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

Step 4 - Create user accounts for your organization's CVMS users

User Guide

Version 12

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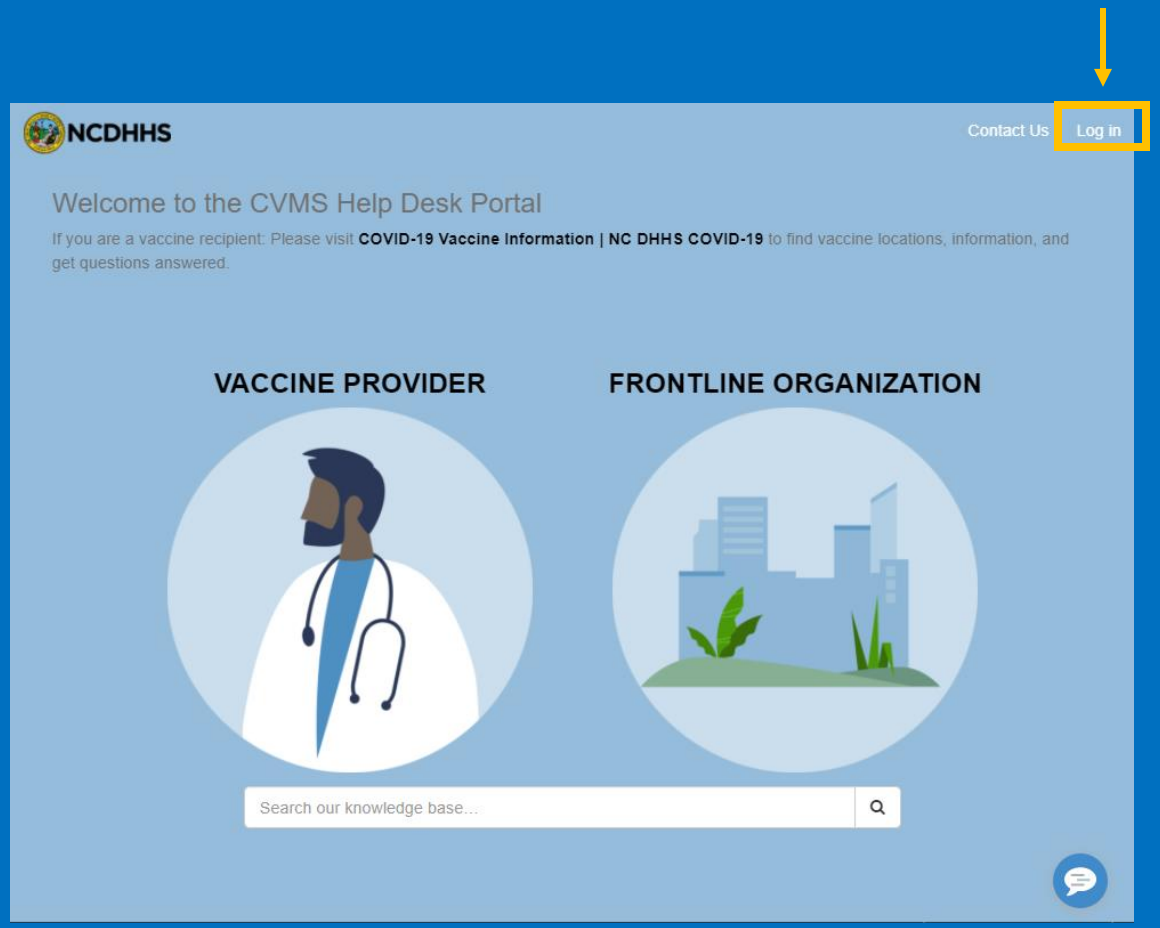
NC DEPARTMENT OF HEALTH AND HUMAN SERVICES



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 **Log in** 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 '**Log in**' 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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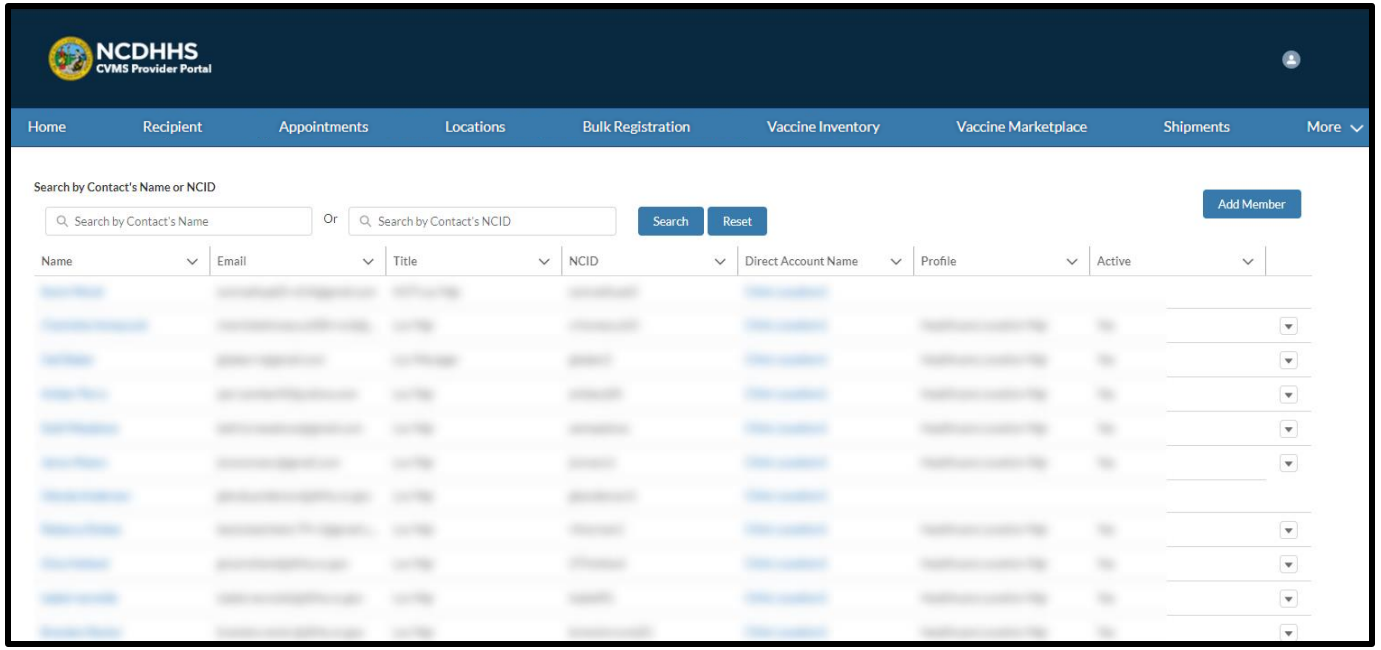
Overview

Overview

In this user guide, we will review User Account Management. **User Accounts Management** will allow you to create and onboard new users to the CVMS Provider Portal. You will be able to:

- Search and create CVMS Provider Portal user accounts
- Edit user account details and profiles
- Add / remove locations to a user account
- Deactivate user accounts



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

Additionally, you will need to:

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

Now, let's get started!

Four User Profiles are Available

Healthcare Location Manager
The Healthcare Location Manager is an available user profile for the CVMS Provider Portal. This profile gives Healthcare Location Managers permission to access the following tabs: Home, Recipient, Appointments, Bulk Registration, Vaccine inventory, Shipments, Reports, Account Management, Organization Management, and Help & Information. Healthcare Location Managers are in charge of managing user accesses for their location(s), manage the inventory, access reports, upload recipients, and everything a Healthcare Provider can do. There is always at least one user with a Healthcare Location Manager profile per vaccine provider account.

Healthcare Provider
The Healthcare Provider is another available user profile for the CVMS Provider Portal. This profile gives Healthcare Providers permission to access the following tabs: Home, Recipient, Appointments, and Help & Information. This user can register a recipient, book an appointment, check the recipient in, log an administration of a Vaccine.

Healthcare Provider Read-Only
The Healthcare Provider Read-Only profile gives users permission to access the following tabs: Recipient, Account Management, and Help & Information. This role allows a provider to check a recipient's information, vaccination and to create other users with a Read-Only profile.

Statewide Location Manager
This profile was created for surge staff, National Guard resources, or other statewide support to reinforce any vaccine provider. This profile allows them to access all active vaccine provider locations in the State and is therefore limited to a select population.

List of features available per profile

	Healthcare Location Manager	Healthcare Provider	Healthcare Provider Read-Only	Statewide Location Manager
Search recipients	✓	✓	✓	✓
Register new recipient records	✓	✓		✓
Edit Recipient Records	✓	✓		✓
Check-in recipient	✓	✓		✓
Cancel appointment	✓	✓		✓
Log a vaccine administration	✓	✓		✓
Modify or cancel a vaccine administration	✓	✓		✓
Book an appointment using the scheduling feature (only if feature was activated)	✓	✓		✓
Manage Inventory (add, declare wastage, edit, transfer)	✓			
List your extra or solicit wanted vaccines in the marketplace	✓			
Manage Location details published on vaccination site locator at vaccines.gov	✓			
Activate and setup the vaccine appointment feature	✓			
Manage User accounts (add, remove, access to multiple locations)	✓		✓	✓
Access Reports	✓			
Give Frontline organizations access to the CVMS Organization Portal	✓			
Access Help & Information, Chatbot	✓	✓	✓	✓
Switch to other locations (if access granted to more than one location)	✓	✓	✓	✓
Access to all the Provider Accounts				✓

Account Management Overview

The Account Management process enables Healthcare Location Managers to onboard staff or individuals that require access to the CVMS Provider Portal. Before starting this process, make sure to collect NCID usernames and valid email addresses for each user who requires a CVMS Provider Portal account.

1

Navigate to the Account Management tab in the CVMS Provider Portal.

Healthcare Location Managers can onboard authorized staff or individuals and provide access to the CVMS Provider Portal through the self-service Account Management tab.

2

Click Add New Member. Populate and save the HCP Provider Portal Contact record.

You will be required to enter the first name, last name, profile, NCID username and associated email address for each user.

Make sure to check that the NCID username was created using the associated email address.

3

After clicking Save, an automatic email will be sent to the users inviting them to sign into their CVMS Provider Portal account and start performing their applicable activities.

As a Healthcare Location Manager, you will be able to edit the assigned profile and NCID username if you need to correct any information.

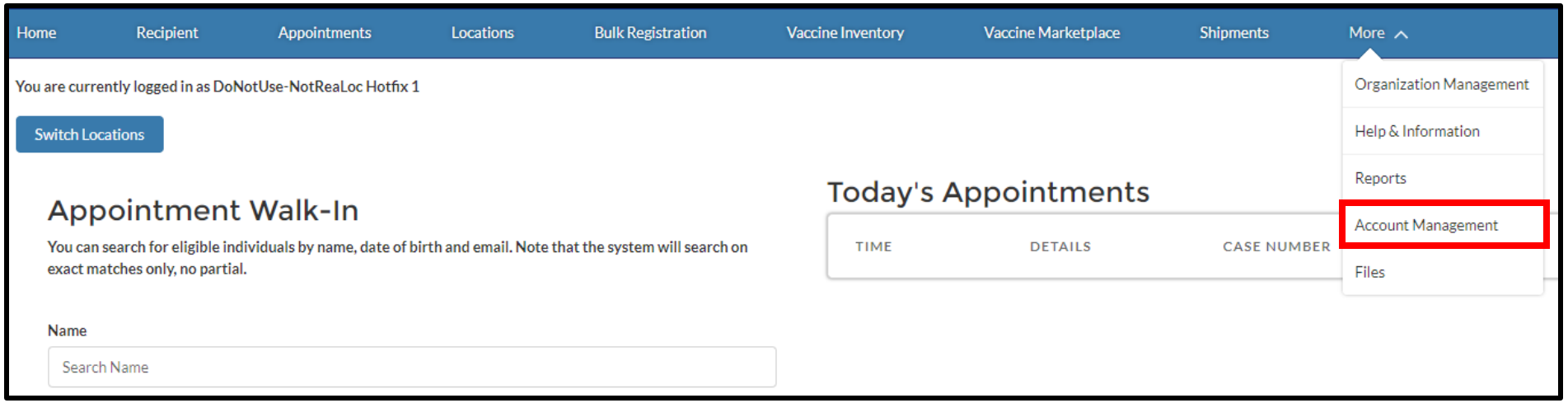
Create a New User Account

Step 1 of 7: Navigate to Account Management Tab

Before beginning the Account Management process, collect the first name, last name, email address, and NCID usernames for the individuals you want to add as users in the CVMS Provider Portal. You will need an NCID username for each person to add them to the CVMS Provider Portal.

Note: The first Healthcare Location Manager for an account is created in the Provider Enrollment process. This first Healthcare Location Manager will then be able to add and manage additional users in the CVMS Provider Portal.

1. From the homepage, click **MORE**
2. Click the **ACCOUNT MANAGEMENT** tab from the drop down



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Healthcare Location Manager

Tips

You will only be able to onboard individuals to the Locations you have access to within your Organization.

Step 2 of 7: Search for an Existing Account

Before you create a new CVMS Provider Portal account for an individual, search for them first to make sure that they do not already have one. If a user record already exists, skip to the **ADD AN EXISTING USER TO YOUR LOCATION** section. If a record does not exist, continue with this step.

1. Search for the user by **NAME OR NCID USERNAME**

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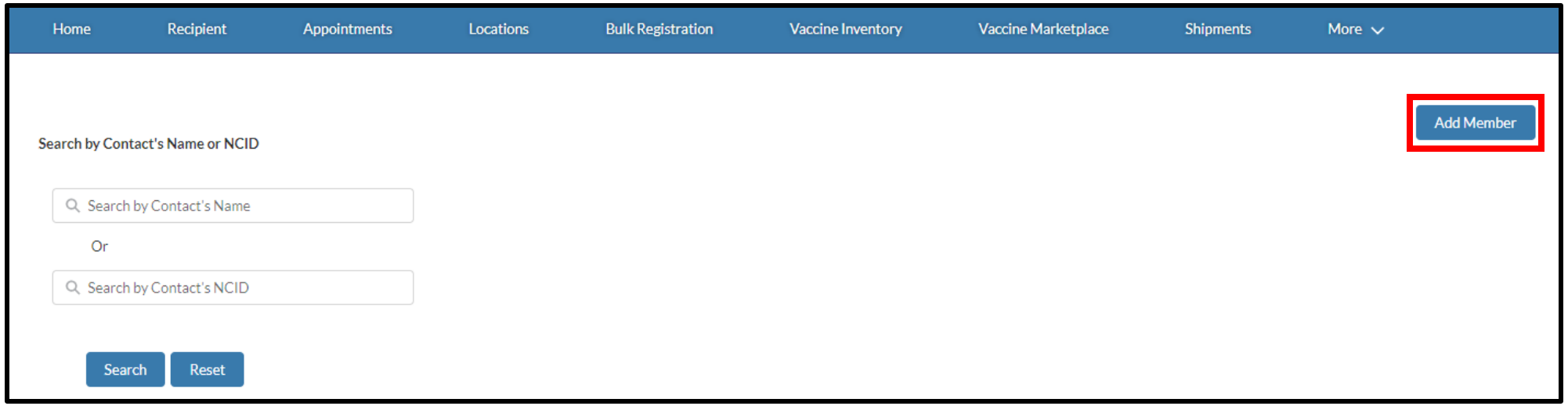
Tips

Do not search both name and NCID simultaneously. The search must be done separately.

Step 3 of 7: Click Add Member

Once you confirm that the individual does not have an existing CVMS Provider Portal account, you can create a CVMS Provider Portal account.

1. Click **ADD MEMBER**



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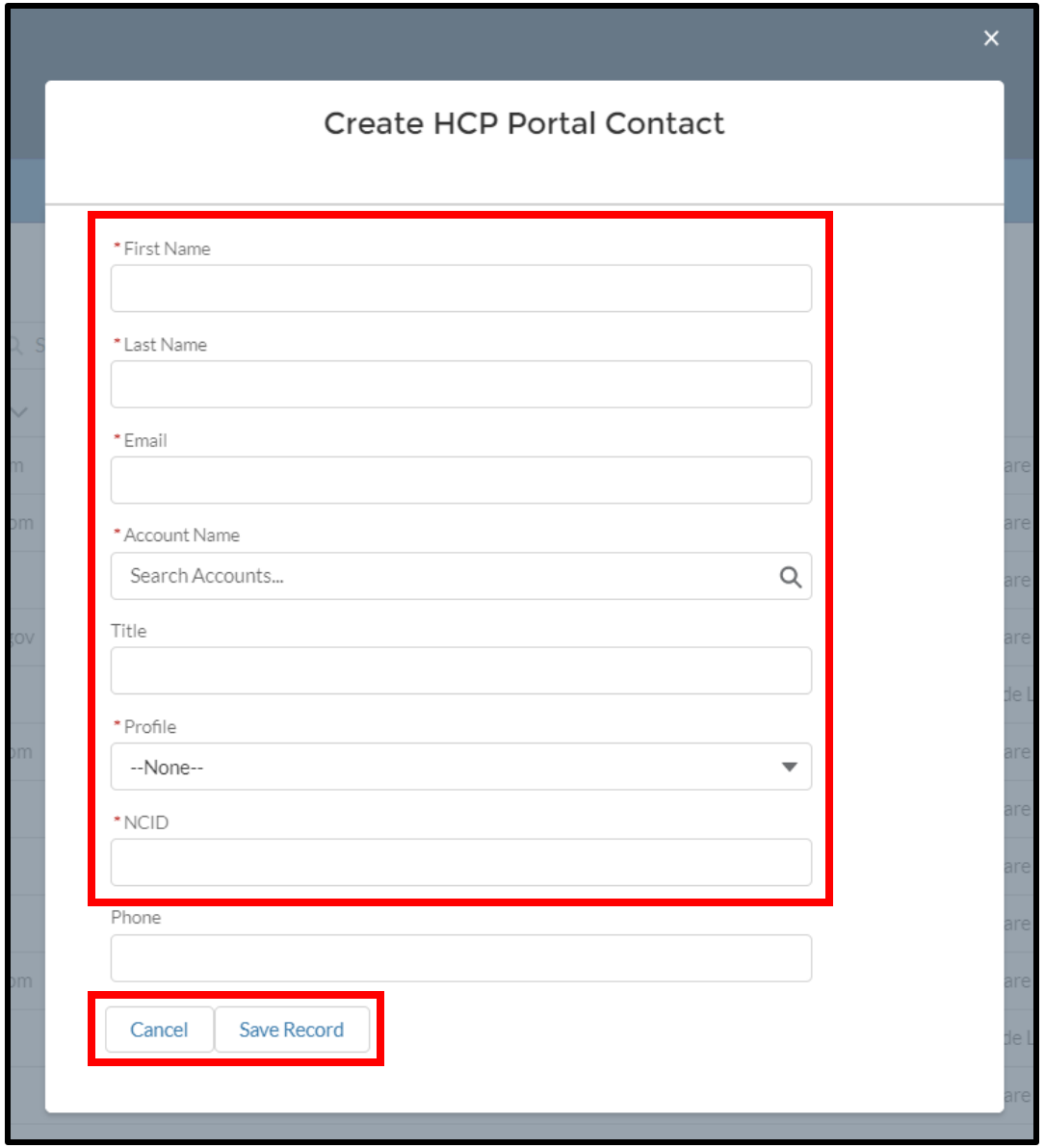
Step 4 of 7: Enter the HCP Portal Contact Details

After clicking **ADD MEMBER**, you will be directed to the Create HCP Portal Contact page. You will be asked to provide the individual's details.

1. Enter **FIRST** and **LAST** name used to register the NCID username
2. Enter **EMAIL ADDRESS** used to register the NCID username
3. Click the **ACCOUNT (LOCATION) NAME** search. Select **ACCOUNT** from the drop down
4. Select a **PROFILE** from the drop-down menu
5. Enter the **NCID USERNAME**
6. Click **SAVE RECORD**



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Healthcare Location Manager

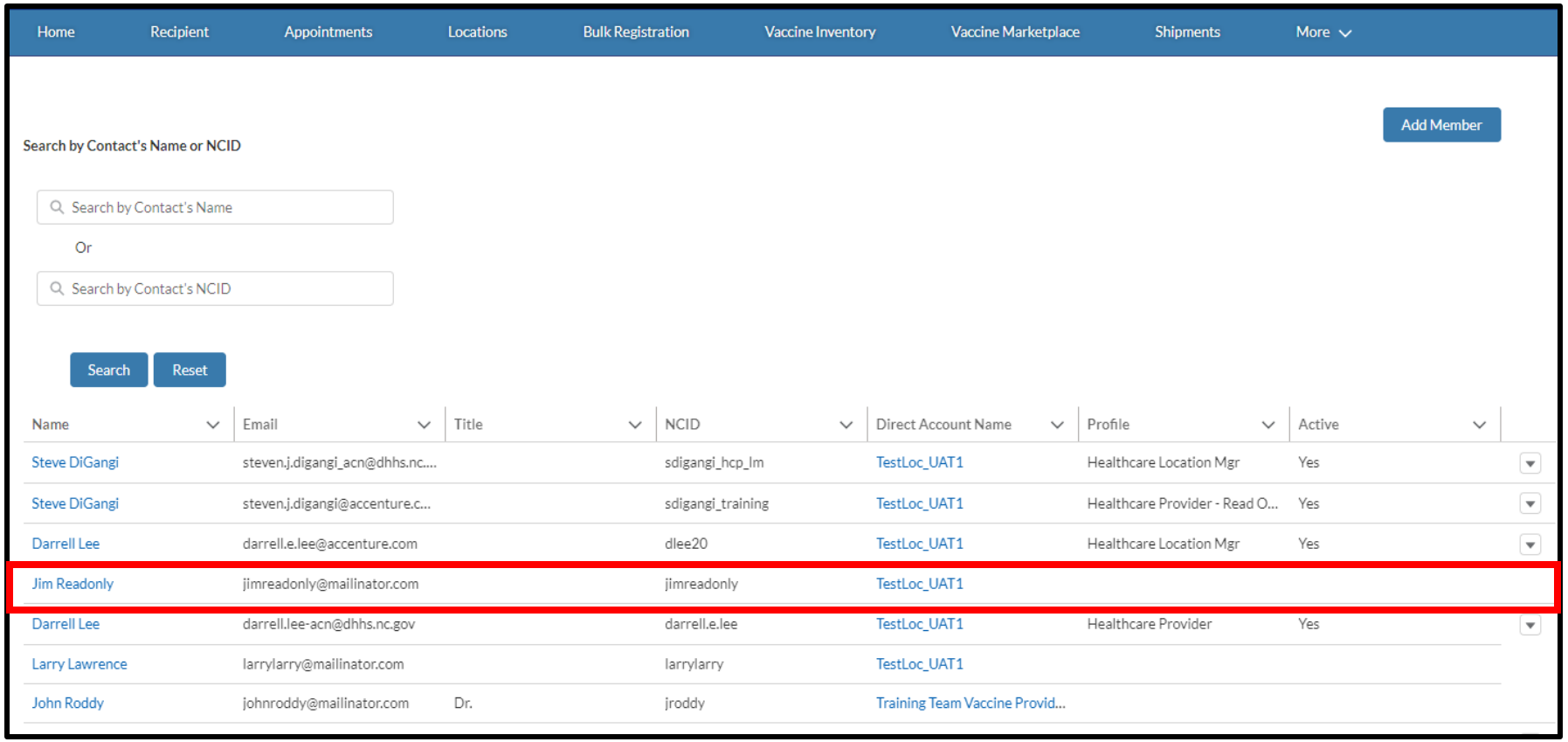
Tips

The PROFILE will allow you to add a user as a Healthcare Provider, Healthcare Location Manager, Statewide Location Manager, or a Healthcare Provider Read-Only (used for those that need to view the system, but not input data).

Step 5 of 7: Search for Individual on the User List

Once you save the new HCP Portal Contact record, you will be directed back to the Account Management tab. You will be able to view the individual's name and NCID username on the list.

1. Click the **NAME**
2. After clicking the Name, you will be directed to the **CONTACT RECORD**



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Tips

The **Profile** and **Active** columns will not update on the list until the newly added user logs into their CVMS Provider Portal account for the first time.

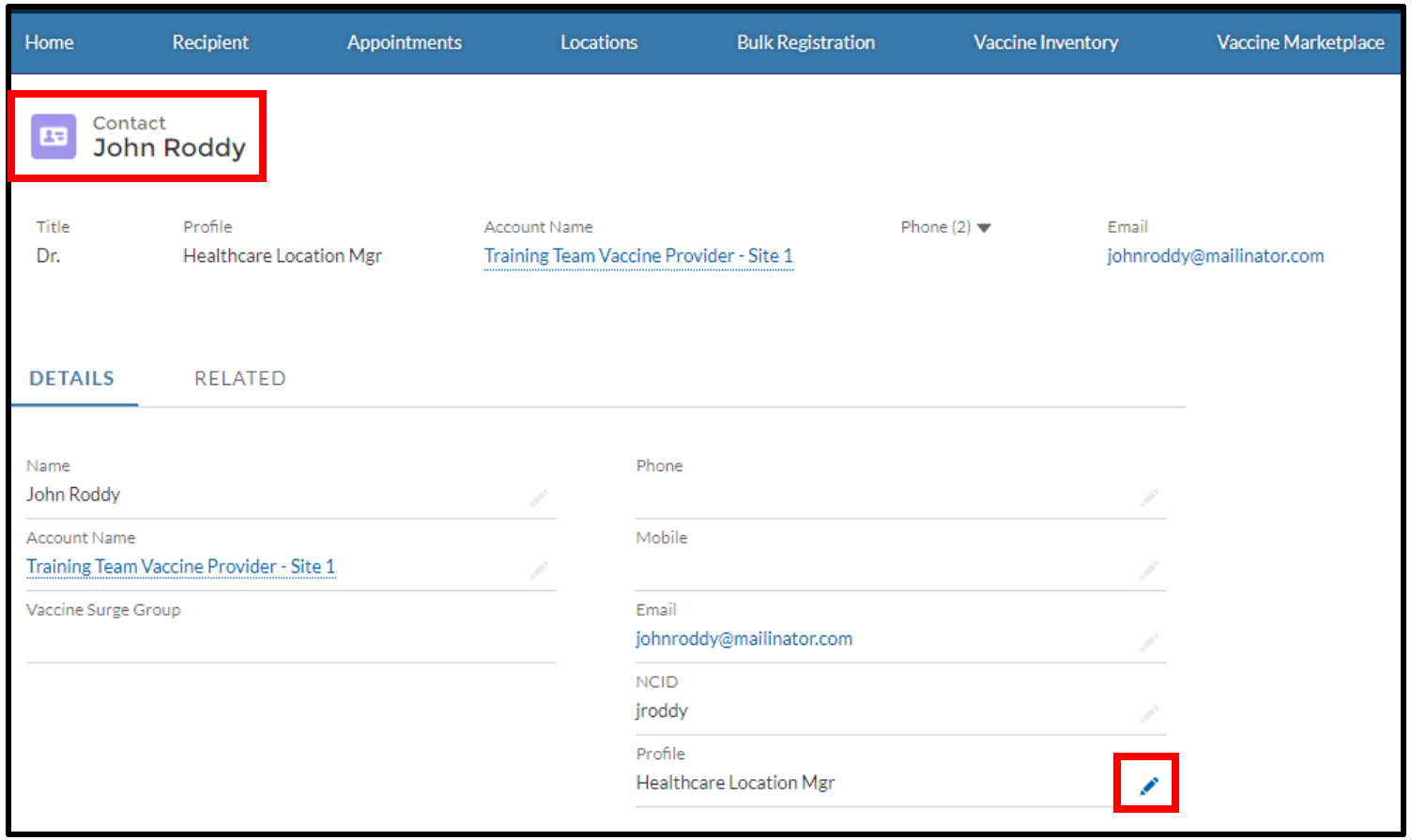
Some of the functions in this user guide are only applicable to active accounts.

Step 6 of 7: Review and Edit the User Contact Record

Each CVMS Provider Portal account has an HCP Portal Contact record. You will be able to review the information you provided and edit the information.

If you need to edit the email address on the Contact record, see the Appendix for further instructions.

1. Click the **PENCIL ICON** next to the field you wish to edit
2. Make the changes
3. Click **SAVE**



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Healthcare Location Manager

Tips

By editing the Profile field, you will be updating the permissions for the individual's CVMS Provider Portal account.

If the e-mail address is edited, the system will automatically send an invitation e-mail to the new e-mail address provided.

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Step 7 of 7: Automatic Email Notification Sent to the User

After the HCP Portal Contact record is created, an automatic email is sent to the email address provided inviting the individual to sign into their CVMS Provider Portal account.

Hi Lisa,

Welcome to the COVID-19 Vaccine Management System (CVMS).

To get started, go to https://covid-vaccine-provider-portal.ncdhhs.gov you will be redirected to the NCID sign on page, enter your NCID and password and select NCID Login. You will then be automatically logged into the CVMS Provider Portal.

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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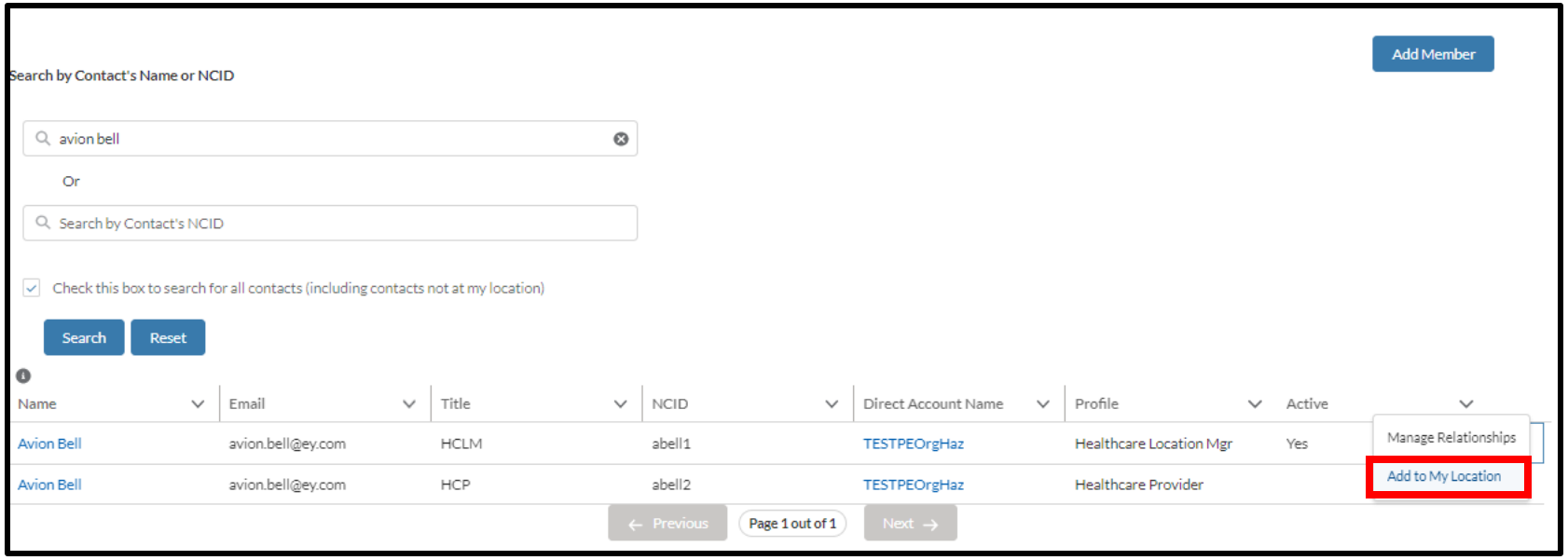
Healthcare Location Manager

Add an Existing User to Your Location

Add an Existing User to Your Location

If an active user already exists within CVMS, you do not have to create a new account for them to add them to your location.

1. Search for the user
2. Hover over the arrow on the right-hand side in the **ACTIVE** column
3. Click on **ADD TO MY LOCATION**



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Tips

If a user already has an active CVMS Provider Portal account associated with another location, adding them to your location will not overwrite their previous access. They will simply be added to your location as well.

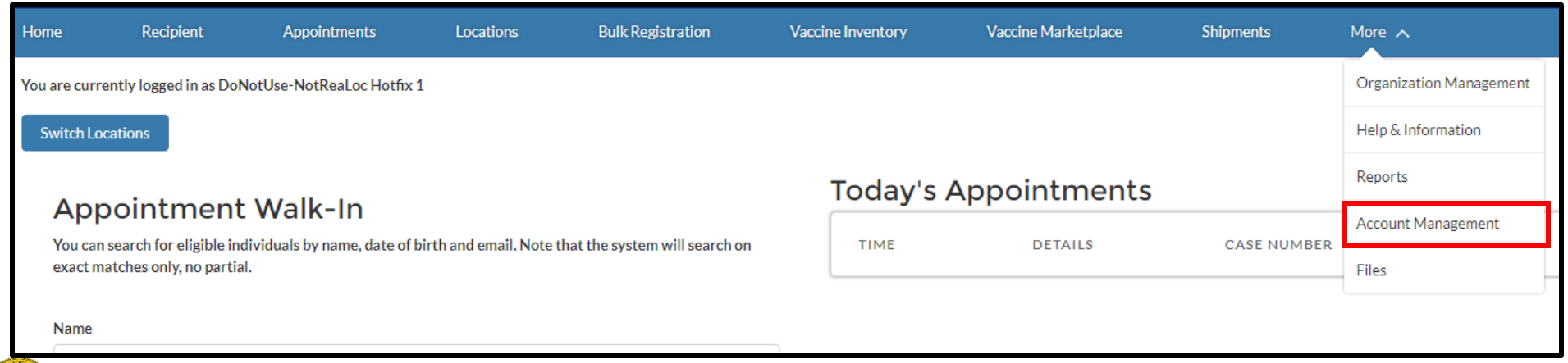
Bulk Upload New User Accounts

Step 1 of 7: Navigate to Account Management Tab

Before beginning the Account Management bulk upload process, collect the first name, last name, email address, NCID username, and profile type for the individuals you are onboarding. You will need a valid NCID username for each user to onboard them to your location in the CVMS Provider Portal.

Note: All users added through this process will be associated with the location to which you are currently logged-in. If you need to add user relationships with multiple locations, you will have to edit the individual records after they have been uploaded.

1. From the homepage, click **MORE**
2. Click the **ACCOUNT MANAGEMENT** tab from the drop down



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Tips

If a user already has a CVMS Provider Portal account associated with another location, adding them via the bulk upload process will not overwrite their previous access. They will simply be added to your location as well.

Step 2 of 7: Access the Bulk HCP Upload Template

1. Carefully read the instructions
2. Click on the **BULK HCP UPLOAD TEMPATE** hyperlink

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

Instructions for Healthcare Provider Bulk Upload

1. To provide access to multiple users at one time, please use the Bulk HCP Upload template. The template requires first name, last name, NCID username, email address and profile type for each person on your list. **Note: Profile Names need to be spelled exactly as specified or the upload will fail.**
   a. Profile types:
      i. A Healthcare Provider is responsible for Recipient check-in, point-of-care Recipient registration, Recipient eligibility verification, and vaccine administration detail capture.
      ii. A Healthcare Location Mgr is responsible for viewing, receiving, and adding inventory, viewing orders and shipment details, viewing and updating vaccine inventory levels, managing location inventory, performing Recipient bulk upload, managing Scheduling of appointments (optional), adding / managing / deactivating HCP Users, adding frontline organizations, reviewing reports, and additionally – all of the activities that a Healthcare Provider can do.
   b. If you have users that do not have an NCID, have them follow these instructions to obtain one.
2. Enter the required fields for every healthcare provider who needs access to the portal. Only 100 users can be uploaded at a time. If your list contains more than 100 users, please create a second document using the Bulk HCP Upload Template.
3. Once you have entered all the information in the Bulk HCP Upload Template, save the file as a .csv file.
4. Submit one file at a time by dragging and dropping the .csv file into the box below. A popup will appear to tell you if your upload was successful and if any records failed to upload.
   a. If upload fails: You will get an immediate notification if there are any errors uploading your file.
   b. If any records fail: Your file may have uploaded partially. In this case, you will receive a list by email with a column labeled "Error" which identifies the issue with each failed record. Once you have resolved all the indicated errors, delete the "Error" column and repeat Step 3 to upload the remaining records.
5. Your successfully uploaded records will display on this page below *Search by Contact's Name or NCID.*

Drag and Drop CSV file here

Add Member

Search by Contact's Name or NCID

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Healthcare Location Manager

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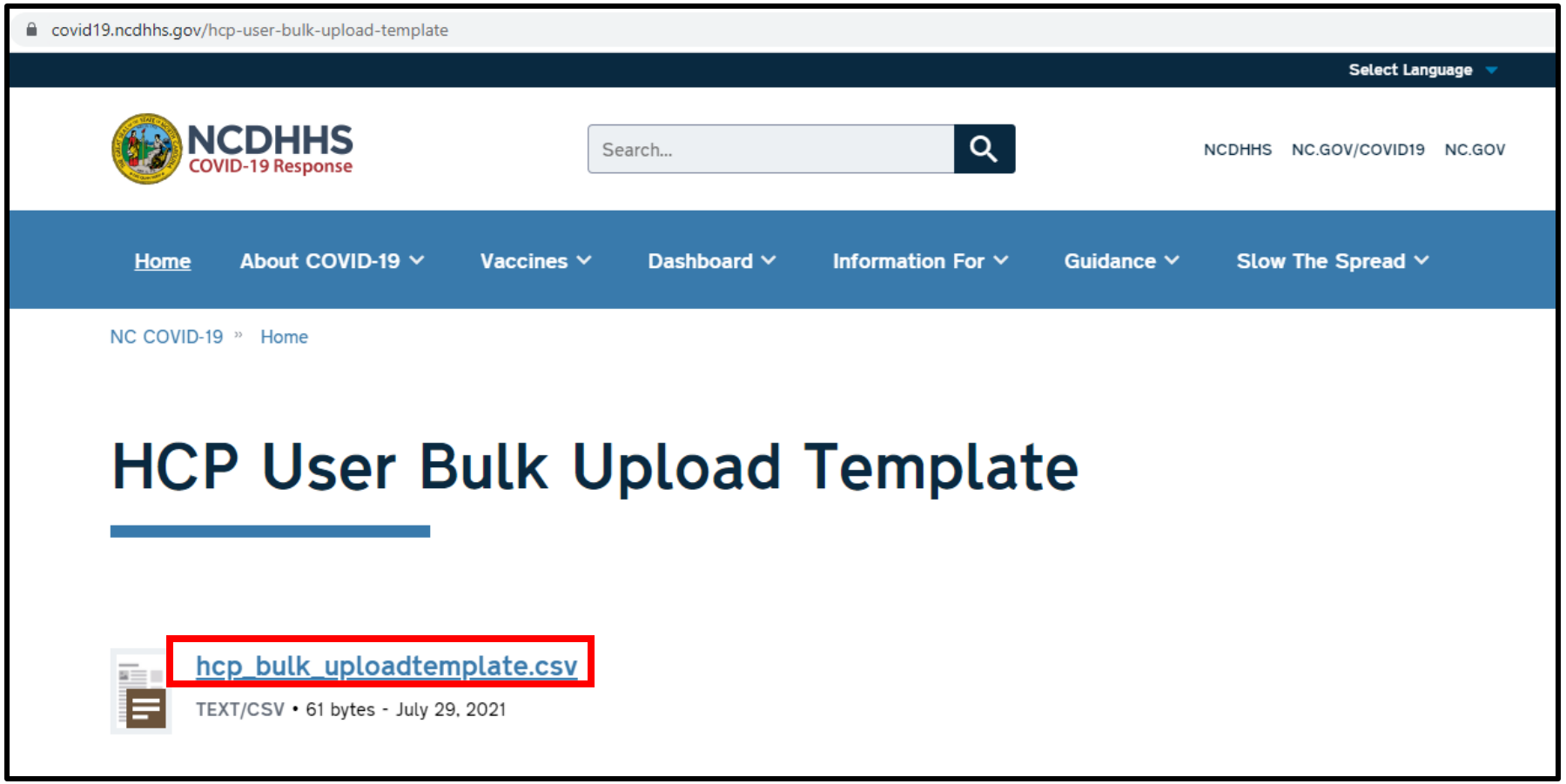
Step 3 of 7: Download the HCP User Bulk Upload Template

The hyperlink will link to an external site which contains the HCP User Bulk Upload Template.

1. Click on the **HCP_BULK_UPLOADTEMPLATE.CSV** hyperlink to begin the automatic download



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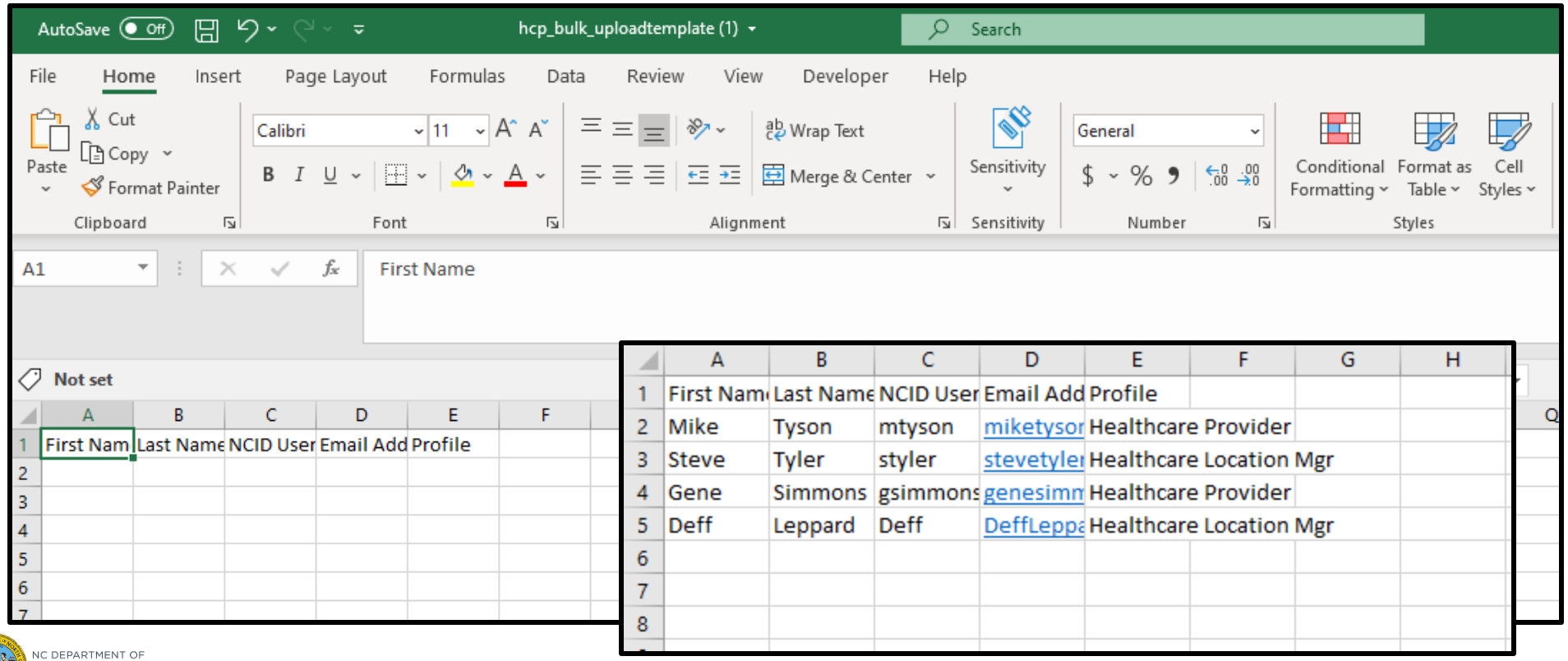
Step 4 of 7: Fill and Save the HCP User Bulk Upload Template

1. Open the .CSV file that was downloaded
2. Enter each field for the users you are onboarding

Note**: You must enter the **PROFILE** field exactly as listed (non-case sensitive): **Healthcare Provider** or **Healthcare Location Mgr

3. Save the file to your computer



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Tips

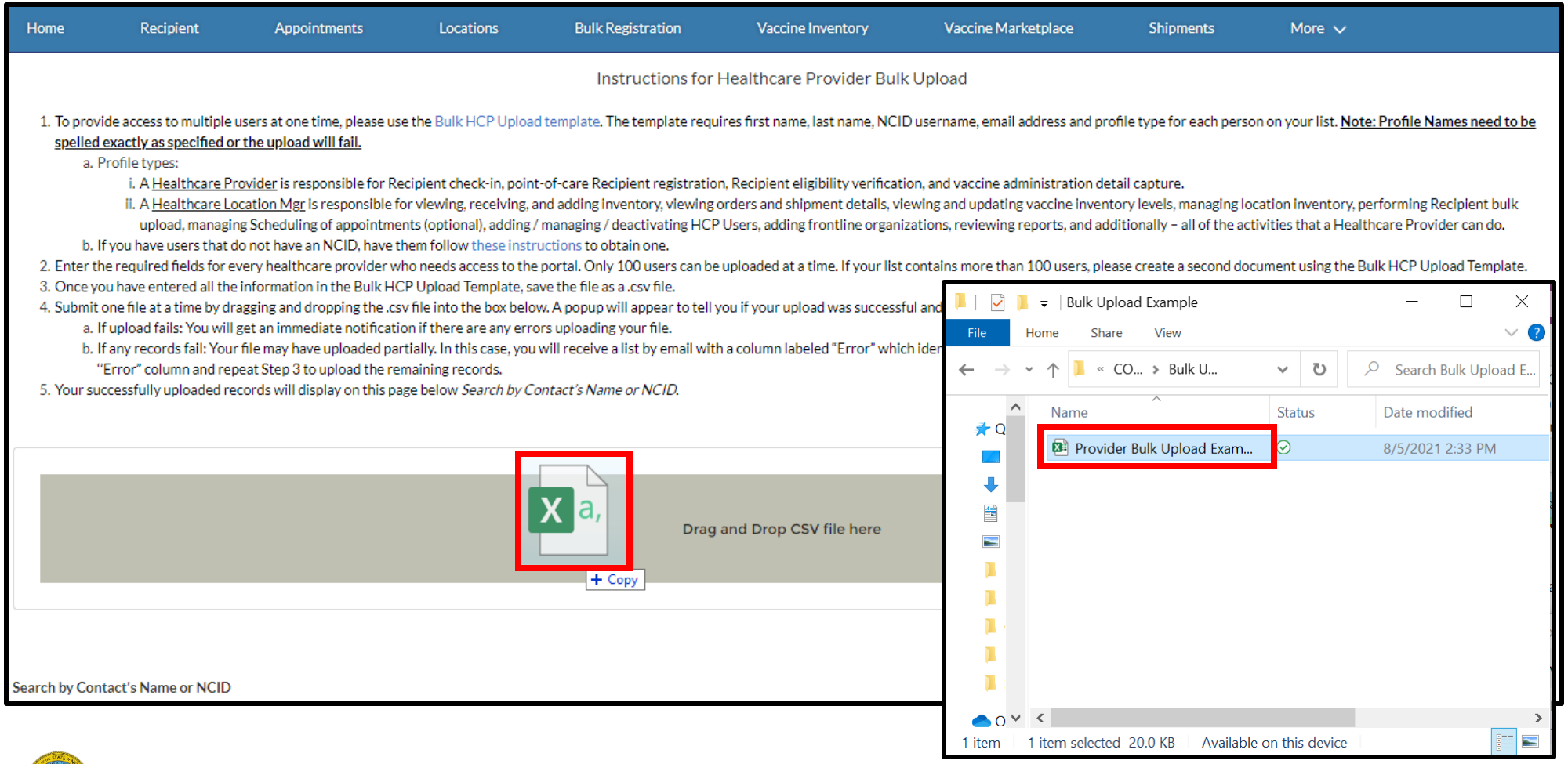
If you can't find the downloaded file, check the **DOWNLOADS** folder on your computer.

You cannot create users with the Healthcare Provider Read-Only profile via the Bulk Upload process. They must be created individually.

Step 5 of 7: Drop the .CSV File on the Account Management Page

Once the .csv file is saved, you can commence with the upload.

1. Locate the file, drag, and drop the saved file onto the gray drop box on the Account Management page



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Step 6 of 7: Review the Records

CVMS will automatically extract the data from the file and display it for you.

1. Review the records for accuracy
2. Click **CREATE RECORDS**

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

Instructions for Healthcare Provider Bulk Upload

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      ii. A Healthcare Location Mgr is responsible for viewing, receiving, and adding inventory, viewing orders and shipment details, viewing and updating vaccine inventory levels, managing location inventory, performing Recipient bulk upload, managing Scheduling of appointments (optional), adding / managing / deactivating HCP Users, adding frontline organizations, reviewing reports, and additionally – all of the activities that a Healthcare Provider can do.
   b. If you have users that do not have an NCID, have them follow these instructions to obtain one.
2. Enter the required fields for every healthcare provider who needs access to the portal. Only 100 users can be uploaded at a time. If your list contains more than 100 users, please create a second document using the Bulk HCP Upload Template.
3. Once you have entered all the information in the Bulk HCP Upload Template, save the file as a .csv file.
4. Submit one file at a time by dragging and dropping the .csv file into the box below. A popup will appear to tell you if your upload was successful and if any records failed to upload.
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   b. If any records fail: Your file may have uploaded partially. In this case, you will receive a list by email with a column labeled "Error" which identifies the issue with each failed record. Once you have resolved all the indicated errors, delete the "Error" column and repeat Step 3 to upload the remaining records.
5. Your successfully uploaded records will display on this page below *Search by Contact's Name or NCID.*

- **hcp_bulk_uploadtemplate.csv** (application/vnd.ms-excel)- 335bytes, last modified: 8/5/2021

FIRST NAME	LAST NAME	NCID USERNAME	EMAIL ADDRESS	PROFILE
Mike	Tyson	mtyson	miketyson@mailinator.com	Healthcare Provider
Steve	Tyler	styler	stevetyler@mailinator.com	Healthcare Location Mgr
Gene	Simmons	gsimmons	genesimmons@mailinator.com	Healthcare Provider
Deff	Leppard	Deff	DeffLeppard@mailinator.com	Healthcare Location Mgr

Create Records | Cancel

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Step 7 of 7: Acknowledge Completion of the HCP User Bulk Upload

Once the records have been created in CVMS, a message will appear at the top of the page letting you know how many failed and successful records were uploaded. If a record fails, a message will display with the reason.

1. Complete the process by clicking **OK**

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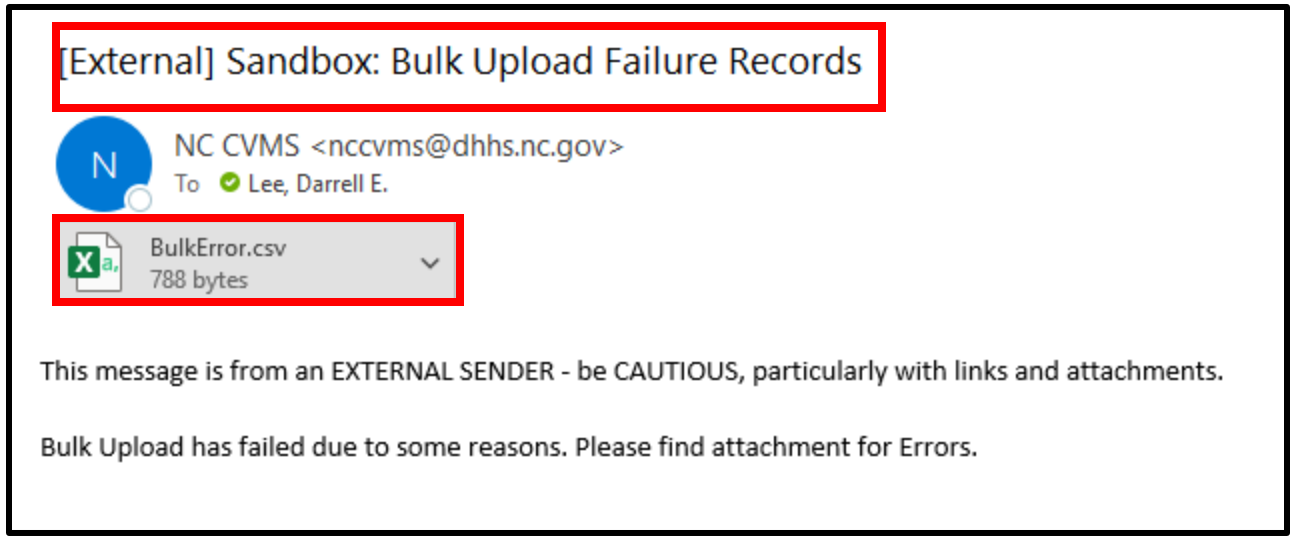
Healthcare Location Manager

Tips

To prevent errors, ensure that you have entered a valid NCID and Profile type as well as a properly formatted e-mail address.

Notification of Failed Records

If there are any failed records, you will receive an e-mail from CVMS containing a .CSV attachment. The attachment will only show the records that failed to get successfully created along with a new column listing the reason for the upload failure. Successfully uploaded records will be not be shown in the file.



	A	B	C	D	E	F	G	H	I	J
1	FirstNam	LastNam	NCID__c	Email	Profile__	Error				
2	Mike	Tyson	mtyson	miketysor	Location	Line 1 : Please enter a valid CVMS Profile				
3	Steve	Tyler	styler	stevetyler	Healthca	Line 2 : Please enter a valid CVMS Profile				
4	Gene	Simmons	gsimmons	genesimm	Provider	Line 3 : Please enter a valid CVMS Profile				
5	Deff	Leppard	Deff	DeffLeppa	Healthca	Line 4 : Please enter a valid CVMS Profile				
6										
7										

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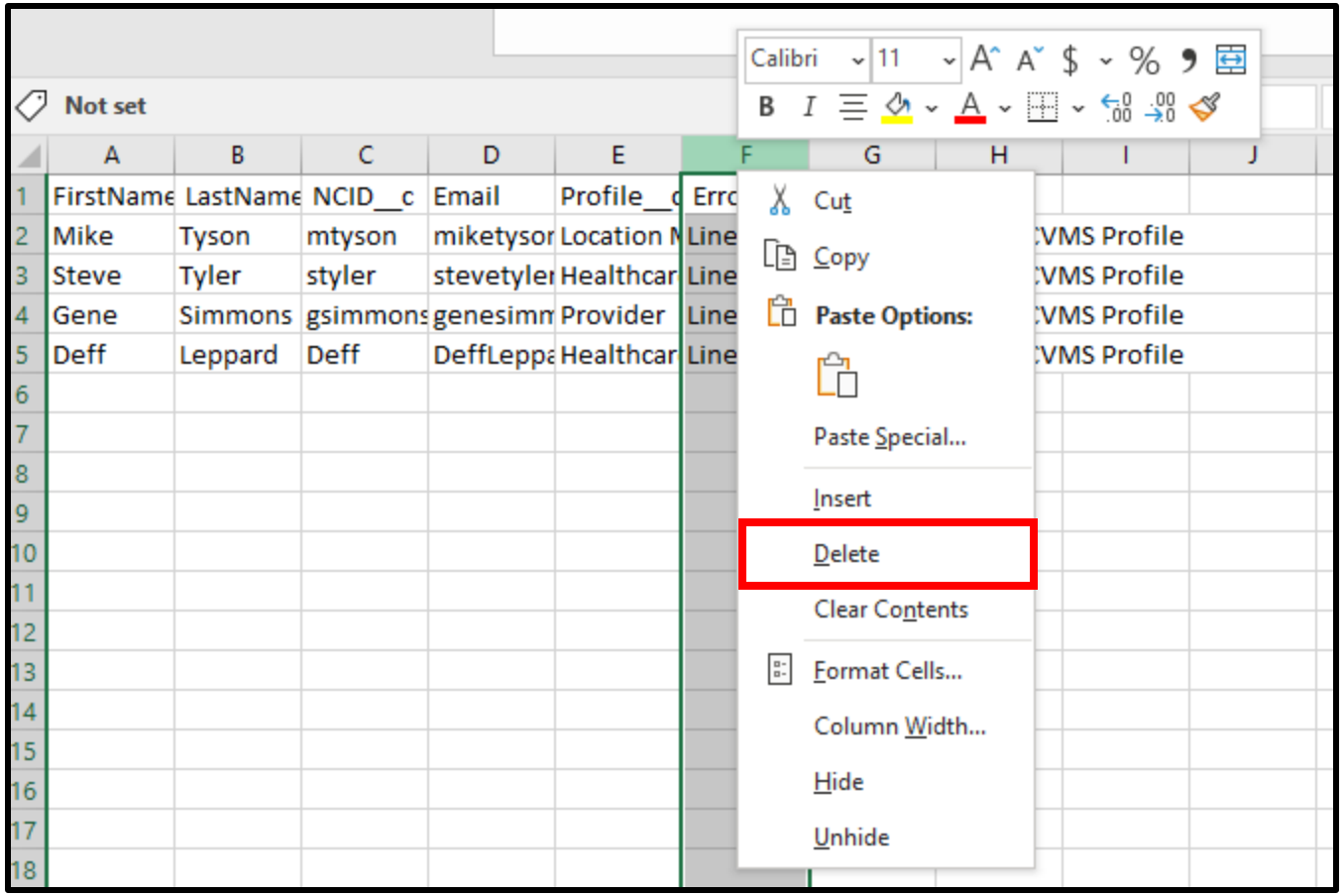
Correcting Failed Records for Re-upload

1. Correct the deficiency
2. Delete the **ERROR:** column
3. Save the file
4. Repeat the upload process



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Healthcare Location Manager

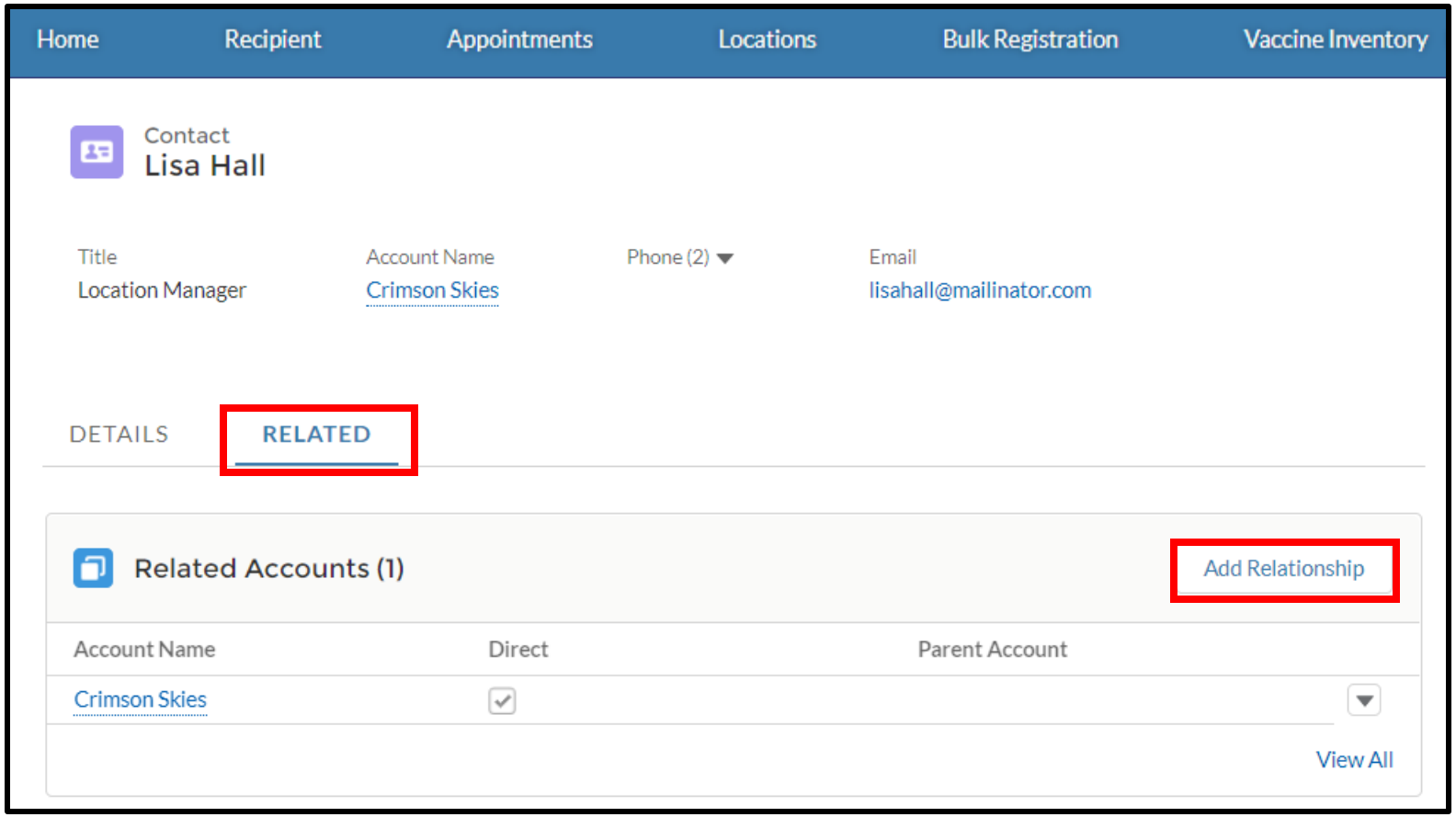
Other Operations Available

Add Multiple Locations to a User

Step 1 of 3: Adding Multiple Locations to an Account

You will be able to provide access to additional locations to CVMS Provider Portal accounts you create.

1. From the HCP Portal Contact record, click **RELATED**
2. Under Related Accounts, click **ADD RELATIONSHIP**



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Healthcare Location Manager

Tips

Remember, you will only be able to add locations you have access to in the CVMS Provider Portal.

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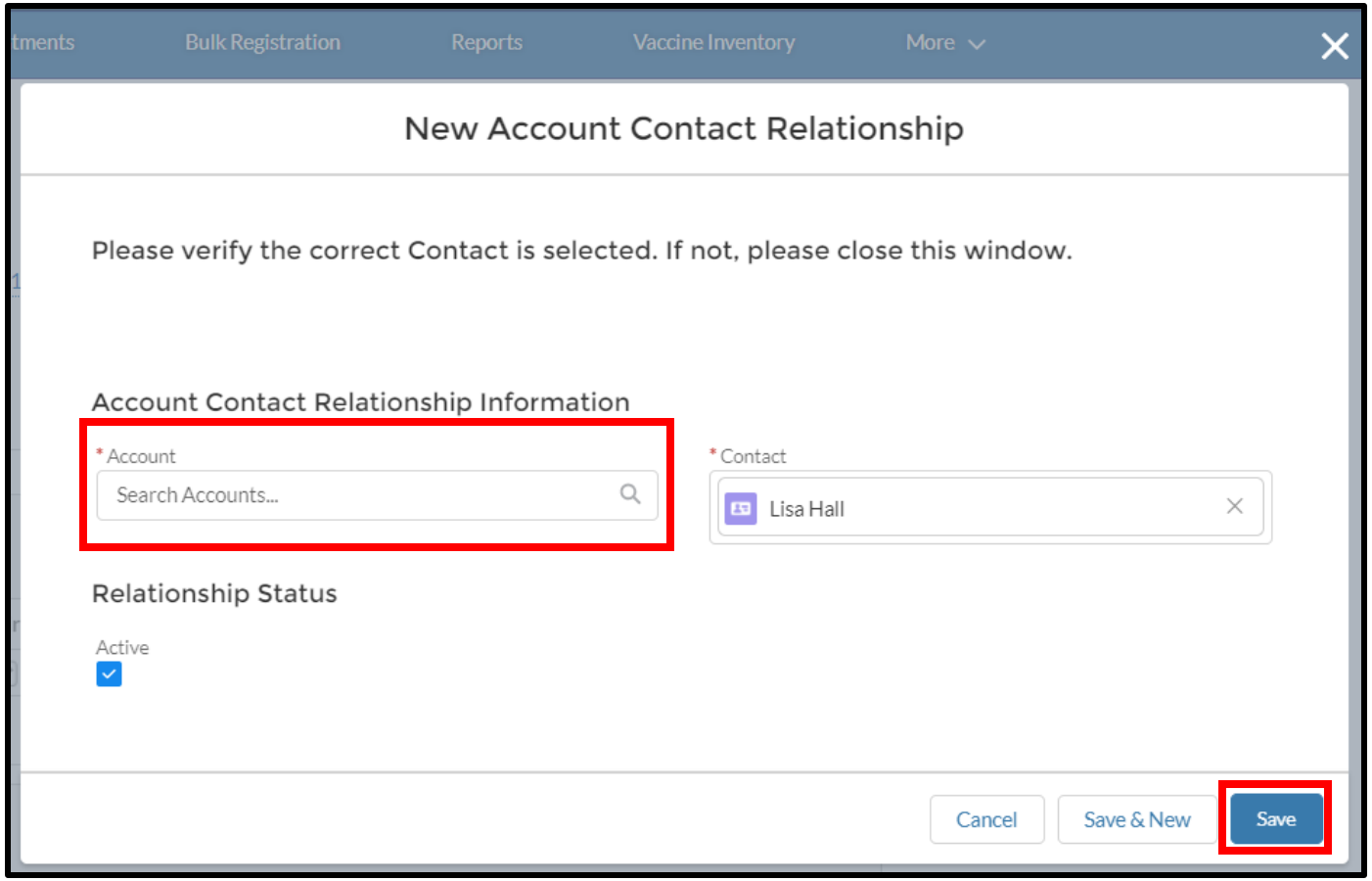
Step 2 of 3: Add Account Relationship

You will see the New Account Contact Relationship page appear.

1. Search for the Account (Location) in the search bar
2. Select the correct **ACCOUNT NAME** from the drop down
3. Click **SAVE**



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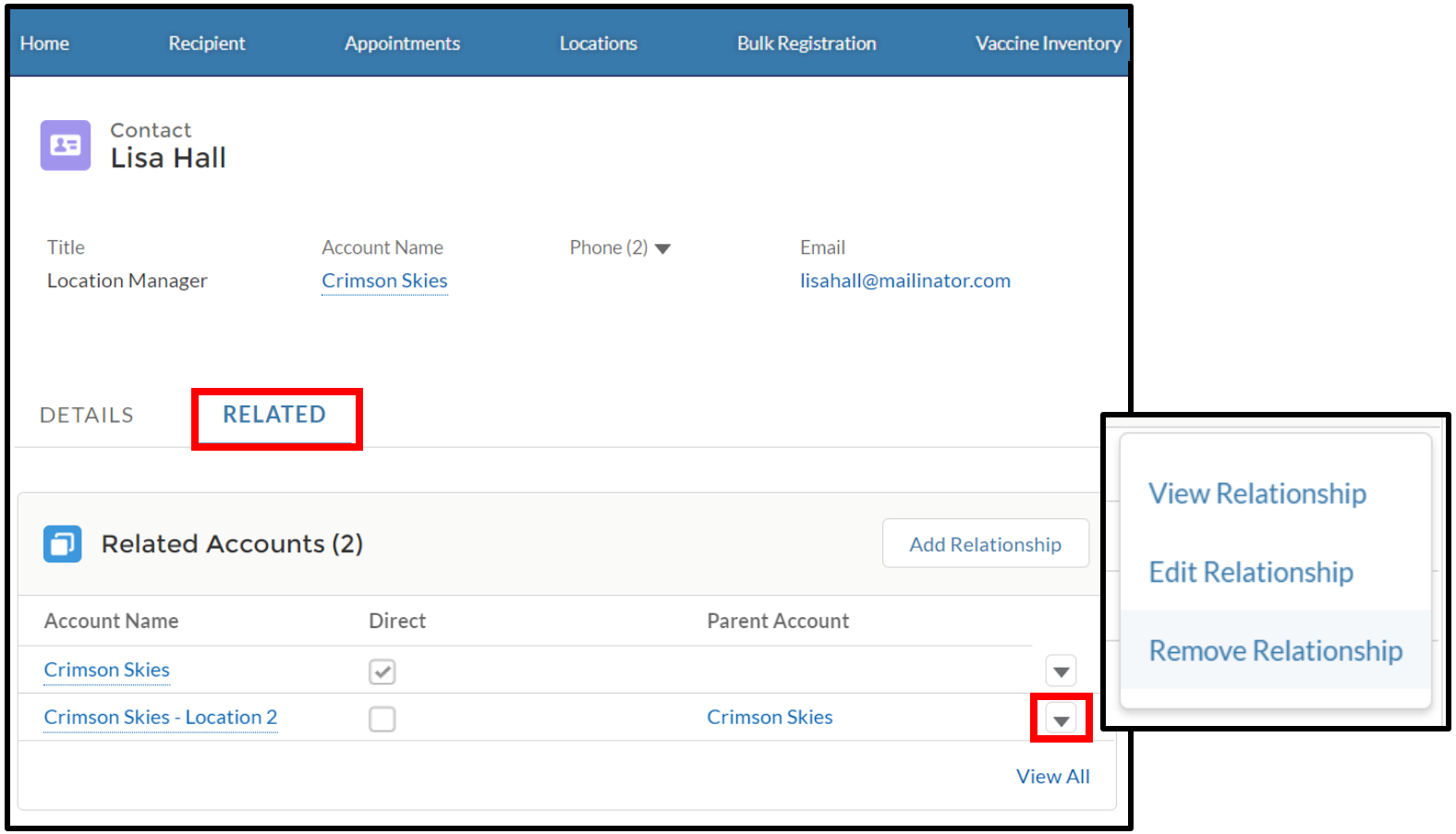
Tips

Enter at least three characters to see your search results.

Step 3 of 3: View and Remove Account Relationships

After clicking Save, the new account relationship will be reflected under the Related Accounts.

You can always remove access to a location by clicking the **DROP-DOWN ARROW** for the account you wish to remove and selecting **REMOVE RELATIONSHIP**.



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Healthcare Location Manager

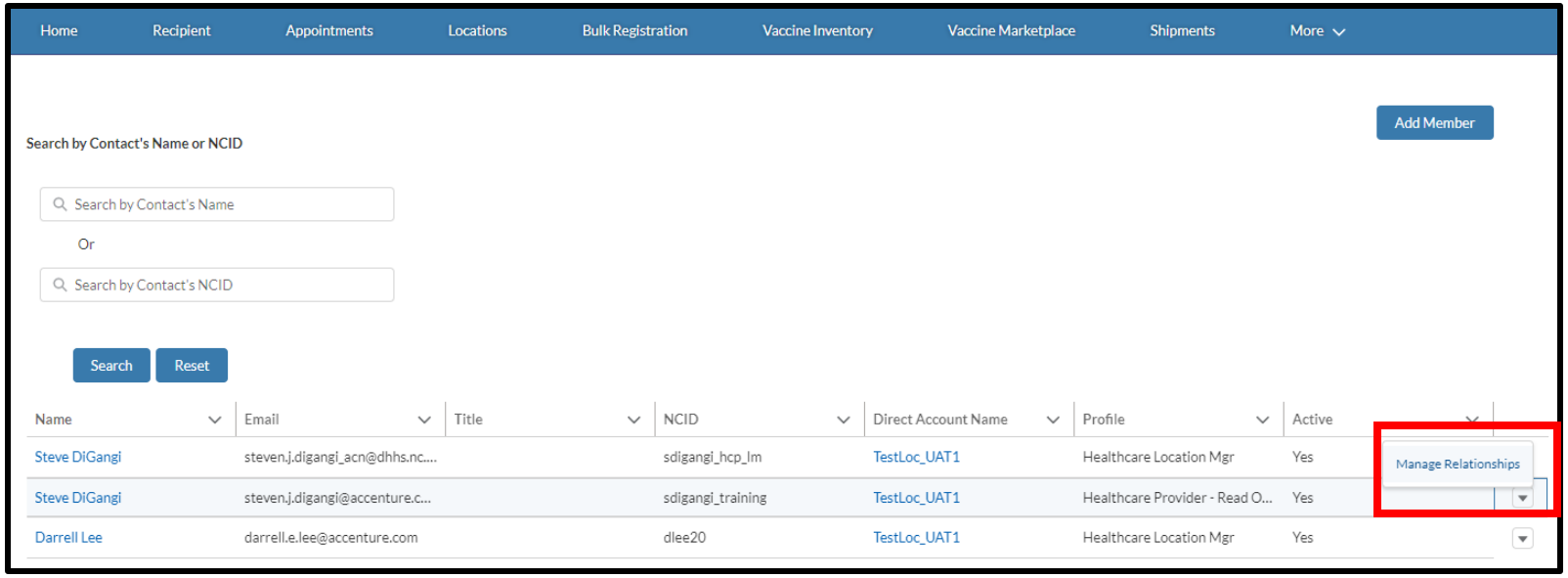
Remove a User's CVMS Provider Portal Access

Step 1 of 2: Manage Relationships to View and Alter Access

This step should be completed if you need to remove an individual's access to the CVMS Provider Portal. CVMS allows you to add and remove access to specific locations as needed. Users will still exist in the system and location access can still be granted as needed in the future.

Note: This function is only available for active user accounts. For assistance removing access for users with inactive accounts, contact the COVID-19 Vaccine Provider Help Desk.

1. From the Account Management tab, search for the account using the **NAME OR NCID**
2. Click the **DROP-DOWN MENU** for the correct row
3. Click **MANAGE RELATIONSHIPS**



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Tips

Before adjusting a CVMS Provider Portal account, use the NCID username as a unique identifier to confirm you found the correct account.

You will only be able to manage CVMS Provider Portal relationships for accounts to which you are assigned.

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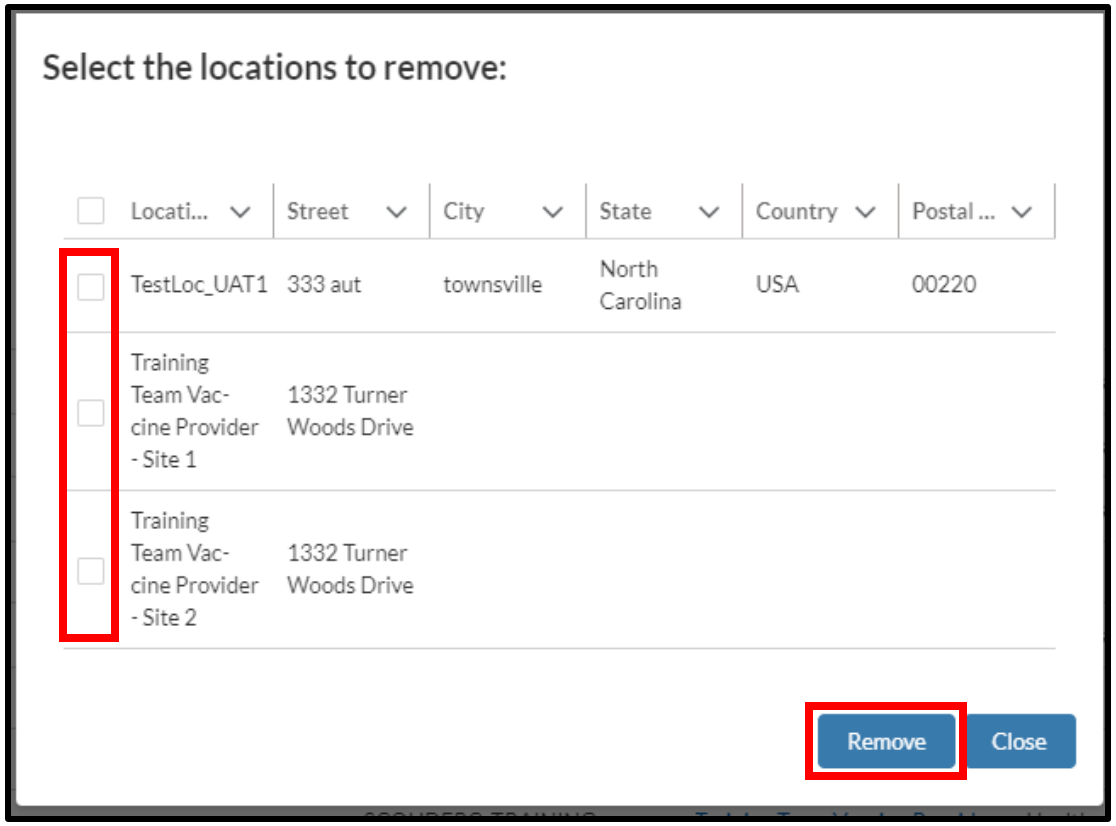
Step 2 of 2: Remove Access as Needed

1. Select the check box next to the appropriate location(s)
2. Click the **REMOVE**



Audience

Healthcare Location Manager

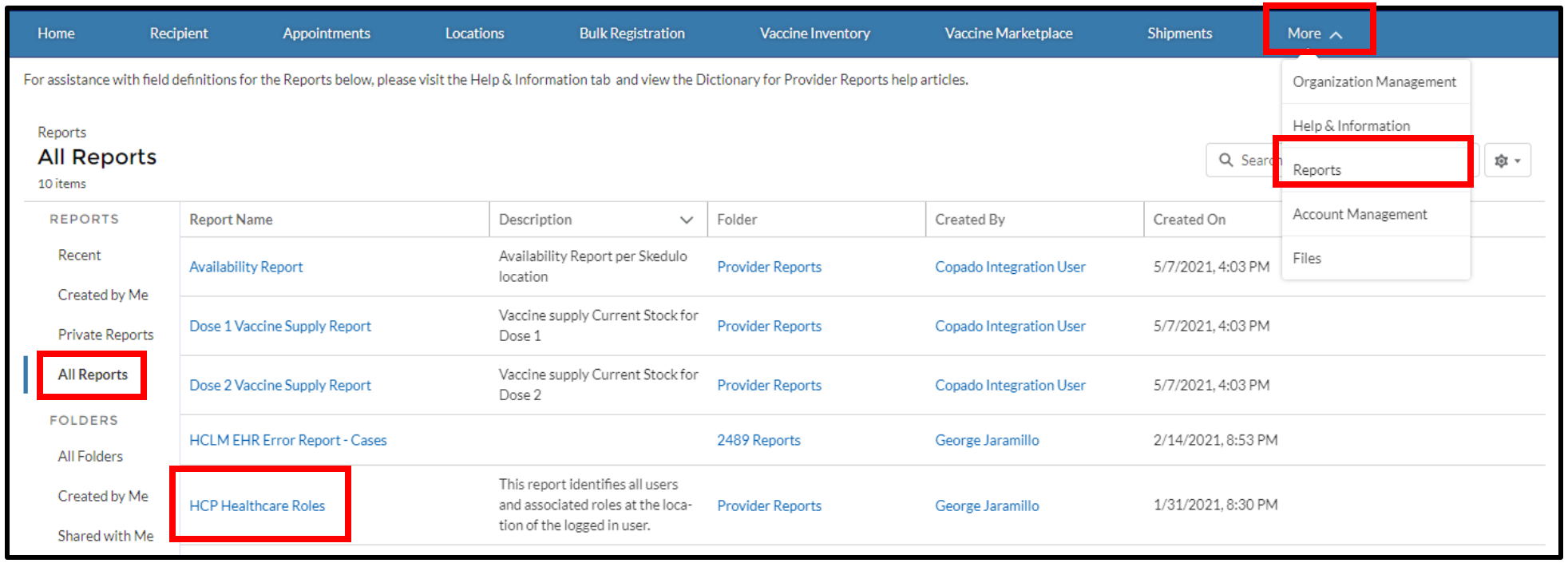
Tips

Please note that if a user was assigned other locations not under your supervision, they will still be able to connect and operate for these other locations after you remove their access to the location you supervise.

Access the HCP Healthcare Roles Report

Accessing the HCP Healthcare Roles Report

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **HCP HEALTHCARE ROLES** 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.

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Accessing the HCP Healthcare Roles Report (Continued)

The HCP Healthcare Roles Report provides the list of every account associated with the account to which you are logged in.

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

Report: Users RT Custom

HCP Healthcare Roles

This report identifies all users and associated roles at the location of the logged in user.

Total Records

6

Account: Account Name	First Name	Last Name	Contact: Title	Contact: NCID	Email	Last Login
TestLoc_UAT1 (6)	Steve	DiGangi	-	sdigangi_hcp_lm	steven.j.digangi_acn@dhhs.nc.gov	7/23/2021, 2:06 PM
	Steve	DiGangi	-	sdigangi_training	steven.j.digangi@accenture.com	7/23/2021, 1:22 PM
	Darrell	Lee	-	dlee20	darrell.e.lee@accenture.com	7/29/2021, 4:52 PM
	Darrell	Lee	-	darrell.e.lee	darrell.lee-acn@dhhs.nc.gov	5/18/2021, 3:37 PM
	Steve	DiGangi	-	sdigangi_statewidelm	steven.j.digangi@accenture.com	7/9/2021, 10:08 AM
	UAT	Tester	-	uat12	avion.bell@ey.com	-
Total (6)						

Audience

Healthcare Location Manager

Tips

To view accounts assigned to other locations, you will need to switch locations from the home screen.

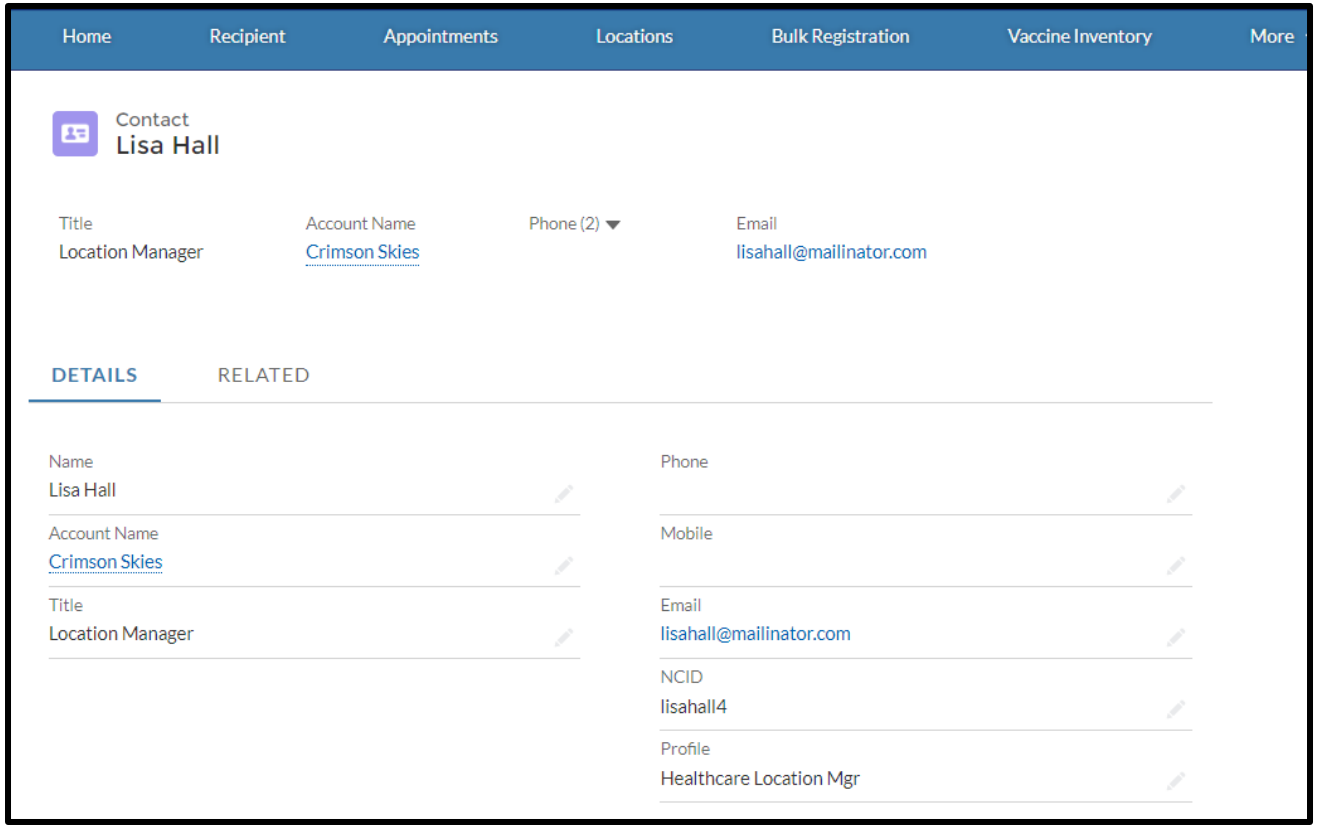
Appendix

How to Edit a User's Email Address on the HCP Portal Contact Record

When a User Contact record is created, an automatic email is sent to the email address provided confirming their new CVMS Provider Portal account. It is very important that you enter the correct email address.

If you need to correct the email address after the record is created, the new email address **WILL NOT** receive an automatic email notification.

You will need to **MANUALLY PROVIDE** the individual with the **CVMS PROVIDER PORTAL LINK** and **LOG IN INSTRUCTIONS** to confirm their new account.



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 of Change	Changes Made	Author
1	2/14/2021	• Initial version	Azalea Troche, Darrell Lee, Kechia Scott
2	2/17/2021	• Renamed User Guide to reflect User Account Management • Removed slides related to Organization Management to a separate user guide	Kechia Scott
3	3/10/2021	• Updated Screenshots	Nicholas M. Rinz
4	3/12/2021	• Update Recipient Check-in • Updated Scheduling tab back to locations tab	Kechia Scott
5	5/5/2021	• Added tip about updated e-mail addressed automatically receiving HCP invitation e-mail	Darrell Lee
6	5/14/2021	• Note added about Profile types	Darrell Lee
7	5/25/2021	• Updated to instruct location managers to only deactivate users that they are sure are no longer active	Darrell Lee
8	6/15/2021	• Remove ability to deactivate a user and replace with Managing Relationships • Added Step 2 of Managing Relationships • Updated screenshots to reflect Vaccine Marketplace	Darrell Lee
9	7/28/2021	• New consolidated version • 3: New table of contents • 7: Added list of features available per profile • 25-27: New reports slides	Vanessa Kemajou Darrell Lee
10	8/5/2021	• 17-28: Added Add Existing User to Your Location and Bulk Upload New User Accounts sections • 11: Added note to skip ahead to new section if a user already exists within CVMS	Darrell Lee
11	8/24/20201	• 10: Added note about creating the initial Healthcare Location Manager as part of the PE process • 14: Updated tip about active vs. inactive accounts • 35: Added note about contacting the help desk for inactive user accounts	Darrell Lee
12	9/15/2021	• Help desk hours updated	Kaitlin Gates