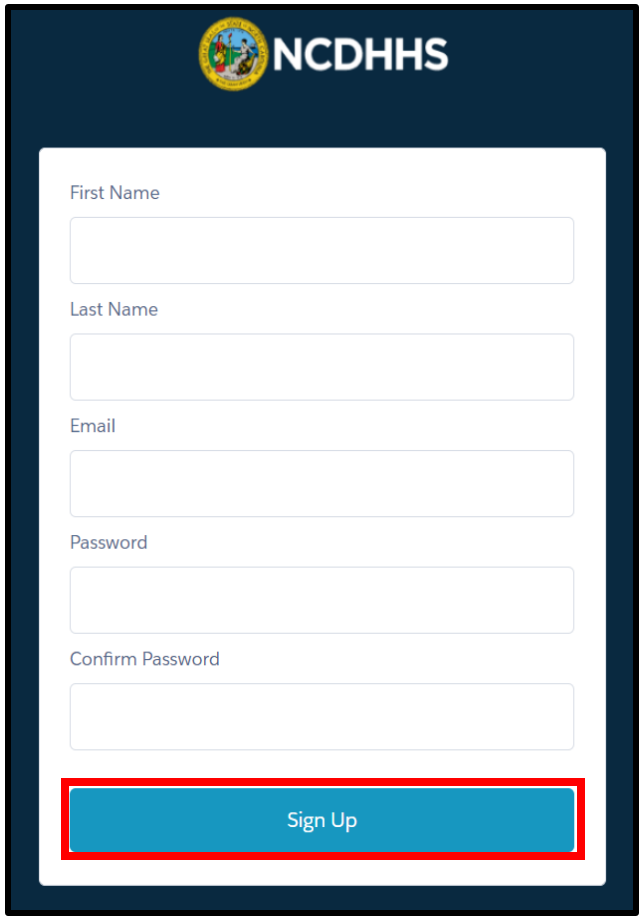

When you are ready to begin enrolling,

1. Navigate to the CVMS Provider Enrollment Portal at https://covid-enroll.ncdhhs.gov
2. Click the **REGISTER** button

**Audience**

**Organization Administrator**

# Step 2 of 2: Finalize your Registration




Begin by creating your account.

1. Enter you **FIRST NAME** and **LAST NAME**
2. Enter your **EMAIL**.

   *Note: This will be the username you use to log in to the CVMS Provider Enrollment Portal*
3. Enter your **PASSWORD**

   *Passwords must meet the following criteria:*

   *1) Be at least 12 characters*

   *2) Include at least 1 uppercase letter*

   *3) Include at least 1 lowercase letter*

   *4) Include at least 1 special character*

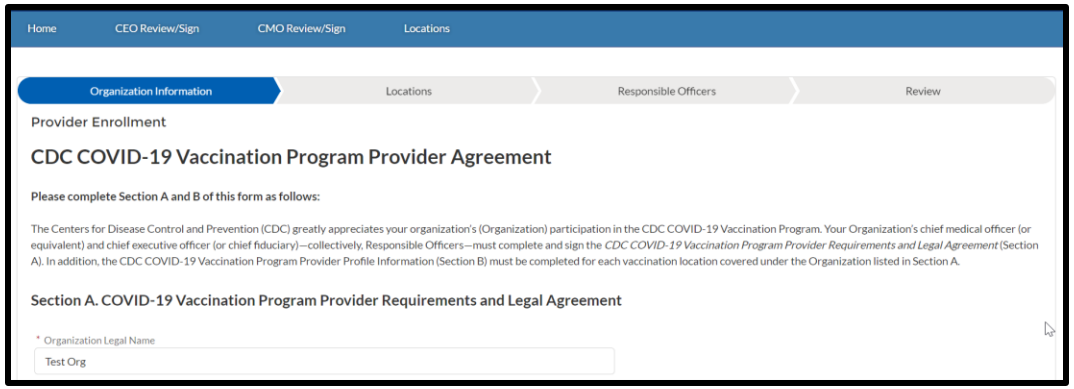
   *5) Include at least 1 number*
4. Click **SIGN UP**

**Audience**

**Organization Administrator**

# Complete Section A

# Step 1 of 7: Enter Your Organization Details



Once you begin Section A, you will be prompted to enter your **organization details** and indicate if your **organization is a redistribution participant**.

1. Populate **ALL REQUIRED ORGANIZATION DETAILS**
2. If your organization is a redistribution participant, select **YES** next to **REDISTRIBUTION PARTICIPANT**
3. If you select Yes, your **CEO and CMO** will be required to **SIGN AN ADDITIONAL AGREEMENT** indicating that they have reviewed the submitted information and signed the redistribution agreement.
4. Review all details entered
5. Click **NEXT**

## Audience

**Organization Administrator**

## Tips

You can pause and save your progress at any point before submitting Section A.

If you pause, you must logout before logging in and continuing your session.

If your organization address is outside of North Carolina, select **OTHER** for county.

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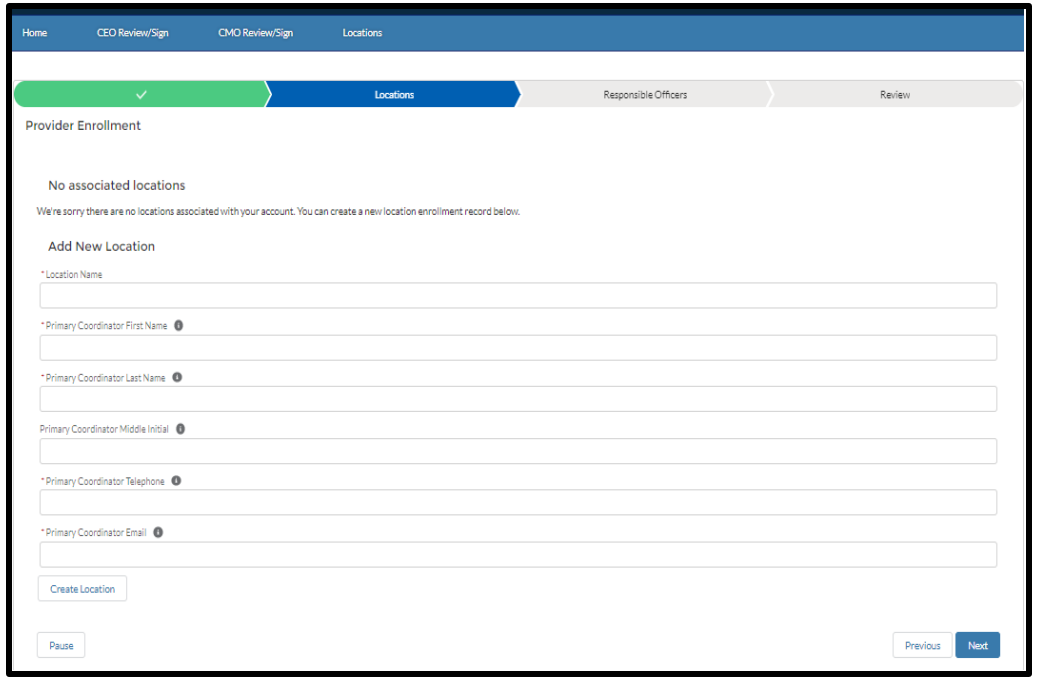
# Step 2 of 7: Add Your Location(s) Details




After entering your organization's details, you will now be able to **ADD ONE OR MORE LOCATIONS** that are storing and/or receiving shipments of the COVID-19 vaccine and their respective details.

1. Complete the information for the **FIRST LOCATION** in the organization
2. Click **CREATE LOCATION**
3. You will see the location details appear in the list of **PENDING LOCATIONS**
4. Repeat this process for each location you wish to add
5. Click **NEXT**

## Audience

**Organization Administrator**

## Tips

All locations within an organization must have the same CMO and CEO.

Enter your information if you will also be the Primary Vaccine Coordinator.

You can add more locations later as needed.

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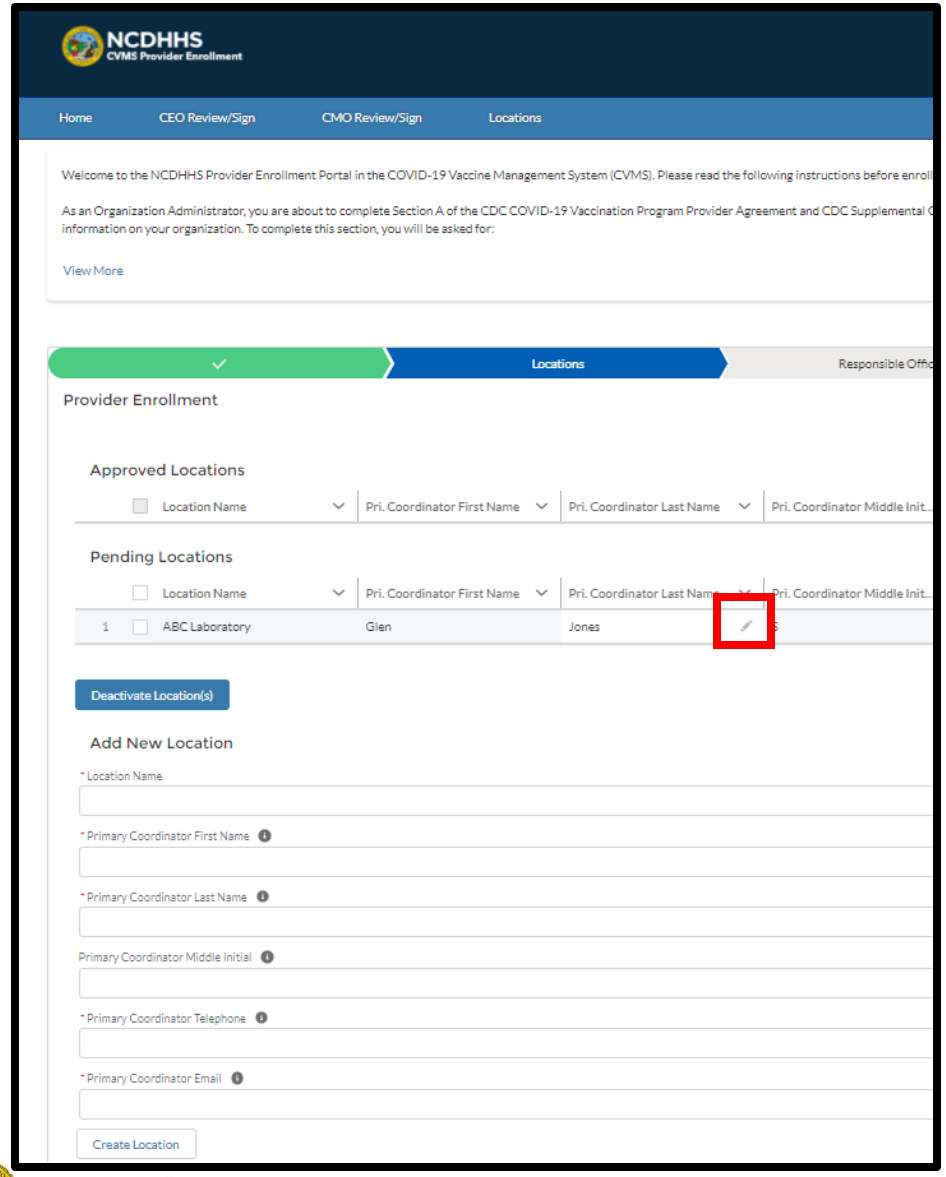
# Step 3 of 7: Edit Your Location(s) Details




After adding a location, you can edit and update the information.

1. Identify the **LOCATION** you wish to edit
2. Click the **PENCIL ICON** next to the field you wish to update
3. Update the information
4. Review the information. Repeat for all details you wish to update.
5. Click **NEXT**

**Audience**

**Organization Administrator**

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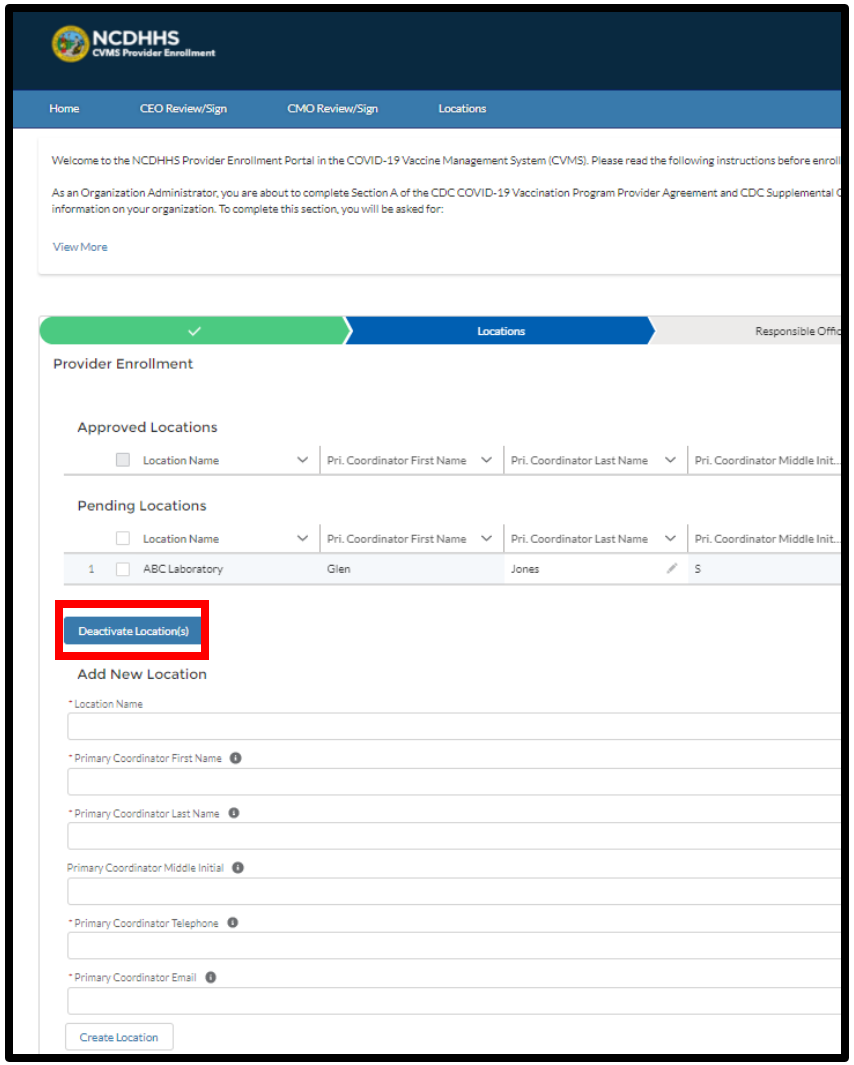
# Step 4 of 7: Deactivate Your Location(s)




After adding a location, you can deactivate location(s).

1. Identify the **LOCATION** you wish to deactivate
2. Select the **CHECKBOX** for one or more locations
3. Review the locations you have selected to deactivate
4. Click the **DEACTIVATE LOCATION(S)** button
5. Click **NEXT**

## Audience

**Organization Administrator**

## Tips

Deactivate locations so they are not considered as part of the review of your Provider Enrollment Agreement.

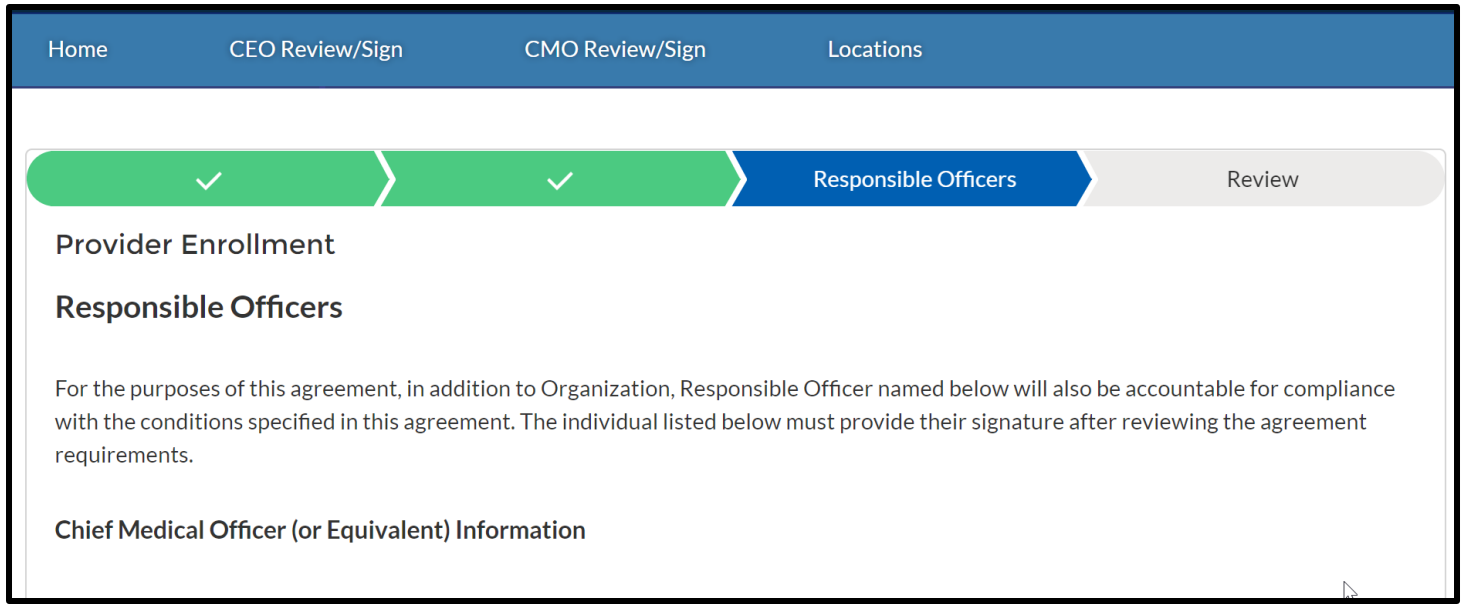
Deactivated locations will not be able to receive or store shipments of the COVID-19 vaccine.

# Step 5 of 7: Complete CMO Information

After adding your locations, you will enter your **CHIEF MEDICAL OFFICER** (CMO) Information on the Responsible Officers page.

At the bottom, you will see the box **SEND REQUEST FOR SIGNATURE NOW** checkbox. This will immediately generate an email to the CMO requesting their review and approval. **WE RECOMMEND THAT YOU DO NOT SELECT THIS BOX AT THIS TIME.**

1. Enter **ALL CMO DETAILS** matching what is on their provider license.
2. Click **NEXT**




**Audience**

Organization Administrator

**Tips**

If you do not check the **send request for signature now** checkbox, the CMO will be notified once all vaccine coordinators complete Section B of the Provider Enrollment Agreement.

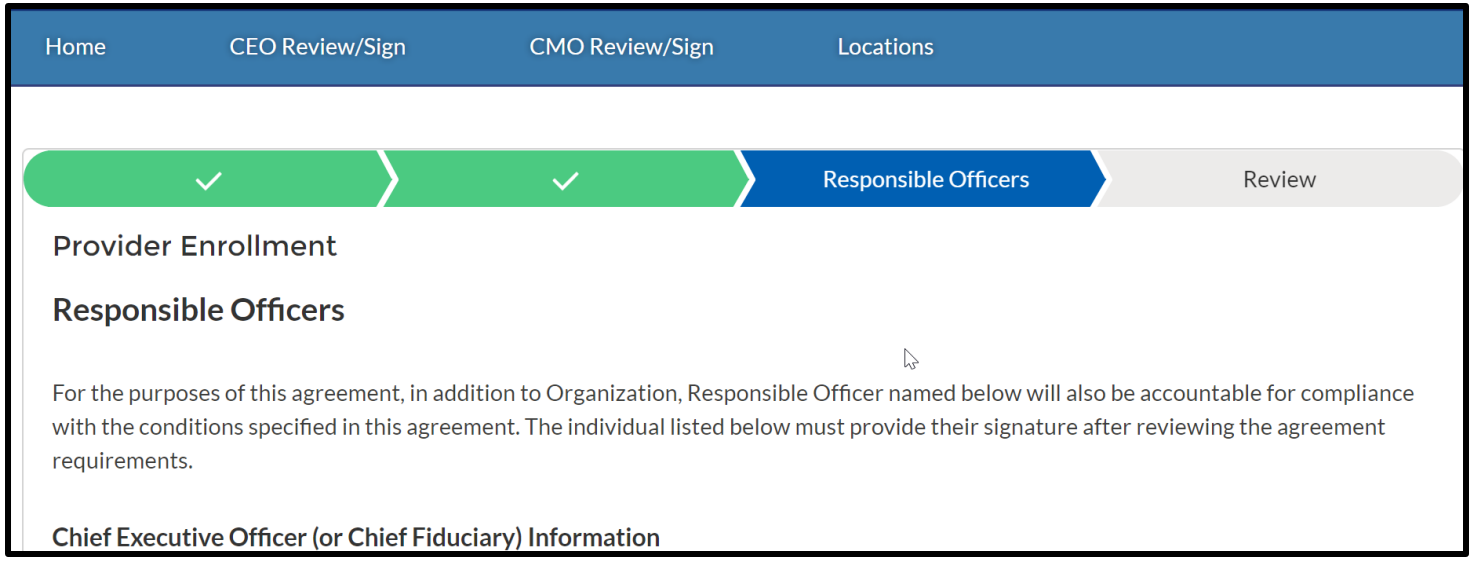
Enter your information if you will also be the CMO of your Organization.

# Step 6 of 7: Complete CEO Information

After entering the CMO details, you will be directed to enter your **CHIEF EXECUTIVE OFFICER** (CEO) Information on the Responsible Officers page.

You will see the same **SEND REQUEST FOR SIGNATURE** checkbox. This will immediately generate an email to the CEO requesting their approval and signature. **WE RECOMMEND THAT YOU DO <u>NOT</u> SELECT THIS BOX AT THIS TIME.**

1. Enter **ALL CEO DETAILS**




**Audience**

**Organization Administrator**

**Tips**

If you do not check the **send request for signature now** checkbox, the CEO will be notified once all vaccine coordinators complete Section B of the Provider Enrollment Agreement.

Enter your information if you will also be the CEO of your Organization.

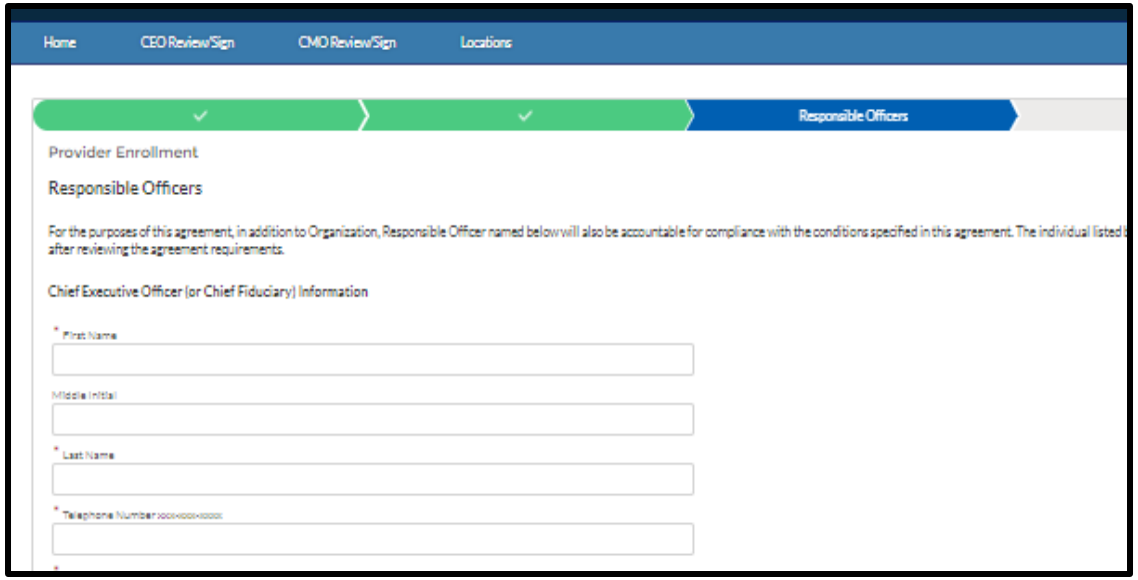
# Step 7 of 7: Complete Section A

Once all CEO details are entered, you are ready to **COMPLETE SECTION A**.

If you need to make any changes before completing Section A, use the **PREVIOUS BUTTON** to go back and **MAKE UPDATES**.

After submitting Section A, you will be reminded to complete Section B for all identified locations.

1. Confirm that **DETAILS ARE CORRECT**
2. Once the CEO page is complete, click **NEXT**

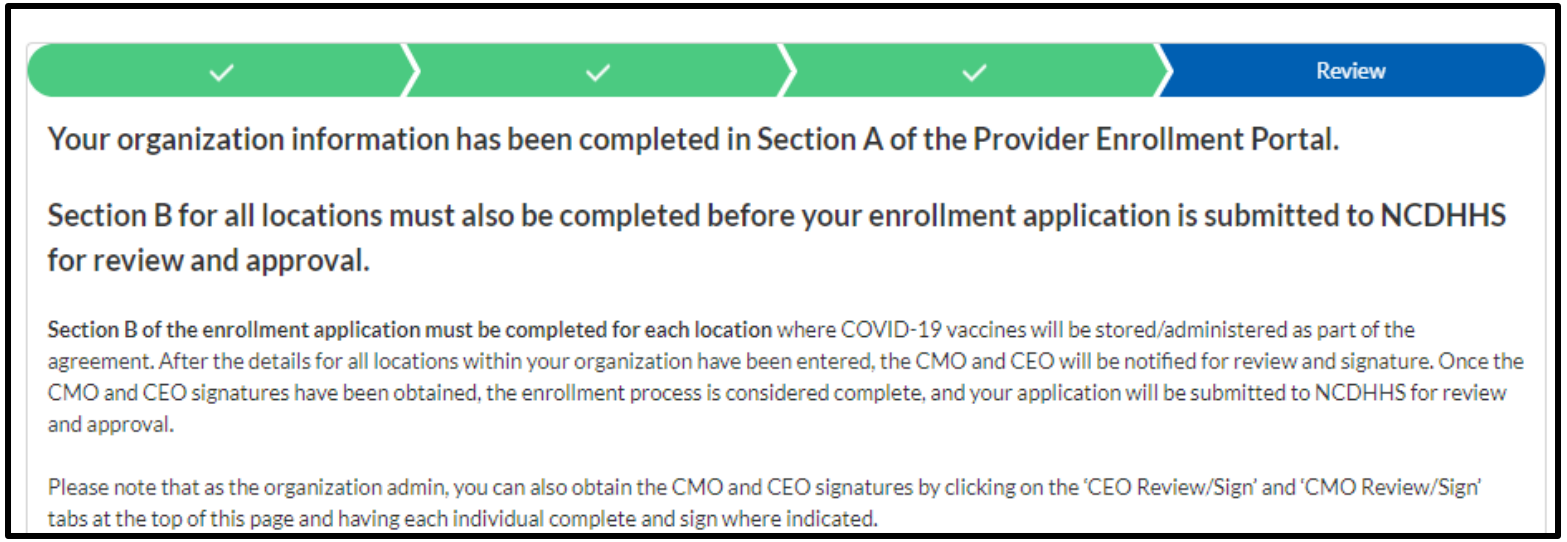



**Audience**

**Organization Administrator**

# Next Steps

Section A has been completed. Click on the links on the following pages to learn more about next steps to enroll and onboard to North Carolina's COVID-19 vaccination program.

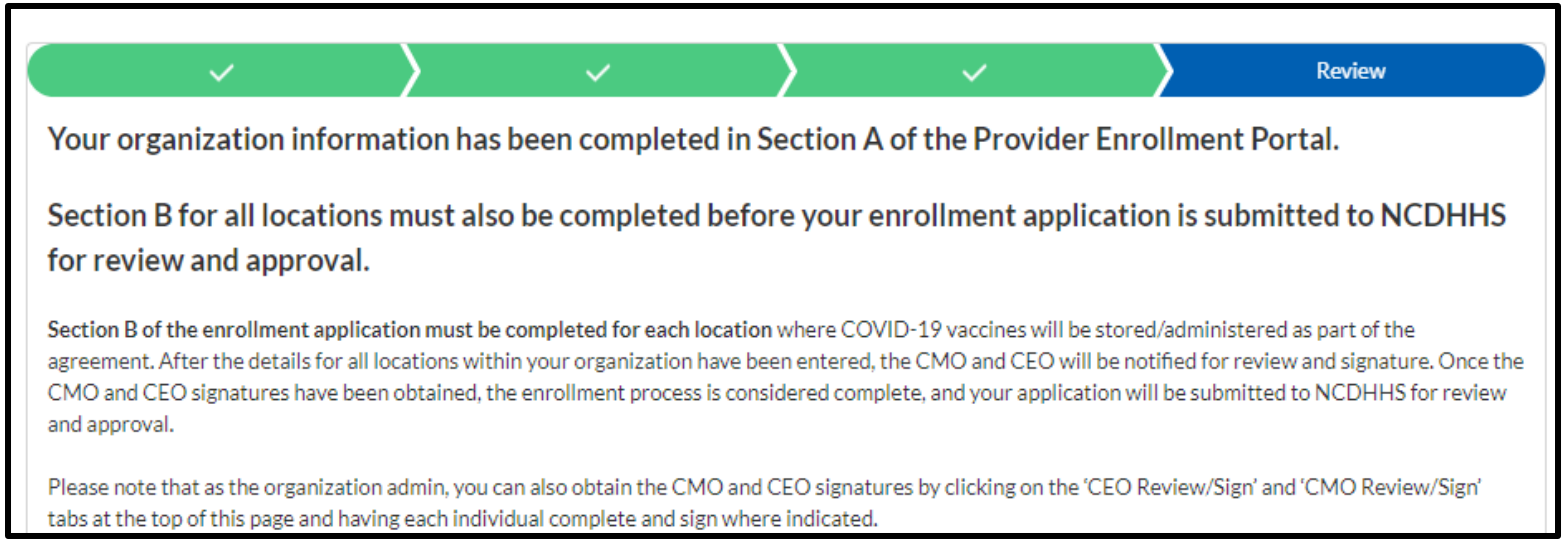



**Audience**

**Organization Administrator**

# Next Steps

Section A has been completed. Click on the links on the following pages to learn more about next steps to enroll and onboard to North Carolina's COVID-19 vaccination program.



Review

Your organization information has been completed in Section A of the Provider Enrollment Portal.

Section B for all locations must also be completed before your enrollment application is submitted to NCDHHS for review and approval.

**Section B of the enrollment application must be completed for each location** where COVID-19 vaccines will be stored/administered as part of the agreement. After the details for all locations within your organization have been entered, the CMO and CEO will be notified for review and signature. Once the CMO and CEO signatures have been obtained, the enrollment process is considered complete, and your application will be submitted to NCDHHS for review and approval.

Please note that as the organization admin, you can also obtain the CMO and CEO signatures by clicking on the 'CEO Review/Sign' and 'CMO Review/Sign' tabs at the top of this page and having each individual complete and sign where indicated.

**Audience**

**Organization Administrator**

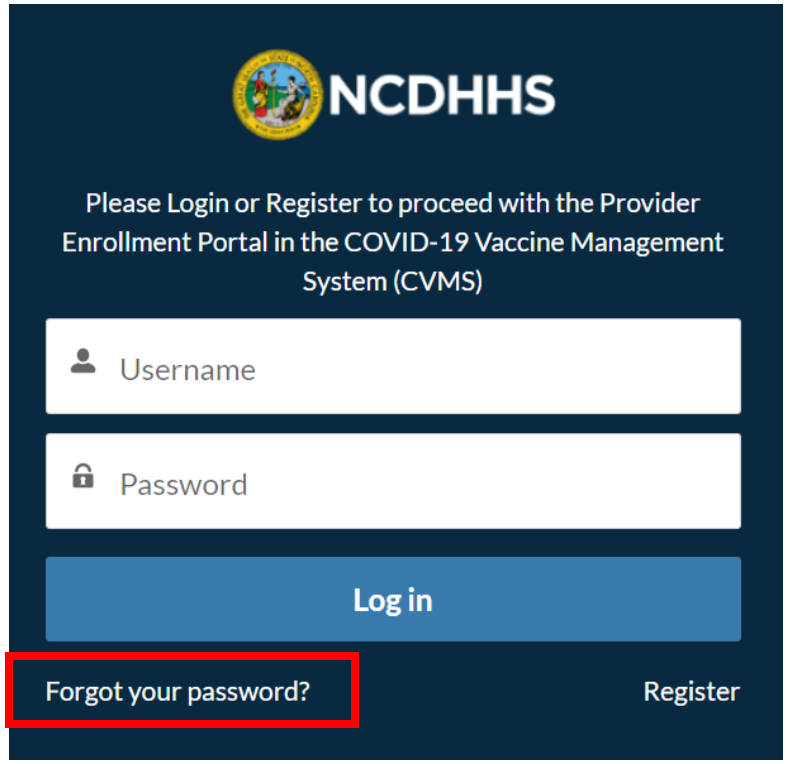
# Appendix

# Reset Password

# Step 1 of 4: Initiate Password Reset

You will be able to reset your password at any time.

1. Navigate to **CVMS PROVIDER ENROLLMENT PORTAL** (https://covid-enroll.ncdhhs.gov/)
2. Click the **FORGOT YOUR PASSWORD?**



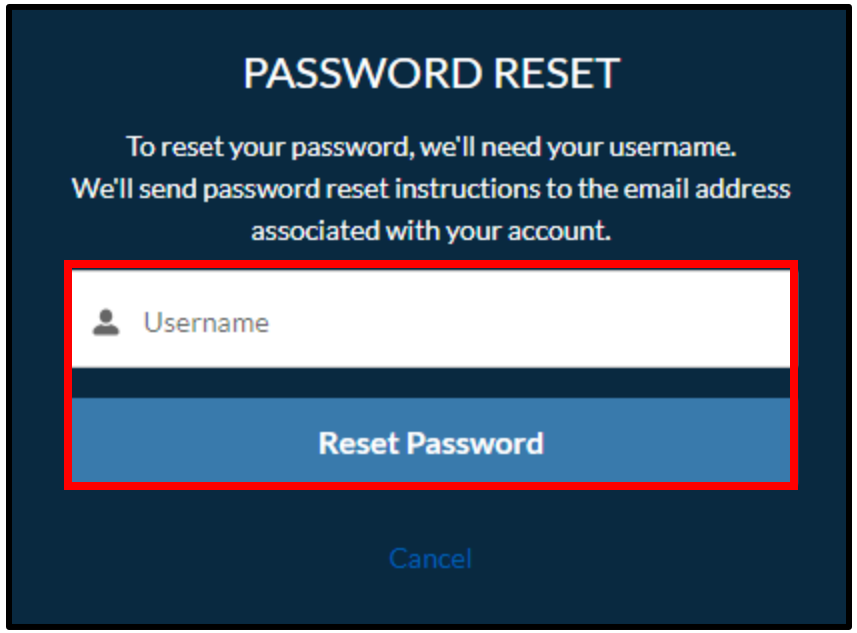

**Audience**

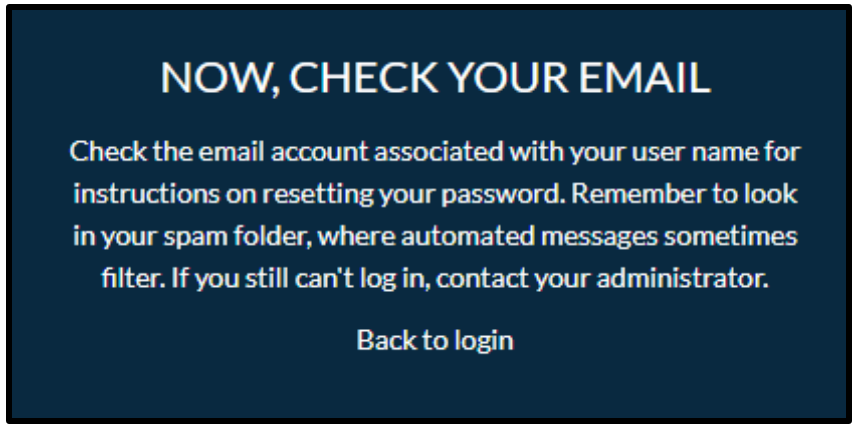
- Organization Administrator
- Vaccine Coordinator
- CEO
- CMO

**Tips**

Consider using a password manager to keep your password if your organization's security policy allows it.

# Step 2 of 4: Trigger Email to Reset Password




You will be prompted to enter your **USERNAME**. You can expect an email from COVIDenroll@dhhs.nc.gov with a link to reset your password.

1. **ENTER YOUR USERNAME**. In most cases, this will be the email address you used to register your account
2. Click **RESET PASSWORD**
3. You will be directed to a page that says **NOW, CHECK YOUR EMAIL**

**Audience**

- Organization Administrator
- Vaccine Coordinator
- CEO
- CMO

**Tips**

Check the spam/junk folder of your email account if you do not receive a password reset email.

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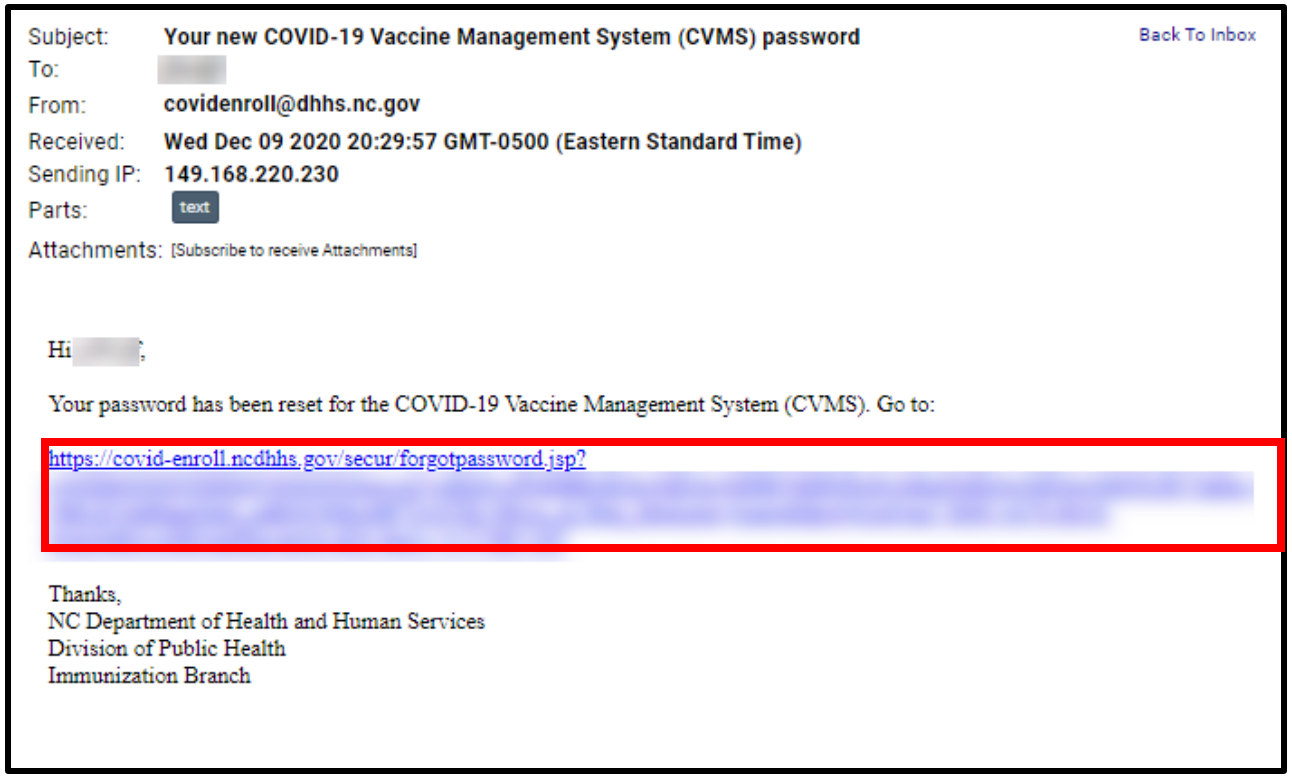
# Step 3 of 4: Check Password Reset Email

You will be sent an email with a **LINK TO RESET YOUR PASSWORD**.

1. **CHECK YOUR EMAIL INBOX**
2. Check your **SPAM OR JUNK FOLDER** if the email does not appear in your inbox
3. Open the email
4. **CLICK THE LINK** in the email



Subject: **Your new COVID-19 Vaccine Management System (CVMS) password** Back To Inbox
To:
From: **covidenroll@dhhs.nc.gov**
Received: **Wed Dec 09 2020 20:29:57 GMT-0500 (Eastern Standard Time)**
Sending IP: **149.168.220.230**
Parts: text
Attachments: [Subscribe to receive Attachments]

Hi ;

Your password has been reset for the COVID-19 Vaccine Management System (CVMS). Go to:

https://covid-enroll.ncdhhs.gov/secur/forgotpassword.jsp?

Thanks,
NC Department of Health and Human Services
Division of Public Health
Immunization Branch

## Audience

- Organization Administrator
- Vaccine Coordinator
- CEO
- CMO

## Tips

Contact the **COVID-19 Vaccine Help Desk** if you do not receive an email (see slide 2 of this User Guide for contact information).

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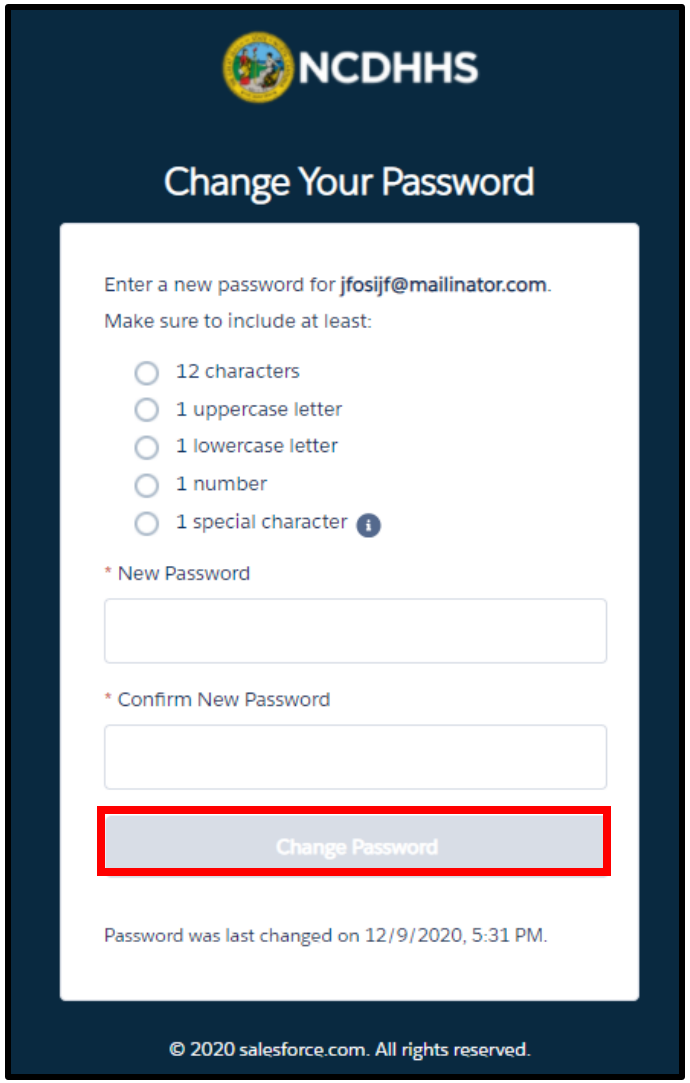
# Step 4 of 4: Complete Password Reset




You will be directed to a page where you can reset your password.

1. Enter a **NEW PASSWORD** that meets the **PASSWORD CRITERIA**
2. Enter the same password under **CONFIRM NEW PASSWORD**
3. Click **CHANGE PASSWORD**
4. If you have successfully reset your password, you will be routed to the CVMS Provider Enrollment Portal

## Audience

- **Organization Administrator**
- **Vaccine Coordinator**
- **CEO**
- **CMO**

## Tips

The Change Password will change color when all requirements have been met.

# 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, Edge Chromium, or Safari 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) are not compatible with CVMS.

# User Guide Change Log

| Version | Date of Change | Changes Made | Author |
|---|---|---|---|
| 1 | 12/10/2020 | • Original version | Kevin Kauffman |
| 2 | 12/31/2020 | • Removed link to the Provider Enrollment portal | Simon Couderc |
| 3 | 01/08/2021 | • Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information. | Courtney Seward |
| 4 | 01/13/2021 | • Replaced screenshots with updated Provider Enrollment Portal branding | Kechia Scott |
| 5 | 02/11/2021 | • Took out any mention of the covidhelp email | Courtney Seward |
| 6 | 03/09/2021 | • Updated organization approval requirements | Azalea Troche |
| 7 | 04/13/2021 | • Updated text for Section A completion; added update on automatic email notification sent for approved locations | Azalea Troche |
| 8 | 04/23/2021 | • Updated organization approval email screenshot | Kevin Kauffman |
| 9 | 05/19/2021 | • Included location enrollment status overview<br>• Added resubmission guidance | Kevin Kauffman |
| 10 | 07/27/2021 | • New user guide version | Vanessa Kemajou |
| 11 | 08/26/2021 | • Held Desk references Updated | Kaitlin Gates |
| 12 | 09/15/2021 | • Held Desk hours Updated | Kaitlin Gates |