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

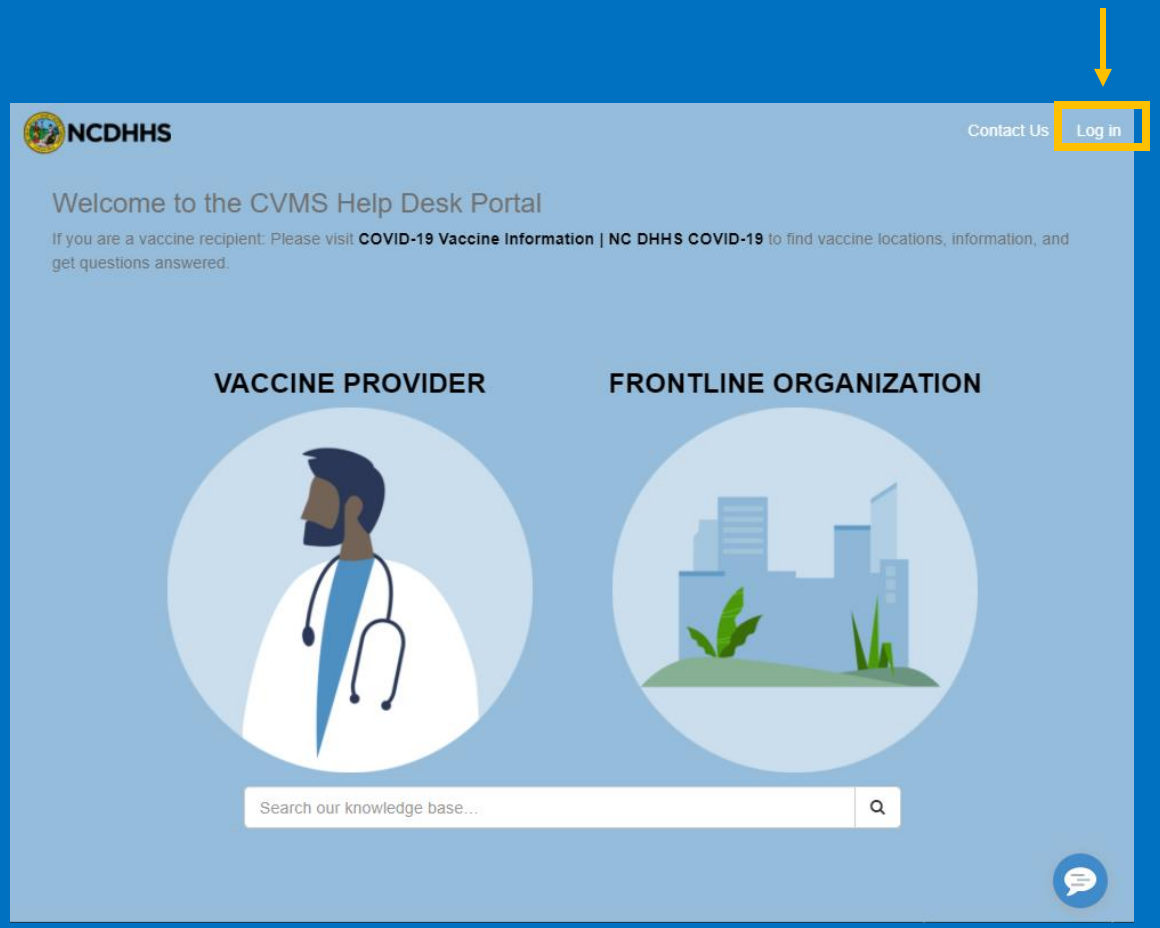
Step 10 - Check-in recipients and document vaccination

User Guide

Version 18

October 20, 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 **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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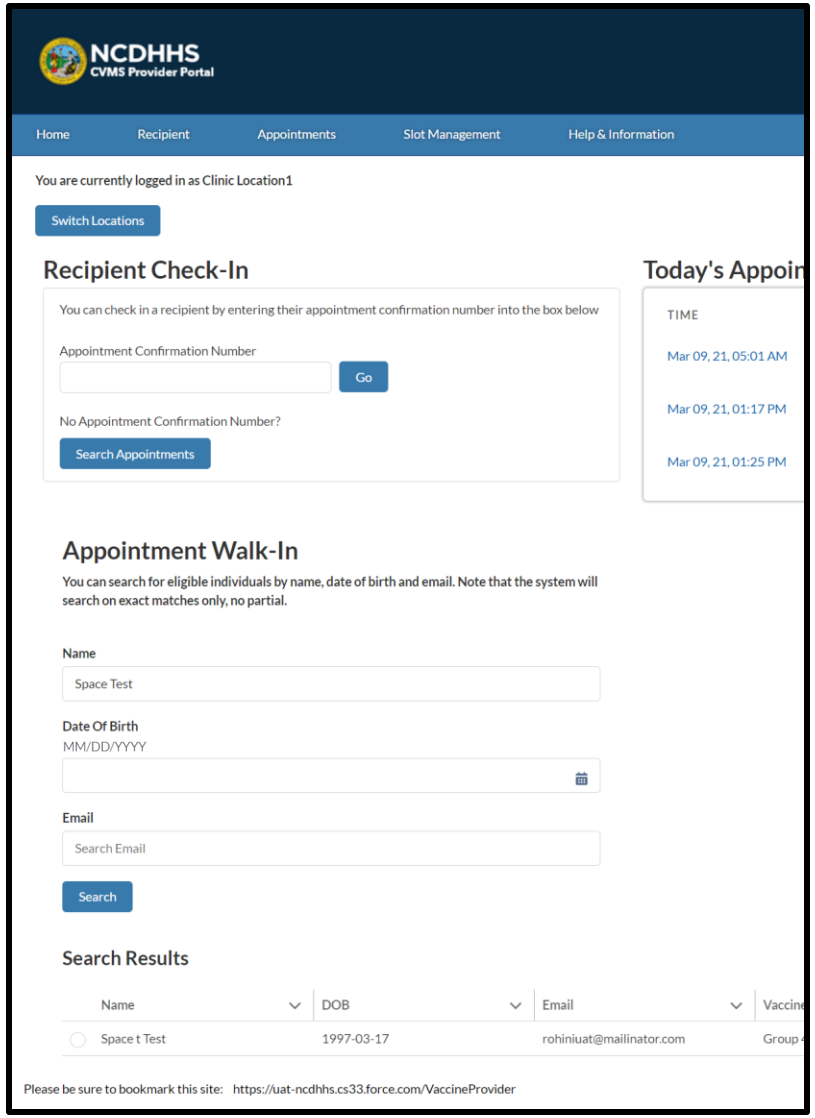
Overview

Overview



In this User Guide, we will discuss how the Healthcare Provider will be able to create recipient records, register recipients, book appointments for recipients, record the details of their vaccine administration, edit the recipient's information or vaccine administration details, and view the recipient's vaccine information.

It is important to note that to document a recipient Vaccine Administration in CVMS, the recipient **MUST BE** registered in CVMS. Registered in CVMS means the Recipient Record is found in CVMS, and the **COVID-19 Vaccine Registration** form is complete.

This set of activities can be performed by a user with a **HEALTHCARE PROVIDER, HEALTHCARE LOCATION MANAGER, or Statewide Location Manager.**

If your location enabled the scheduling feature in CVMS, please also check the <u>Scheduling Feature at Point of Care and Vaccine Administration</u> section of this guide.

You will also need to:

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

Now, let's get started!

Checking-in a Recipient at the Front-desk of the Point of Care

Appointment Walk-In Booking Process

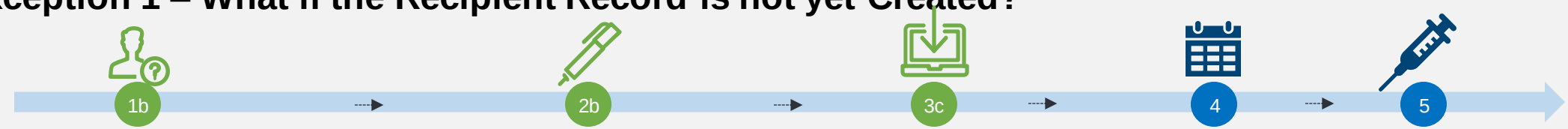
Standard Appointment Walk-in Booking – Recipient Already Registered on COVID-19 Vaccine Portal

Recipient shows up to receive their Vaccine. The HCP finds the recipient in the Appointment Walk-In Tool or their Appointment Confirmation Number.

Provider creates an Appointment Booking for the recipient.

Provider opens Appointment Booking and begins Vaccine Administration Process.

Exception 1 – What if the Recipient Record is not yet Created?

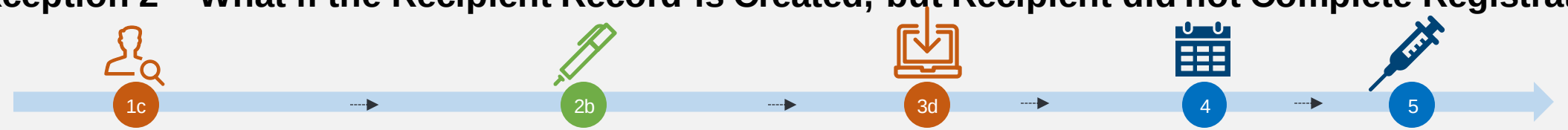


Provider does not find the Recipient in the Appointment Walk-In Tool, or in the Recipient tab.

Provider instructs recipient to fill out a Paper Copy of the COVID-19 Vaccine Registration Form.

Provider creates the Recipient Record and completes registration.

Exception 2 – What if the Recipient Record is Created, but Recipient did not Complete Registration?



The recipient isn't found in in the Appointment Walk-In Tool, BUT is found in the Recipient tab.

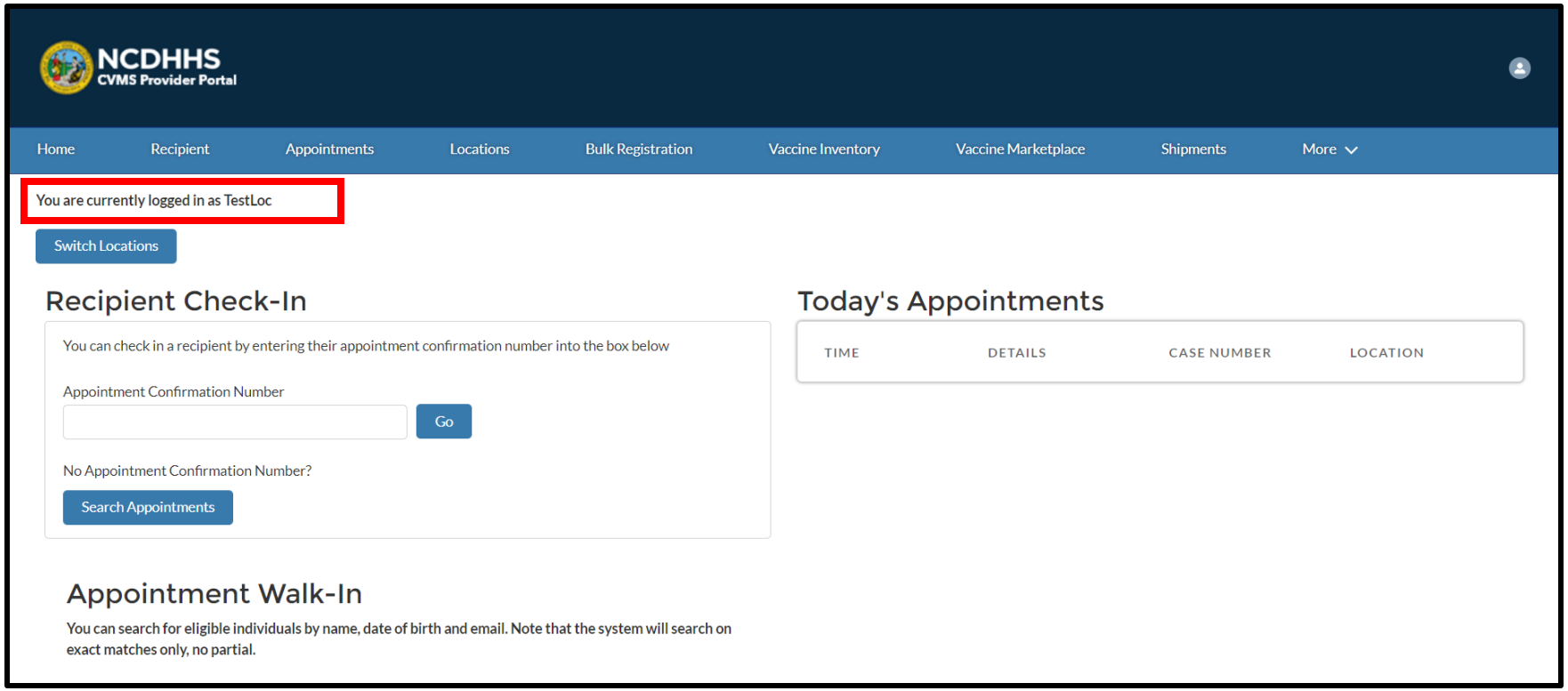
Provider completes registration.

Confirm Location of Operations
(only for users associated to multiple locations)

Step 1 of 4: Verify Location for Operations

Before you begin logging checking in recipients for **VACCINE ADMINISTRATION**, you will need to verify which location you are operating from.

The current location you are operating from is displayed at the top left of the screen. If the location is correct, no further action is required.



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

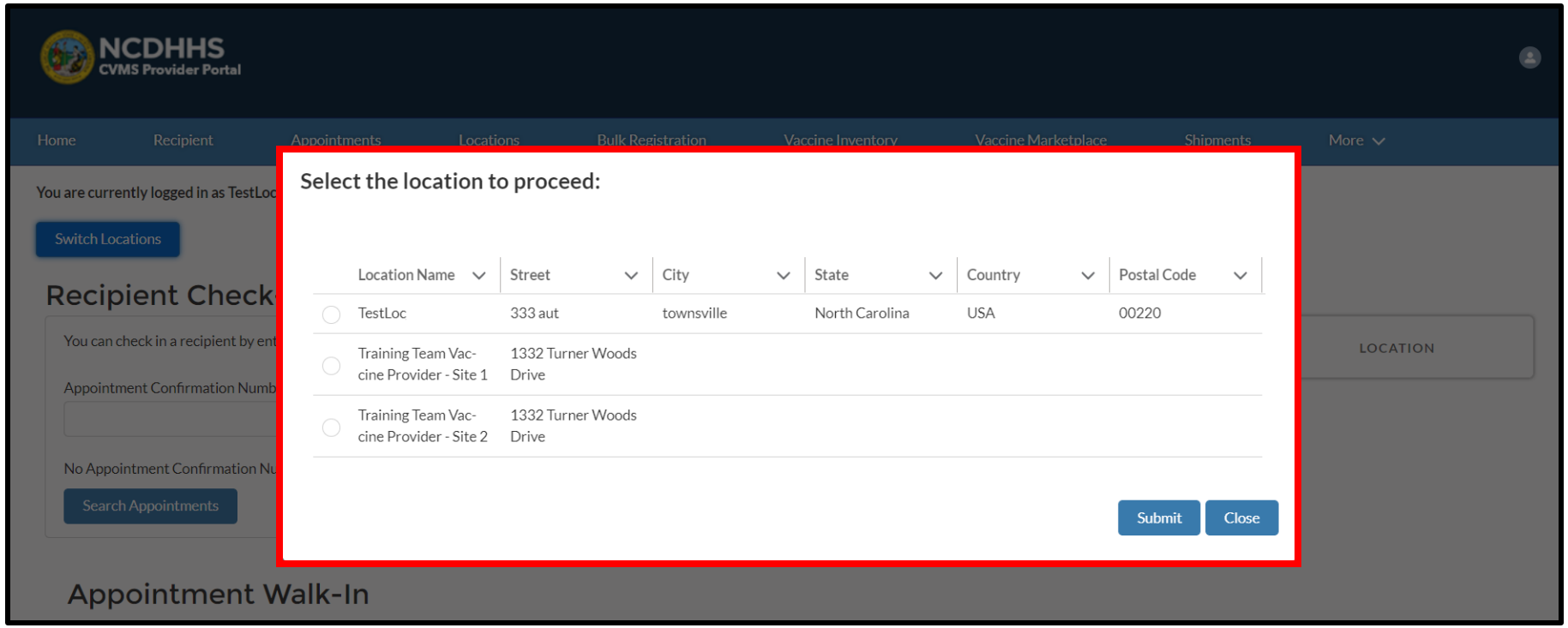
Tips

To learn more about getting access to other locations, speak to your location's **HEALTHCARE LOCATION MANAGER** in charge of setting up user accounts.

Step 2 of 4: Begin Switching Locations

If the location needs to be changed (e.g., you are operating in a different clinic location than the one currently displayed), continue following the instructions in this section.

1. Select the **SWITCH LOCATIONS** button
2. A pop-up window will appear asking you to select the location you would like to be operating in



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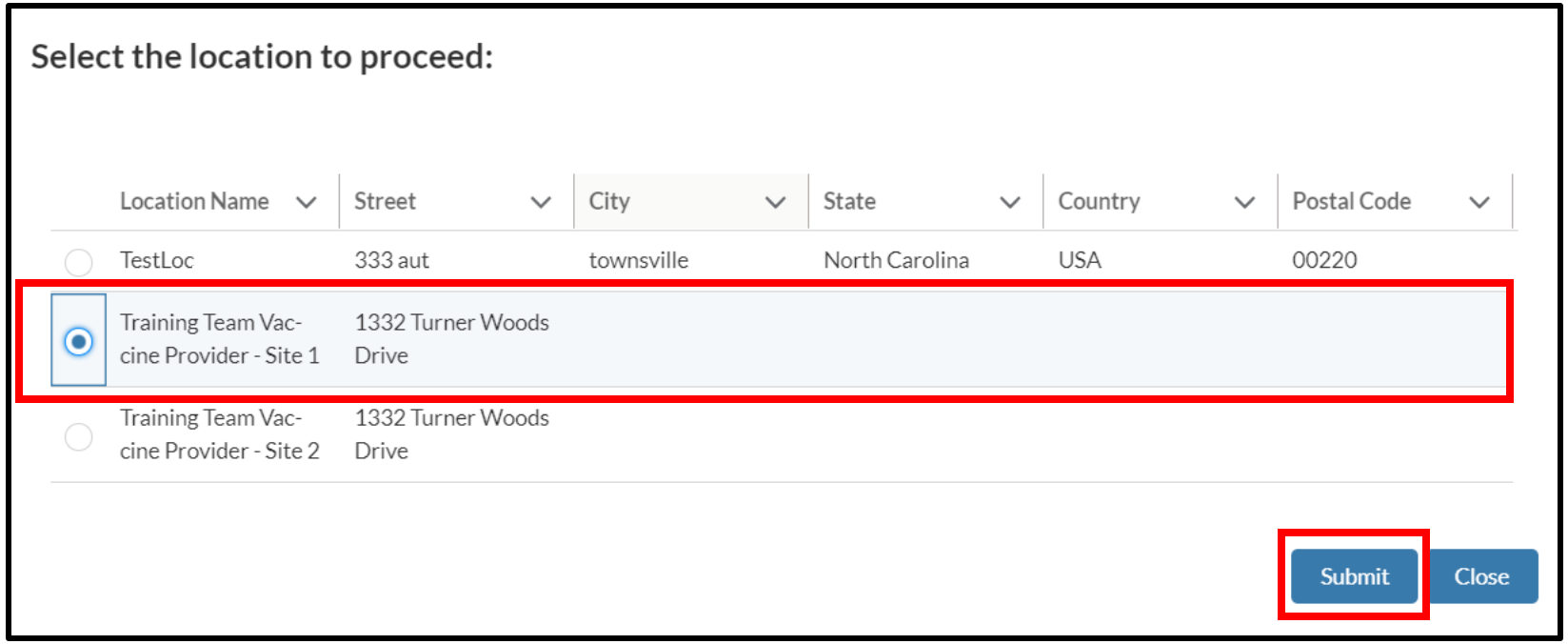
Step 3 of 4: Submit New Location To Operate In

1. Select the location that you would like to operate in
2. Verify that the address matches the desired location
3. Click **SUBMIT**



Audience

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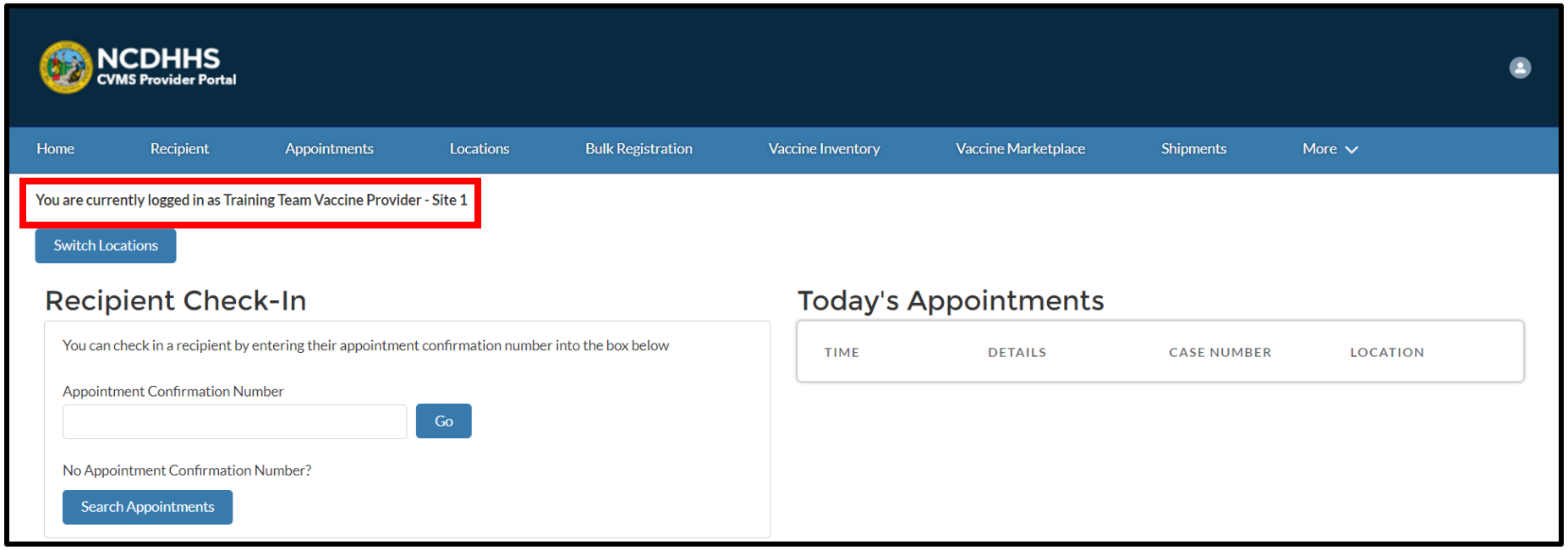
Statewide Location Manager

Tips

To see a list of locations you have access to operate in / can search for, speak to your location's **HEALTHCARE LOCATION MANAGER** or your location's **VACCINE COORDINATOR.**

Step 4 of 4: Confirm Successful Location Switch

Verify that the location successfully switched by checking the display at the top left of the Home Tab.



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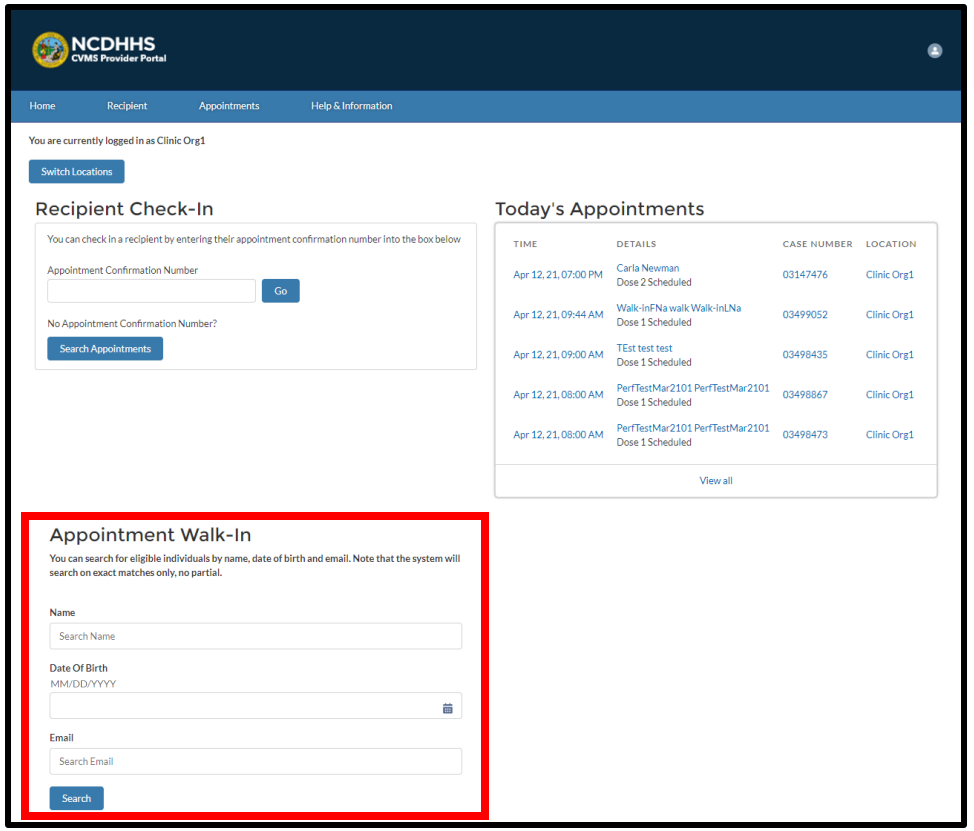
Standard Point of Care Walk-in Appointment: Recipient is Registered in COVID-19 Vaccine Portal

Step 1 of 5: Navigate to the CVMS Provider Portal Home Page

From the **HOME PAGE**, you will complete a simple **SEARCH** using the **APPOINTMENT WALK-IN TOOL** on your home page before the recipient receives the COVID-19 vaccine.

Note: *If you do not have the scheduling feature in CVMS enabled, you will not see the* ***RECIPIENT CHECK-IN*** *tool on the Home Tab. For more information, refer to the* ***Scheduling Feature at Point of Care and Vaccine Administration*** *section of this guide.*



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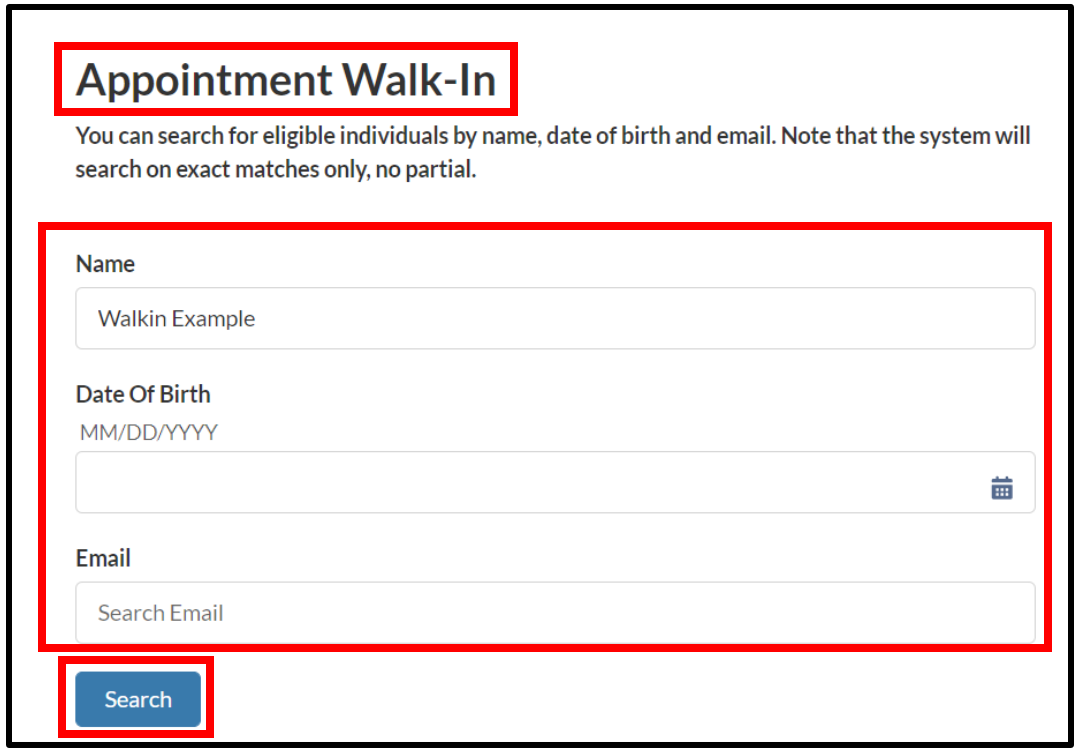
- **Healthcare Location Manager**
- **Statewide Location Manager**

Tips

If you have access to **multiple locations in CVMS,** be sure to look at the location you are operating in by looking at the **top left of the screen under the Tabs bar**.

If you need to change the location to match where you are operating for the day, select the **SWITCH LOCATIONS** button and choose the applicable location.

Step 2 of 5: Search for the Recipient



To get started, you will search for the **RECIPIENT** to help you **VERIFY IDENTITY** before creating their appointment.

1. Enter the recipient's **NAME**, **DATE OF BIRTH** and / or **EMAIL ADDRESS** in the Appointment Walk-in Tool located on the Home Page
2. Only one field is required to search
3. Click **SEARCH**

***Note**: To document a recipient Vaccine Administration in the CVMS Provider Portal, the recipient MUST BE registered in CVMS. Registered in CVMS means the Recipient Record is created, and the COVID-19 Registration Form is complete.*

Audience

Healthcare Provider

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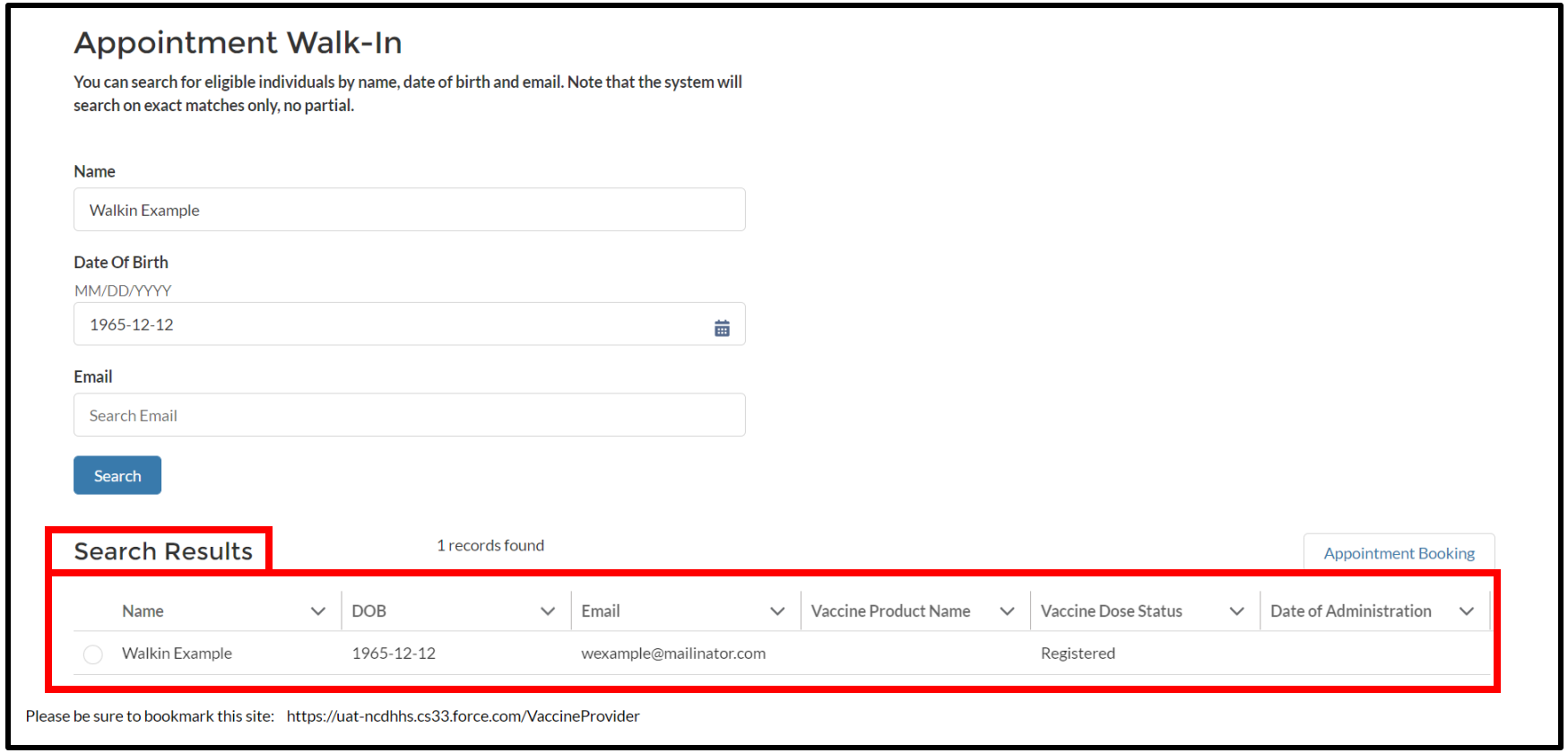
Statewide Location Manager

Tips

To narrow your recipient search results, you can enter all search fields to help you find the recipient faster.

Step 3 of 5: Review Recipient's Information

After clicking search, you will see your **RECIPIENT SEARCH RESULTS** populate underneath the Appointment Walk-In Tool. You will be able to view the Recipient's **NAME, DATE OF BIRTH (DOB), EMAIL, VACCINE PRODUCT NAME** (if they have already received a dose), **VACCINE DOSE STATUS,** and **DATE OF ADMINISTRATION** (if they have already received a dose)**.**



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Statewide Location Manager

Tips

VACCINE DOSE STATUS indicates where a recipient is in their progress toward being vaccinated. Possible statuses include:

REGISTERED
DOSE 1 SCHEDULED
DOSE 1 ADMINISTERED
DOSE 1 CANCELLED
DOSE 2 SCHEDULED
DOSE 2 ADMINISTERED
DOSE 2 CANCELLED
ADDITIONAL DOSE/BOOSTER SCHEDULED
ADDL DOSE/BOOSTER ADMINISTERED
ADDL DOSE/ BOOSTER CANCELLED

Step 4 of 5: Create the Appointment Booking

Once you verified the recipient's identity, you can officially **CREATE THEIR APPOINTMENT BOOKING**. This can occur for a recipient's first dose, second dose, or an **ADDITIONAL DOSE / BOOSTER** if one is required.

1. In your **SEARCH RESULTS,** select the **CORRECT RECIPIENT RECORD**
2. Click **APPOINTMENT BOOKING** (you may also click the arrow to the right to select which specific appointment this is for – selecting a specific dose appointment will not affect which vaccine dose you may select during vaccine administration)
3. A message confirming the appointment booking was created will appear
4. Click **OK**

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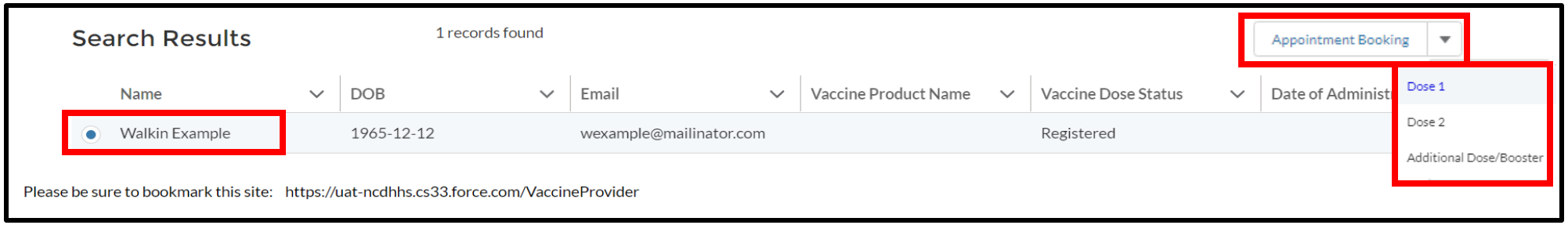

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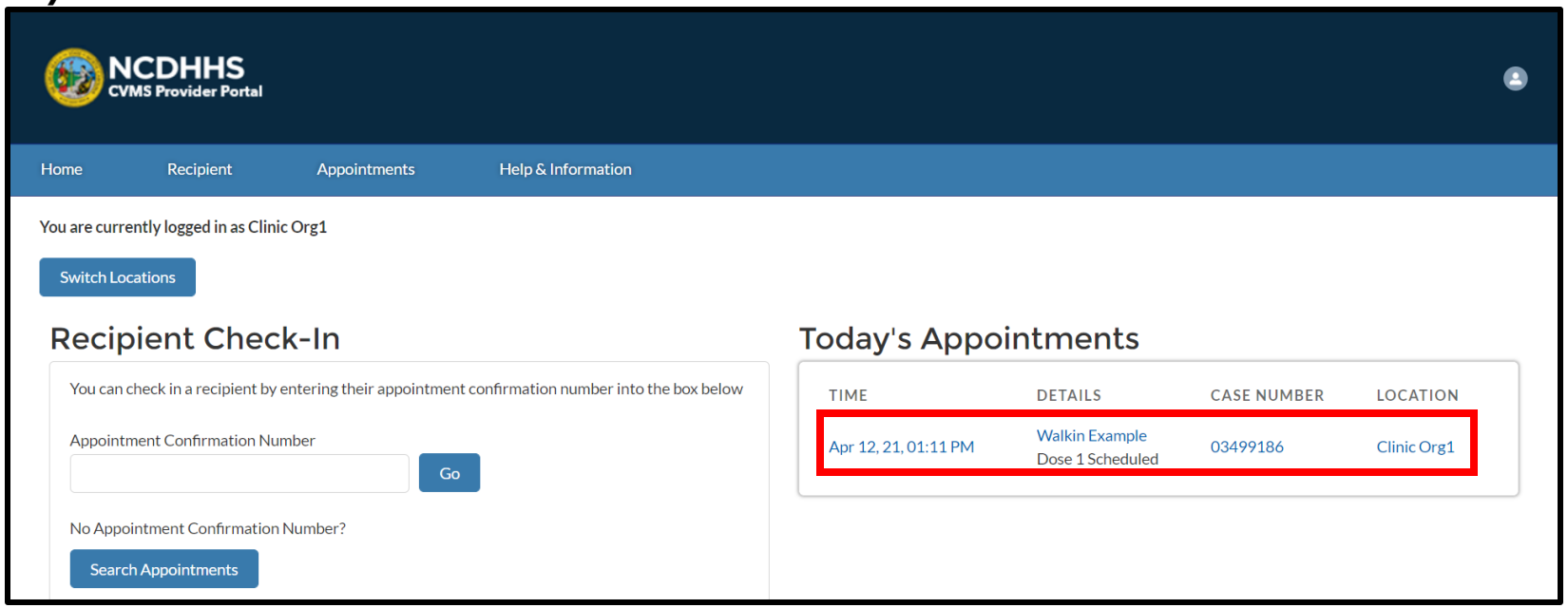
Step 5 of 5: Review the Appointment Booking

The appointment that is created will be available to you under **TODAY'S APPOINTMENTS**.

To begin the **VACCINE ADMINISTRATION** process, the recipient will require an **APPOINTMENT BOOKING** or **APPOINTMENT CONFIRMATION NUMBER (if scheduling feature in CVMS is enabled).**



***Note**: To know more about the **VACCINE ADMINISTRATION** process, please refer to the **Enter a Vaccine Administration Record** section of this user guide.*

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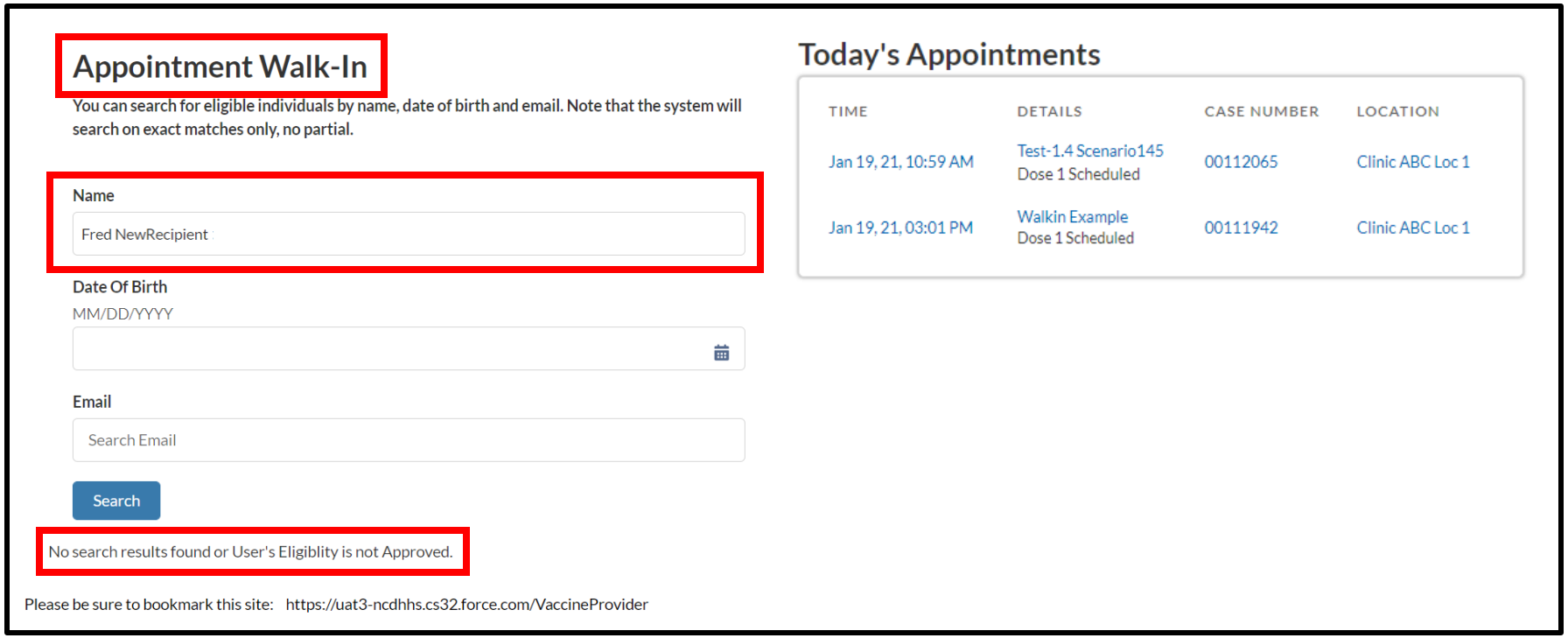
- **Statewide Location Manager**

Exception 1: Recipient Record is not yet Created in CVMS

Step 1 of 9: Navigate to the CVMS Provider Portal Home Page

1. From the **HOME PAGE**, enter the recipient's name in the **APPOINTMENT WALK-IN TOOL**
2. If the recipient's record does not appear, this means that the recipient is either not registered or does not have a record



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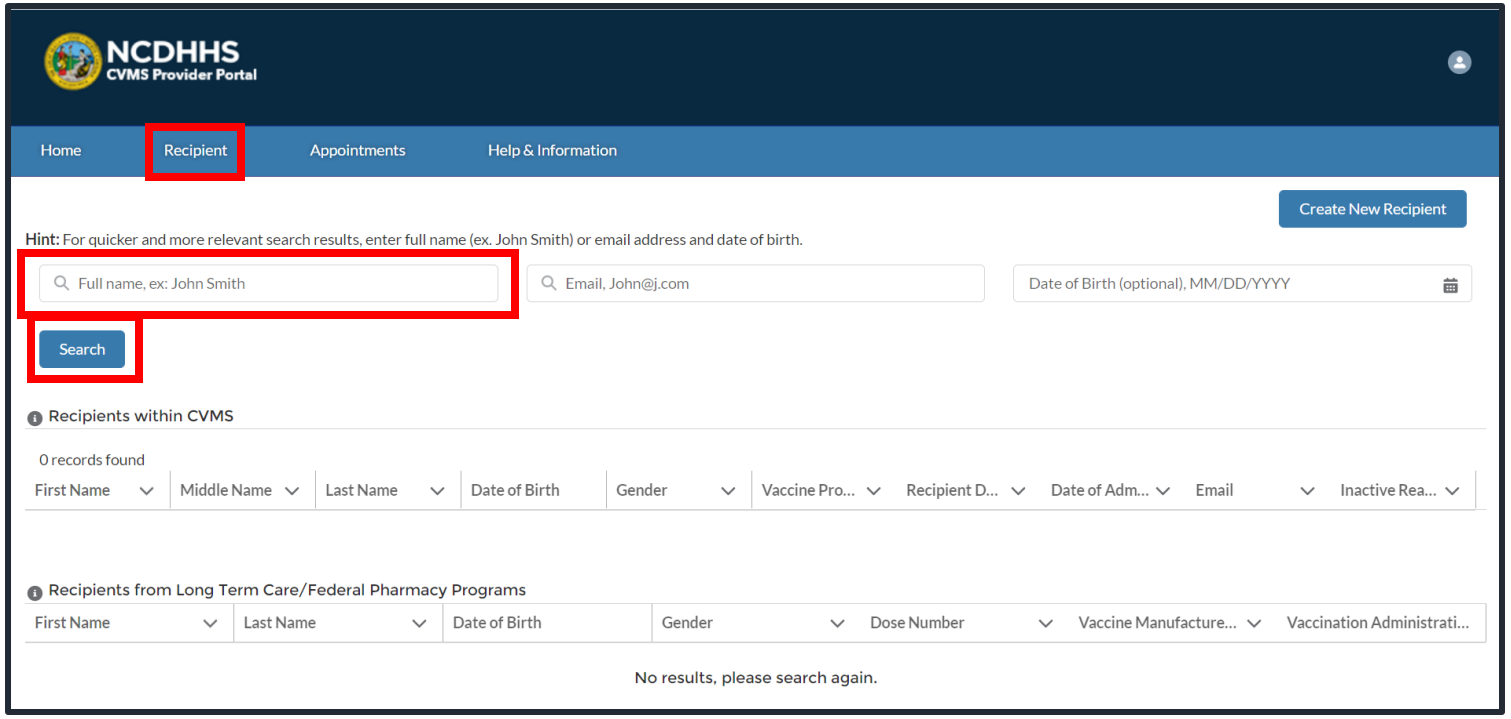
Step 2 of 9: Search for the Recipient Record

To see if the recipient has a record, but is not yet registered, search for them in the **RECIPIENT** tab.

1. Navigate to the **RECIPIENT** tab
2. Enter the recipient's **NAME** (first name and last name) in the search bar, being sure to enter at least three characters to receive any results
3. To help narrow results, enter the recipient's **DATE OF BIRTH or EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bars, and cannot be used by itself

4. Click **SEARCH**



Audience

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Statewide Location Manager

Tips

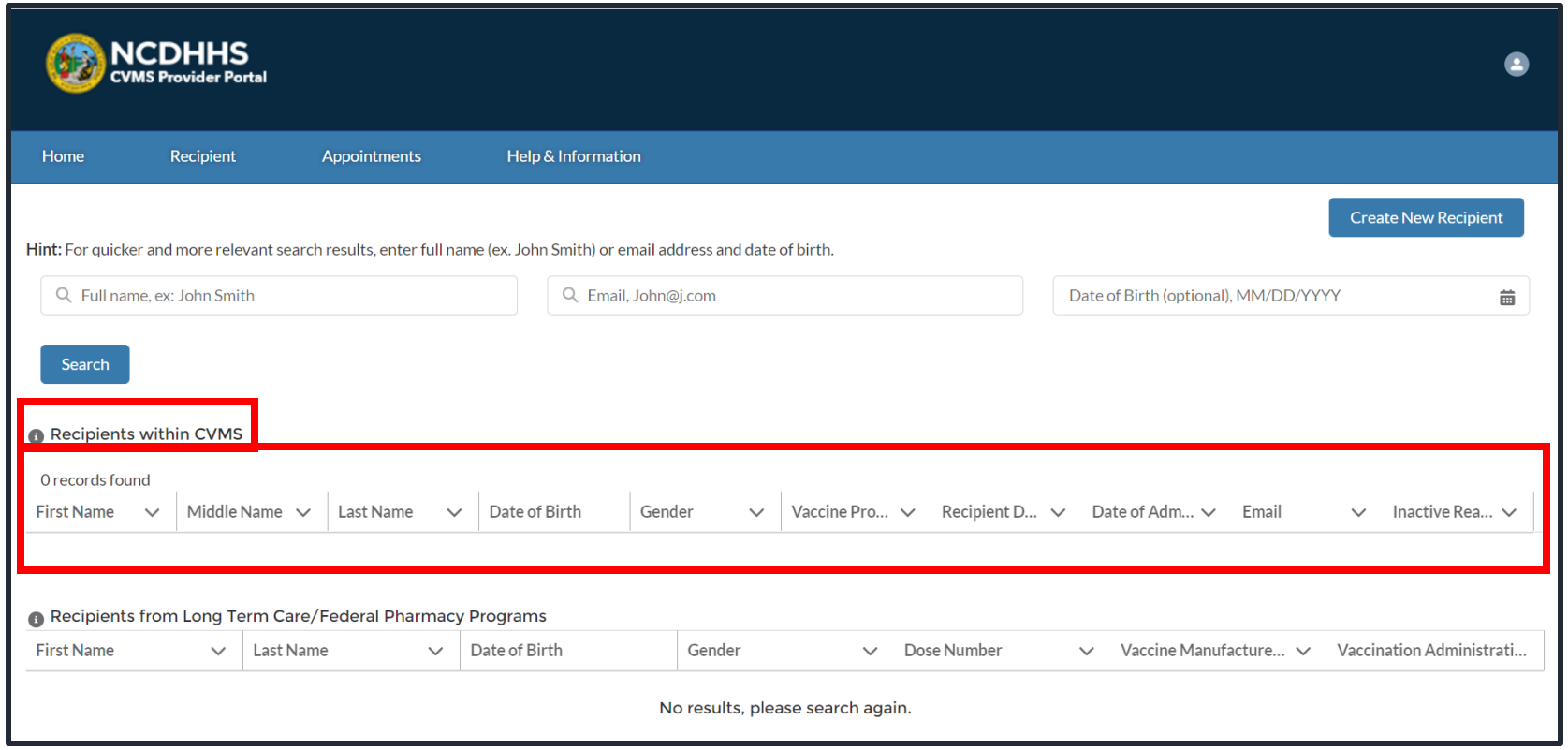
A Vaccine Administration cannot be documented in CVMS if the recipient is not registered in CVMS.

Registration is complete when the **COVID-19 Vaccine Registration** form is entered into CVMS. This can occur in the **COVID-19 VACCINE PORTAL** or the **CVMS PROVIDER PORTAL.**

Step 3 of 9: Search for the Recipient Record

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in either the **RECIPIENTS WITHIN CVMS** section, or the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section

If there are **NO** results in the **RECIPIENTS WITHIN CVMS** section, or the **CORRECT** recipient cannot be found, this indicates that the recipient does not have a record in CVMS, and must be created on-site



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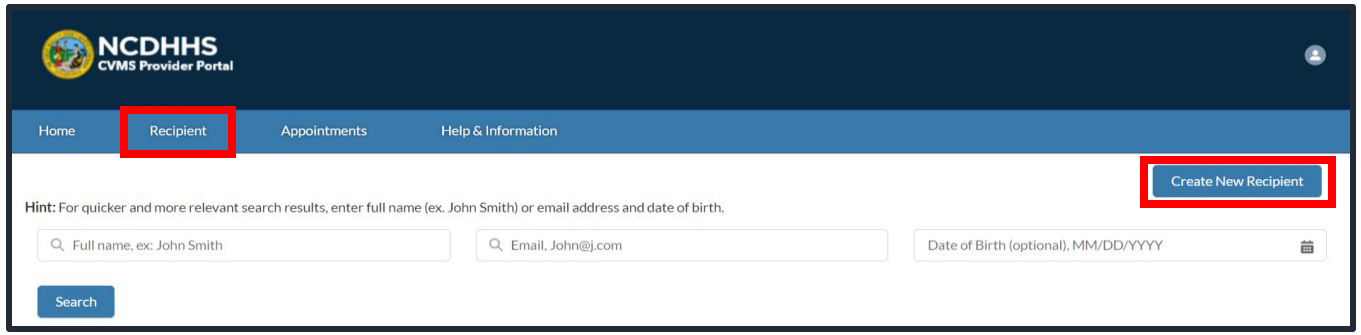
Tips

For more information on how to handle recipient search results that appear in the **RECIPIENTS FROM LONG TERM CARE/ FEDERAL PHARMACY PROGRAMS** section, please see the **Other Operations in Recipient Point of Care** portion of this User Guide.

Step 4 of 9: Ask the recipient to answer the COVID-19 Vaccine Registration Form

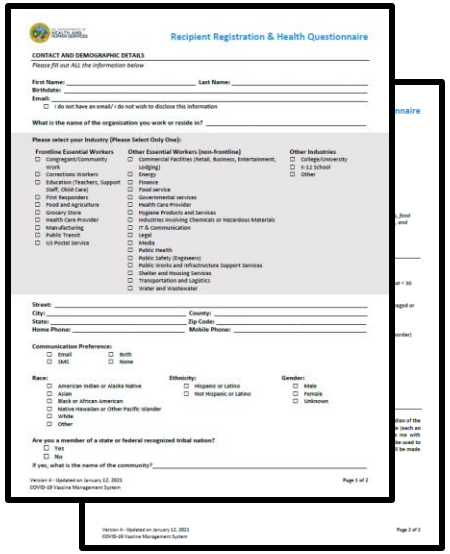
OPTION 1 – Register the recipient by filling out the COVID-19 Vaccine Registration form with the recipient

1. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form, read the questions and type the recipient's answers



OPTION 2 – Ask the recipient to answer the questions on a Paper Copy

1. Instruct the recipient to fill out a paper copy of the COVID-19 Vaccine Registration form (the PDF file is available under the **HELP & INFORMATION TAB** or on the NC Immunization Branch website at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19]() labeled as **RECIPIENT REGISTRATION AND COVID-19 VACCINE ADMINISTRATION FORM** (in English and Spanish)
2. Give the recipient a few minutes to fill the form
3. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form



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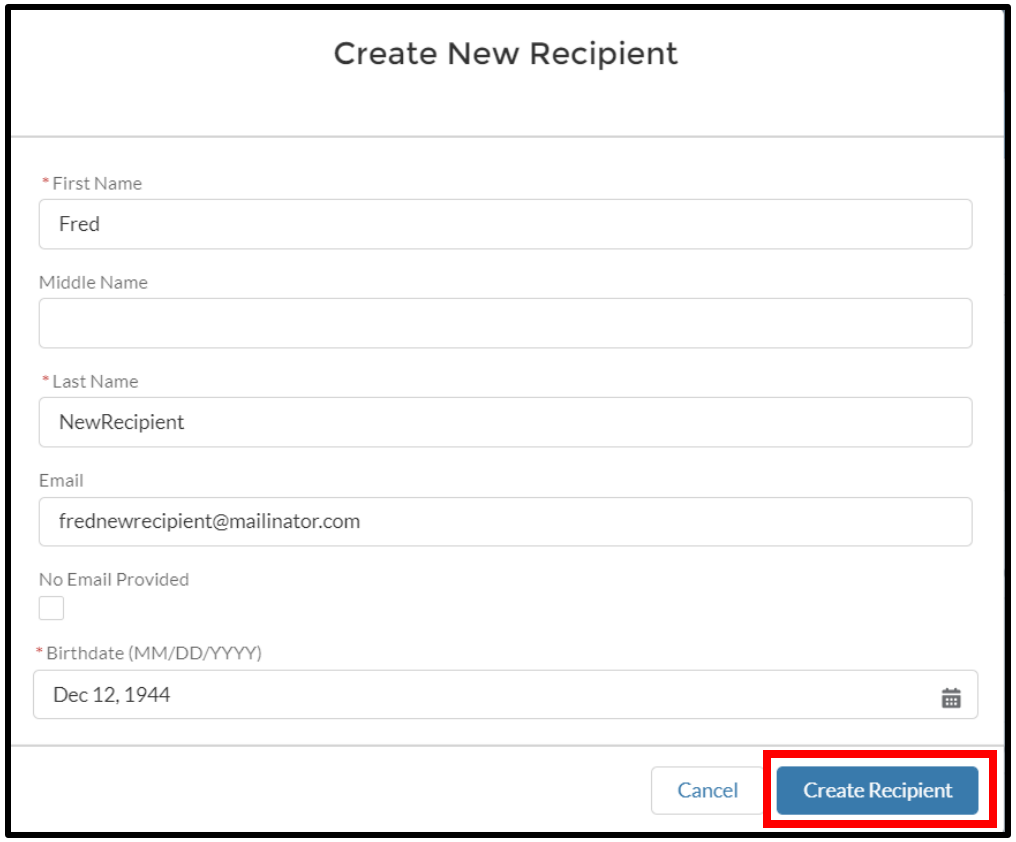
Tips

Print several copies of the **COVID-19 Vaccine Registration form** to keep on hand to provide recipients.

Step 5 of 9: Create the Recipient Record



Fill in the required fields.

1. If the recipient cannot provide an email address, select the **NO EMAIL PROVIDED** checkbox. Please inform the recipient that in the absence of an email address, it will not be possible for them to connect to the COVID-19 Vaccine Portal and view their Vaccine Information PDF. You can however access the Vaccine Information PDF from the CVMS Provider Portal and print it for them if needed
2. Enter **BIRTHDATE**
3. Select **CREATE RECIPIENT**

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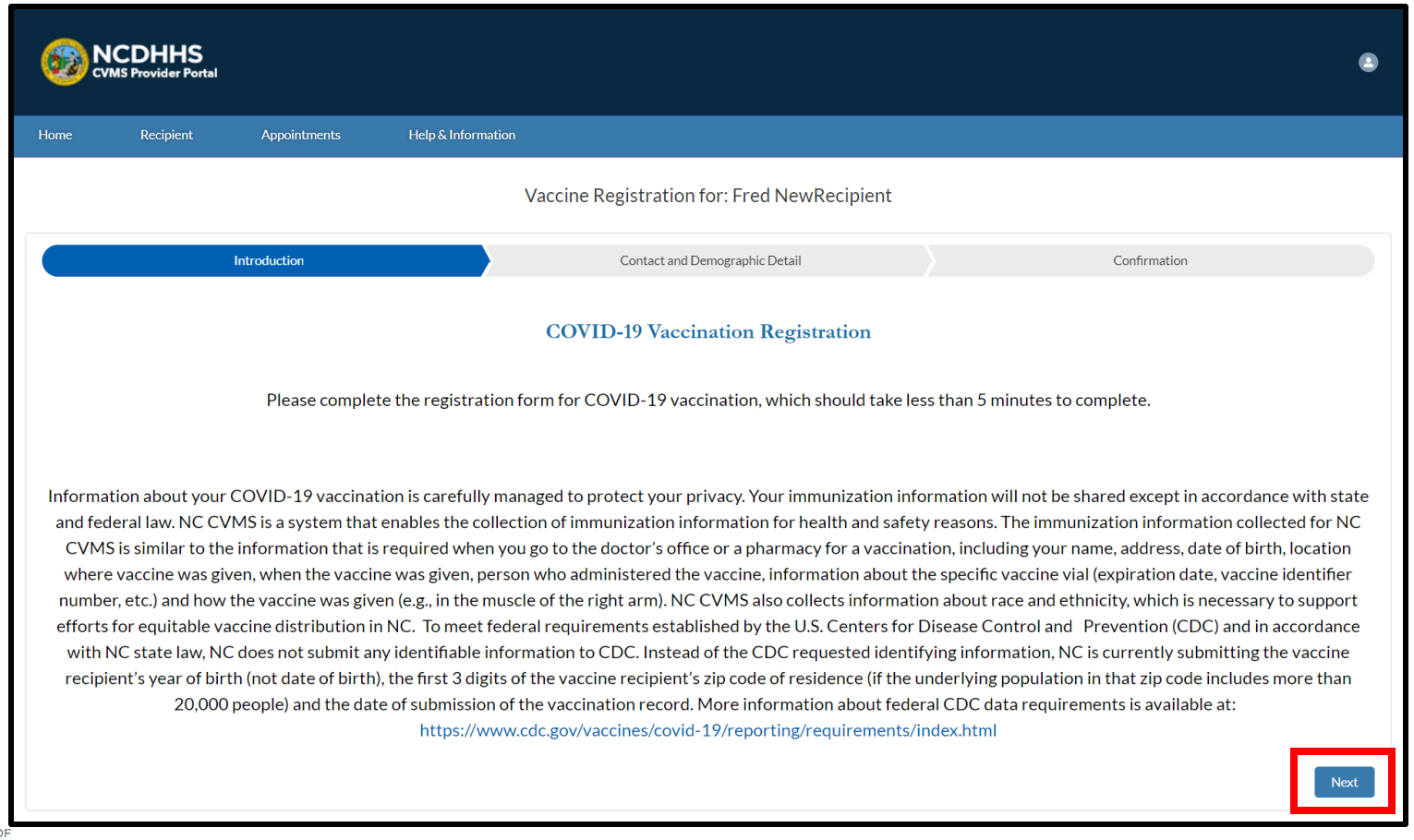
Step 6 of 9: Begin the recipient's COVID-19 Vaccine Registration

Once the recipient is created, a new browser tab will open for you to fill out the recipient's **COVID-19 Vaccine Registration** form using the paper copy the recipient filled out.

1. Review the information statement
2. Click **NEXT**



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Step 7 of 9: Enter the Recipient's Demographic Information and Vaccine Group

1. Enter the recipient's demographic information, contact information, language, and disability as entered by the recipient on **COVID-19 Vaccine Registration form**
2. Click **NEXT**

Vaccine Registration for: Fred NewRecipient

Introduction | Contact and Demographic Detail | Confirmation

Please provide the information below. Items with a * are required.

*First Name: Fred
Middle Name:
*Last Name: NewRecipient
*Address Line 1:
Address Line 2:
*City:
*County: --None--
*State: --None--
*Zip Code:
Email (Will allow you to access your vaccine information in the COVID-19 Vaccine Portal.): frednewrecipient@mailinator.com
Home Phone:
Mobile Phone:
*The best way to contact you: --None--
*Date of Birth (MM/DD/YYYY): Dec 12, 1944
*Race: --None--
*Ethnicity: --None--
*Gender: --None--
Preferred Language: --None--
*Providing a Language preference will not provide translated text/communication, except Spanish.

Please check all disabilities that apply to you:

- [x] Not Disabled
- [ ] Cancer
- [ ] Cognitive (Psychological or Psychiatric)
- [ ] Neurological
- [ ] Physical (Mobility)
- [ ] Respiratory
- [ ] Sensory (Vision or Hearing)
- [ ] Other (Please Specify)

Next

Audience

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Tips

We strongly encourage recipients to provide a valid email address as it will give them access to the COVID-19 Vaccine Portal, from where they can download their Vaccine Information PDF.

If a recipient lives in an apartment or suite, use the optional **ADDRESS LINE 2** field.

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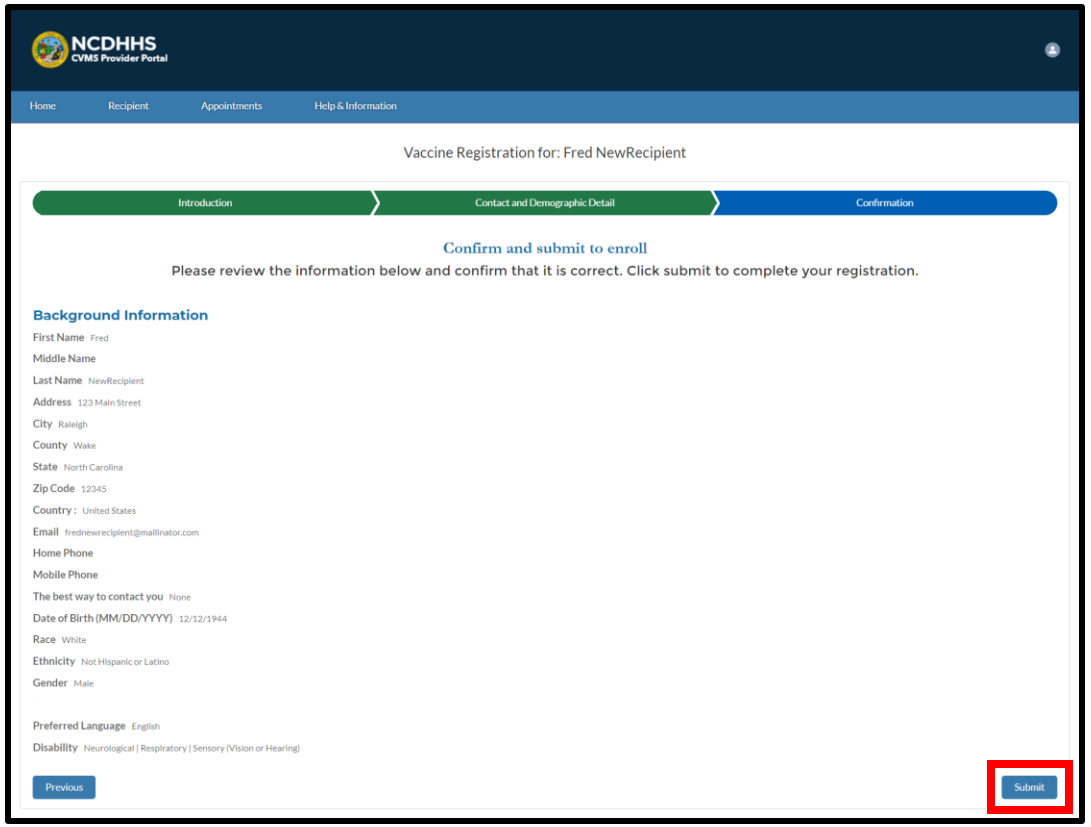
Step 8 of 9: Submit the Recipient's Information

Review the information you entered from the paper copy of the **COVID-19 Vaccine Registration form**.

1. Validate that the information entered matches the information given by the recipient
2. To make changes, select **PREVIOUS**
3. If the information is correct, select **SUBMIT**



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Tips

If you have any questions about what a recipient wrote on a paper registration form, ask them for clarification before submitting.

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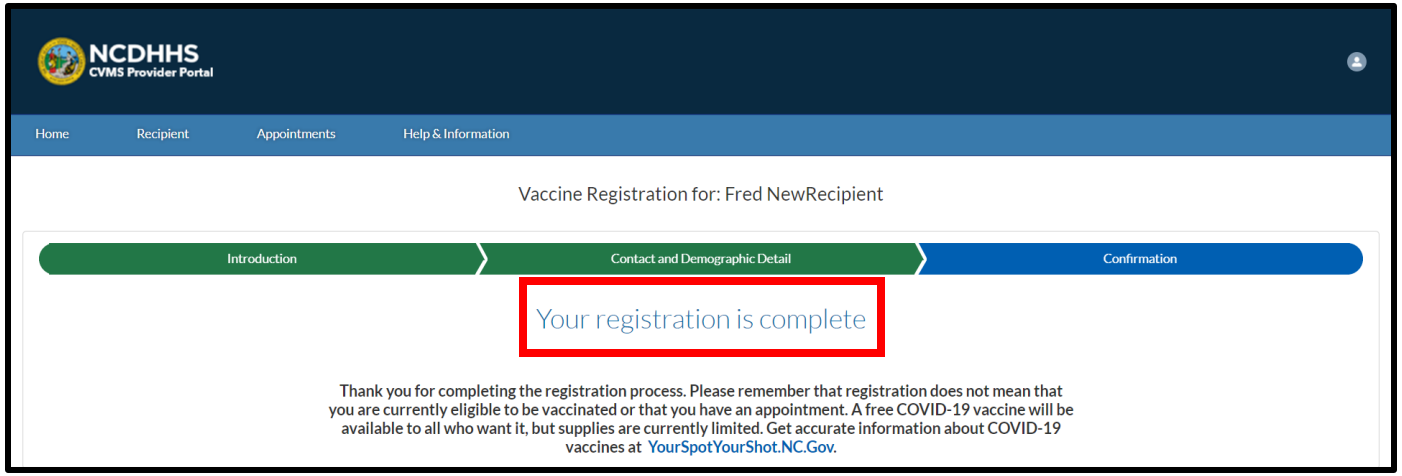
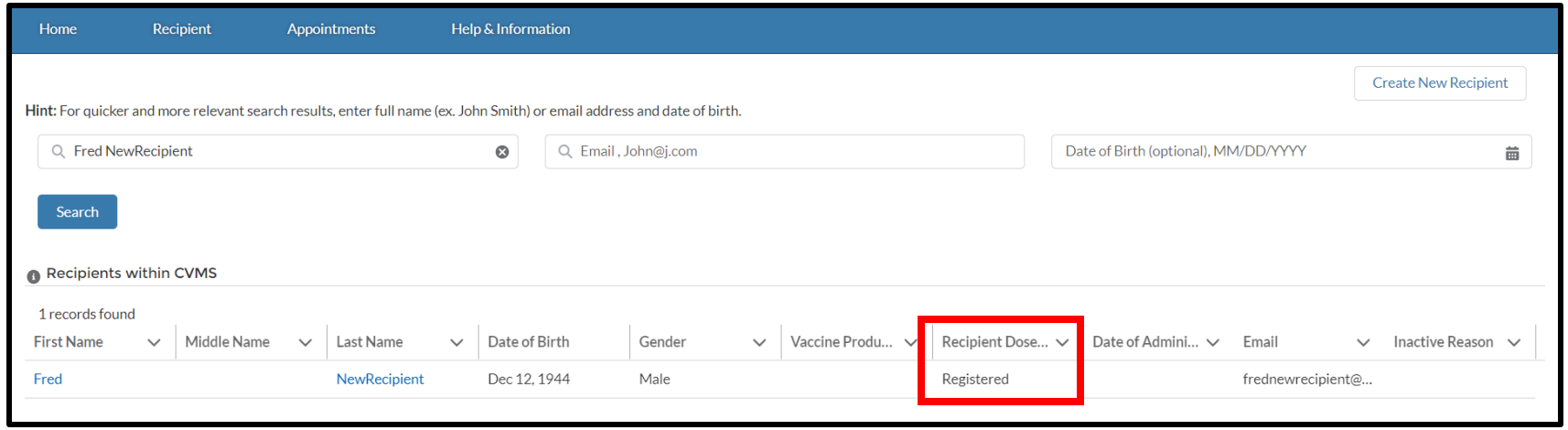
Step 9 of 9: Verify the Recipient's Registration

1. The **REGISTRATION IS COMPLETE**
2. The recipient's **RECIPIENT DOSE STATUS** is updated to **REGISTERED** and is visible on the Recipient tab





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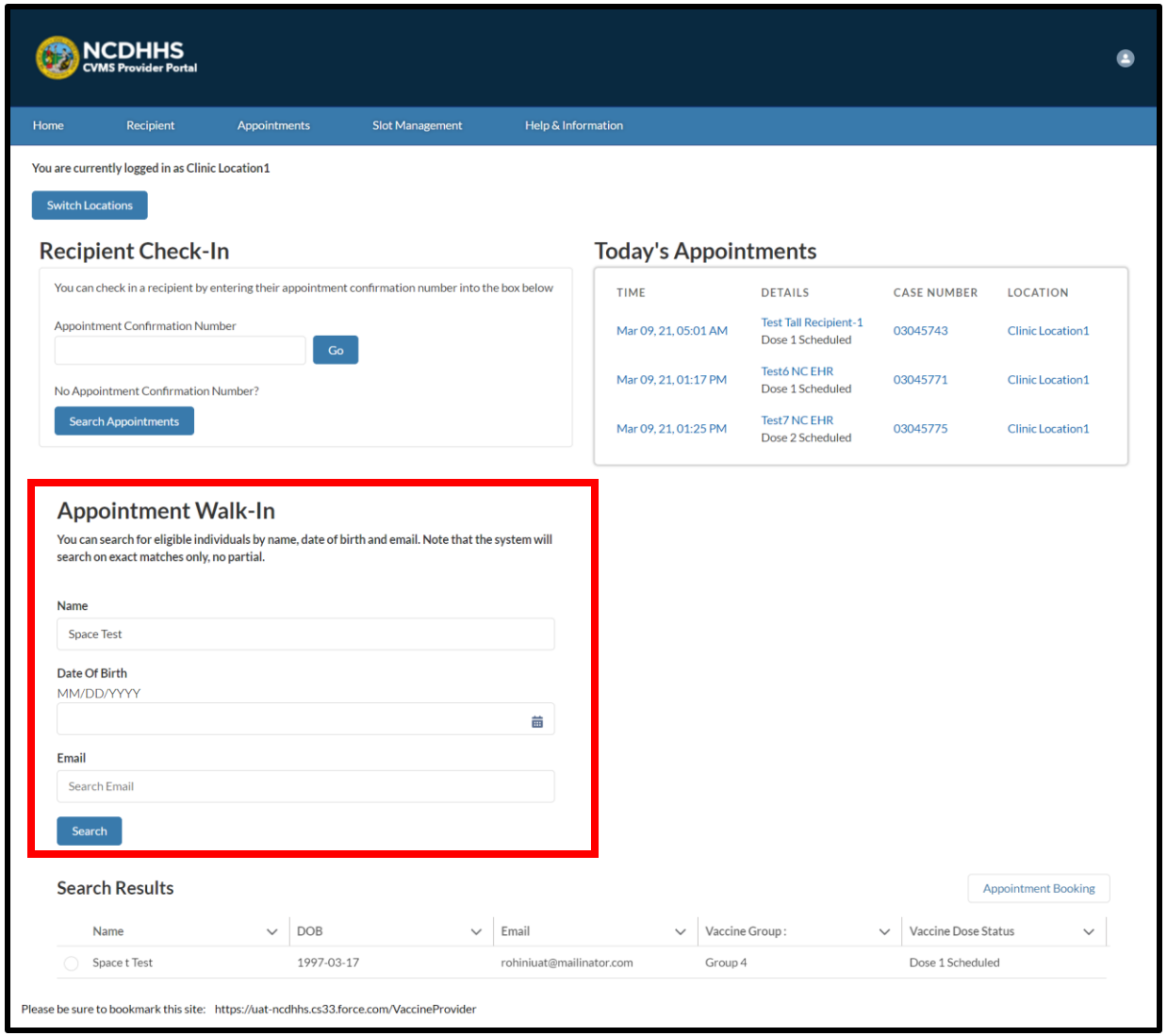
Tips

If the recipient informs you that their health information is **NOT CORRECT**, ask the recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL** or you can directly edit the registration information in the CVMS Provider Portal.

Finalize Walk-In Appointment Booking

Now that the recipient has been registered successfully, you can return to the **HOME** page and follow the Standard **APPOINTMENT WALK-IN** Booking process.



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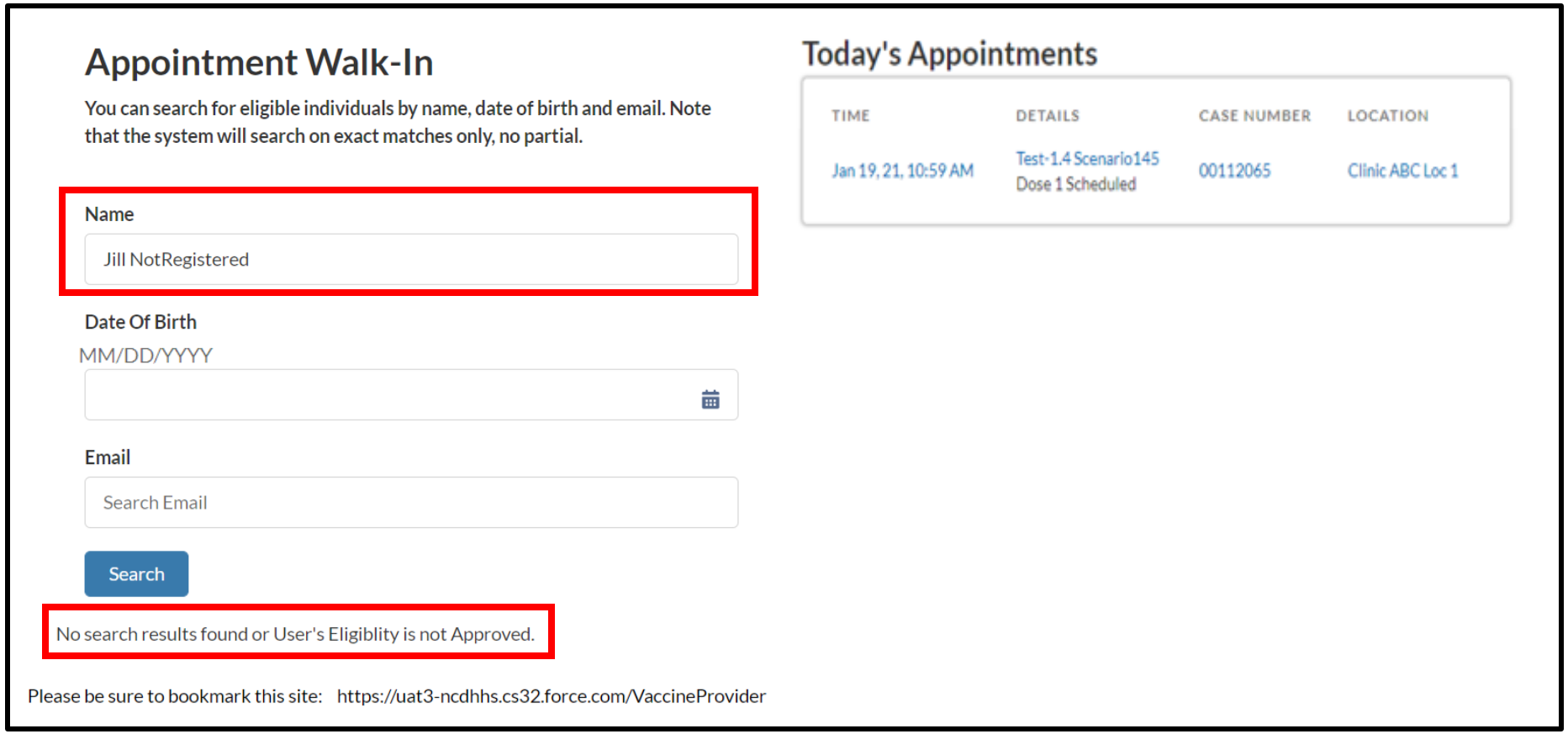
Exception 2: Recipient Record is Created in CVMS, but Recipient did not Complete Registration

Step 1 of 7: Navigate to the CVMS Provider Portal Home Page

The process to register an existing recipient begins on the **HOME PAGE.** You will verify that the recipient's name does not appear in the **APPOINTMENT WALK-IN TOOL**. Similar to the previous scenario, this means that the recipient is either not registered or does not have a record.



Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

If the recipient does appear in the **APPOINTMENT WALK--IN TOOL**, refer to **Standard Point of Care Walk-in Appointment** section of this User Guide.

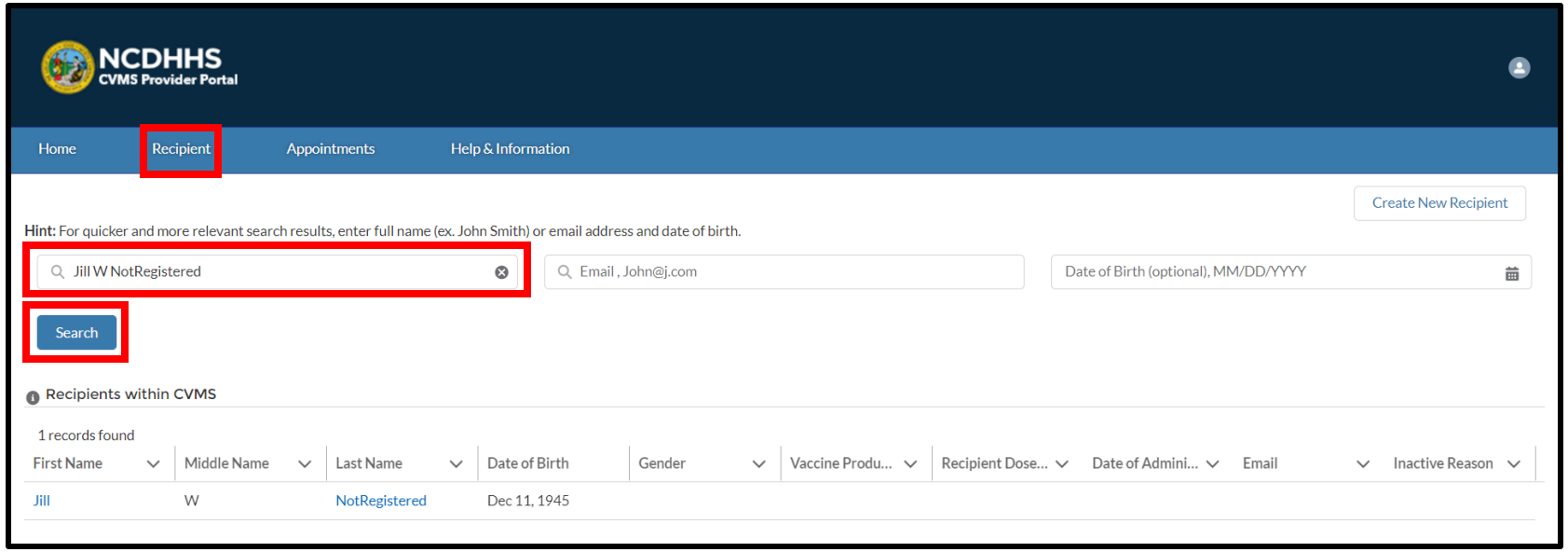
Step 2 of 7: Search for the recipient

To check for the recipient's record, search for them in the **RECIPIENT** tab.

1. Navigate to the **RECIPIENT** tab
2. Enter the recipient's **NAME** (first name and last name) in the search bar, being sure to enter at least three characters to receive any results
3. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself

4. Click **SEARCH**



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

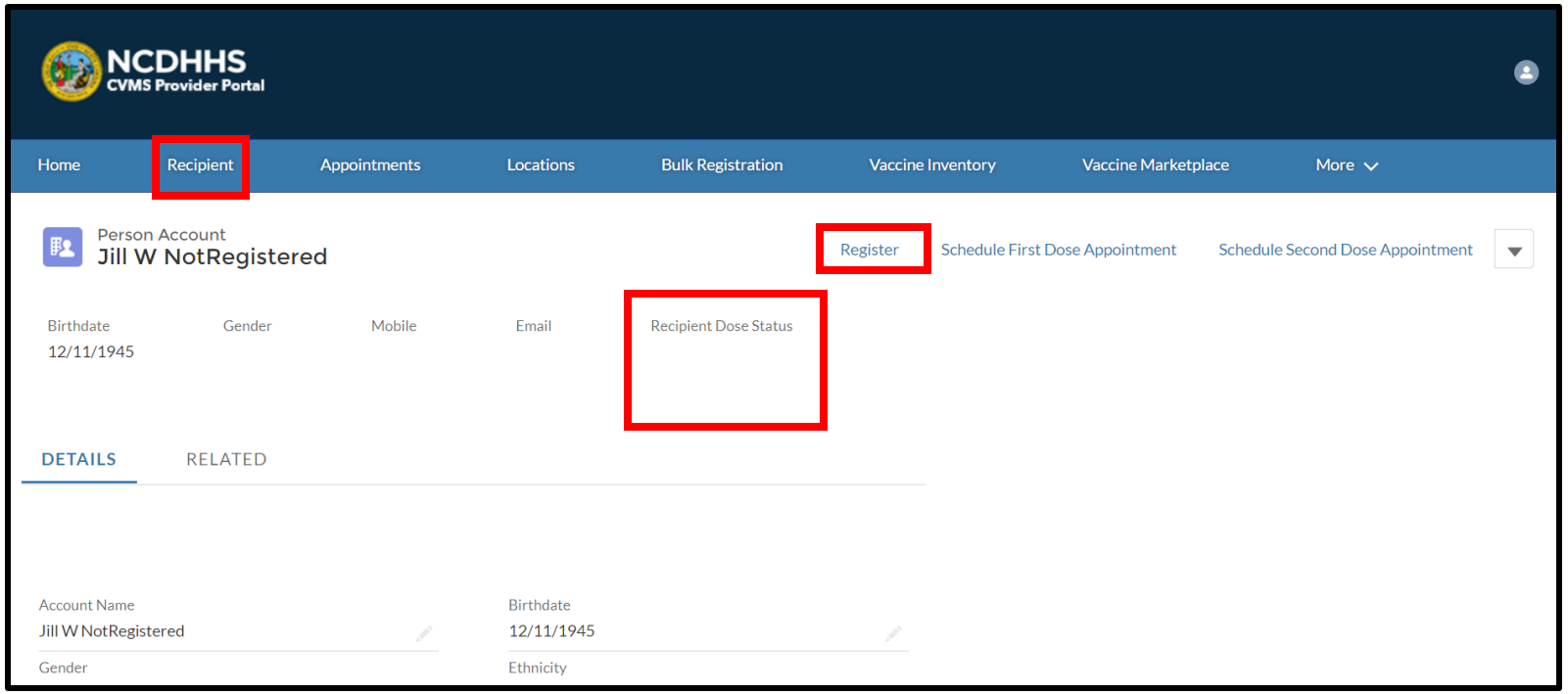
You will not be able to log a recipient vaccine administration if the recipient is not registered in CVMS.

Registration is complete when a recipient's answers to the COVID-19 Vaccine Registration form are entered into CVMS.

Step 3 of 7: Verify the Recipient's Registration

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in the **RECIPIENTS WITHIN CVMS** section. You will be able to verify that the recipient has a record but is not yet registered.

1. Click on the recipient's **NAME** to open the recipient's record
2. Verify that the recipient is not yet registered by confirming their **RECIPIENT DOSE STATUS** is blank
3. If the recipient is not yet registered, select the **REGISTER** button



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

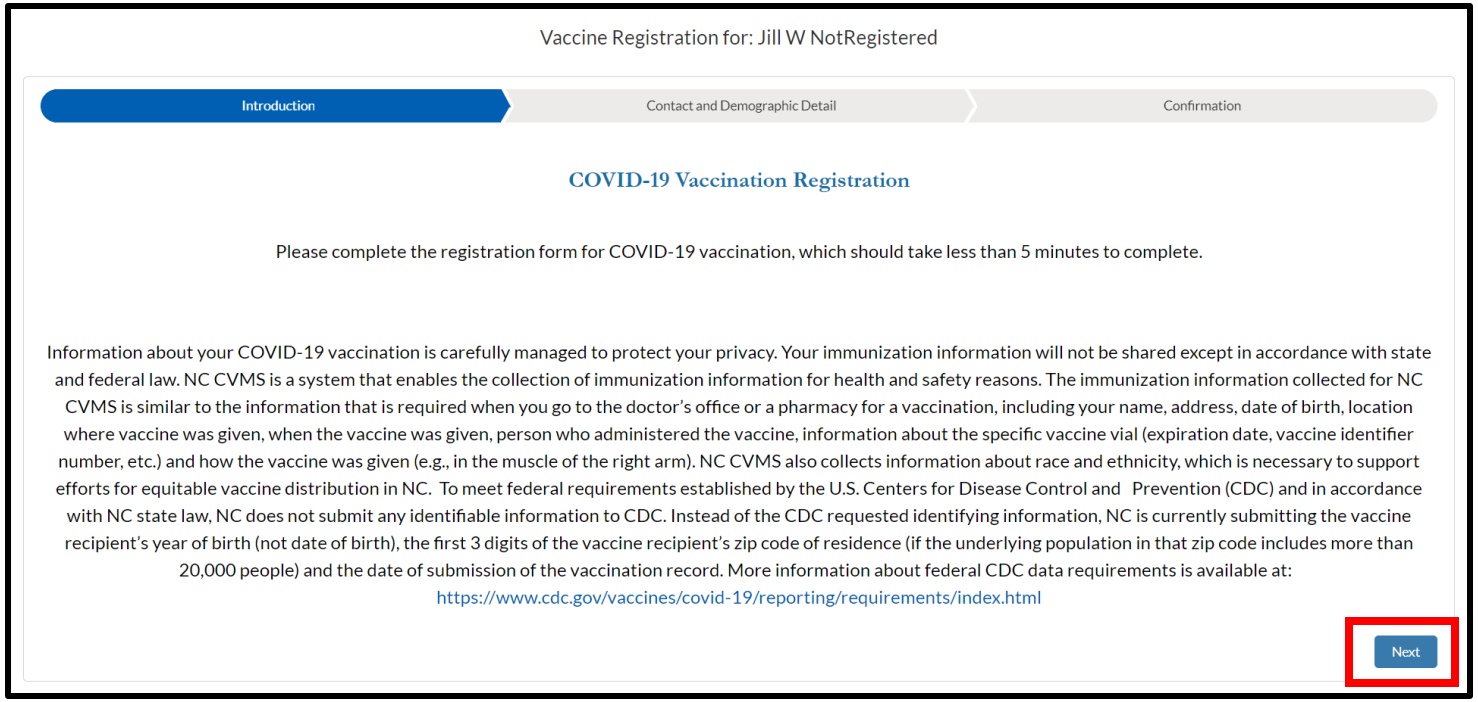
Tips

For more information on how to handle recipient search results that appear in the **RECIPIENTS FROM LONG TERM CARE/ FEDERAL PHARMACY PROGRAMS** section, please see the **Other Operations in Recipient Point of Care** portion of this User Guide.

Step 4 of 7: Collect the Recipient's Demographic Information

Just as when registering a new recipient, a new browser tab will open for you to fill out the recipient's **COVID-19 Vaccine Registration form.**

1. Instruct the recipient to fill out a paper copy of the COVID-19 Vaccine Registration form (the PDF file is available under the **HELP & INFORMATION TAB** or on the NCDHHS website at https://covid19.ncdhhs.gov/recipient-registration-and-vaccine-administration-form (English) and https://covid19.ncdhhs.gov/recipient-registration-and-covid-19-vaccine-administration-form-spanish (Spanish)
2. Click **NEXT**



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Print several copies of the **COVID-19 Vaccine Registration form** to keep on hand for other recipients.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 5 of 7: Enter the Recipient's Demographic Information

1. Enter the recipient's demographic information entered by the recipient on **COVID-19 Vaccine Registration form**
2. Click **NEXT**

Vaccine Registration for: Jill W NotRegistered

Introduction | Contact and Demographic Detail | Confirmation

Please provide the information below. Items with a * are required.

*First Name: Jill
Middle Name: W
*Last Name: NotRegistered
*Address Line 1
Address Line 2
*City
*County: --None--
*State: --None--
*Zip Code
Email (Will allow you to access your vaccine information in the COVID-19 Vaccine Portal.)
Home Phone
Mobile Phone
*The best way to contact you: --None--
*Date of Birth (MM/DD/YYYY): Dec 11, 1945
*Race: --None--
*Ethnicity: --None--
*Gender: --None--
Preferred Language: --None--

*Providing a Language preference will not provide translated text/communication, except Spanish.

Please check all disabilities that apply to you:

- [x] Not Disabled
- [ ] Cancer
- [ ] Cognitive (Psychological or Psychiatric)
- [ ] Neurological
- [ ] Physical (Mobility)
- [ ] Respiratory
- [ ] Sensory (Vision or Hearing)
- [ ] Other (Please Specify)

Next

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

We strongly encourage recipients to provide a valid email address as it will give them access to the COVID-19 Vaccine Portal, from where they can download their Vaccine Information PDF.

If a recipient lives in an apartment or suite, use the optional **ADDRESS LINE 2** field.

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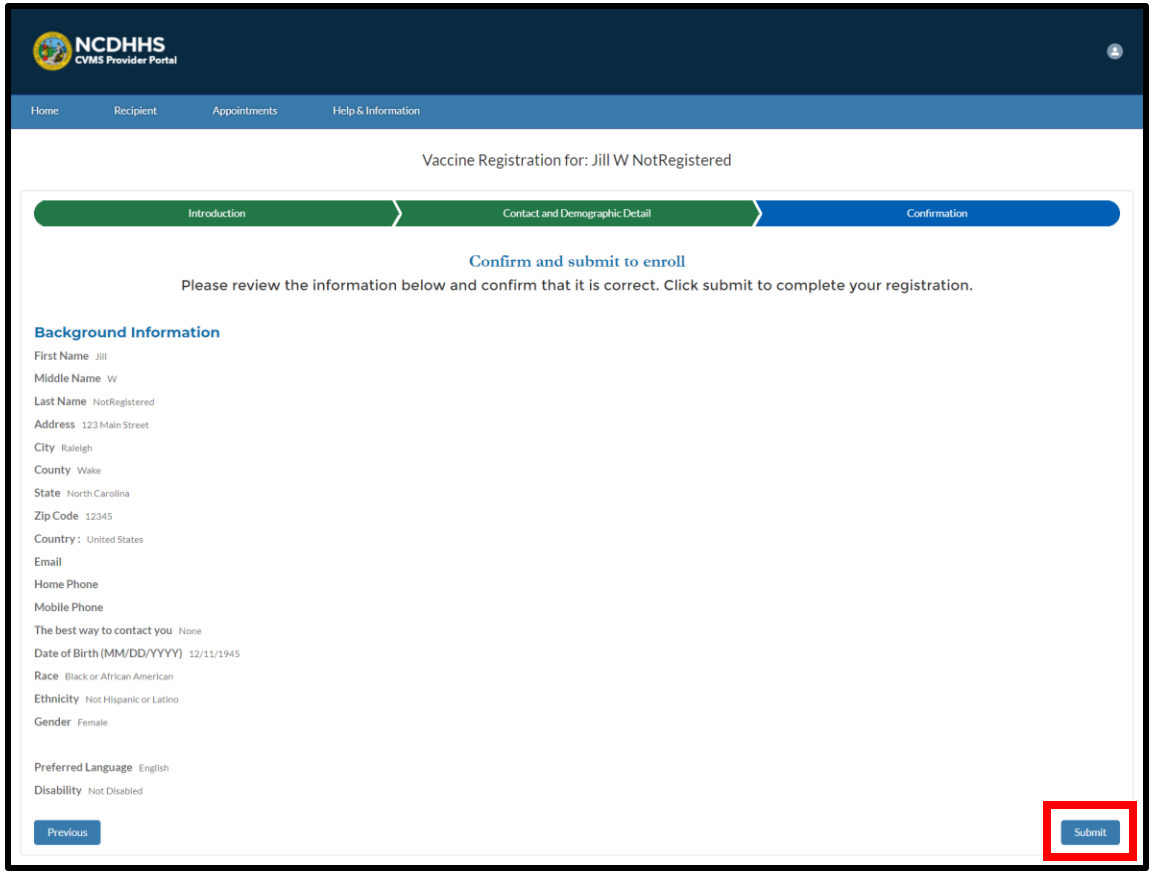
Step 6 of 7: Submit the Recipient's Information

Review the information you entered from the paper copy of the recipient's **COVID-19 Vaccine Registration form**.

1. Review that the information entered matches the information given by the recipient
2. To make changes, select **PREVIOUS**
3. If the information is correct, select **SUBMIT**



Audience

Healthcare Provider

Healthcare Location Manager

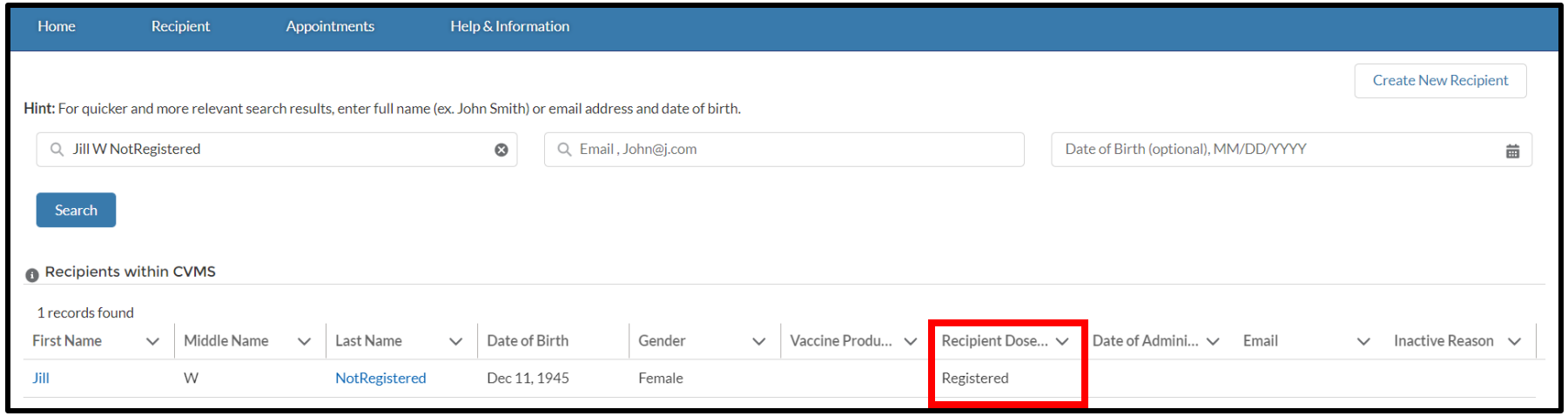
Statewide Location Manager

Tips

If you have any questions about what a recipient wrote on the paper form, ask them for clarification before submitting.

Step 7 of 7: Verify the Recipient's Registration

1. The **REGISTRATION IS COMPLETE**
2. The recipient's **RECIPIENT DOSE STATUS** is updated to **REGISTERED** and is visible on the Recipient tab



Audience

Healthcare Provider

Healthcare Location Manager

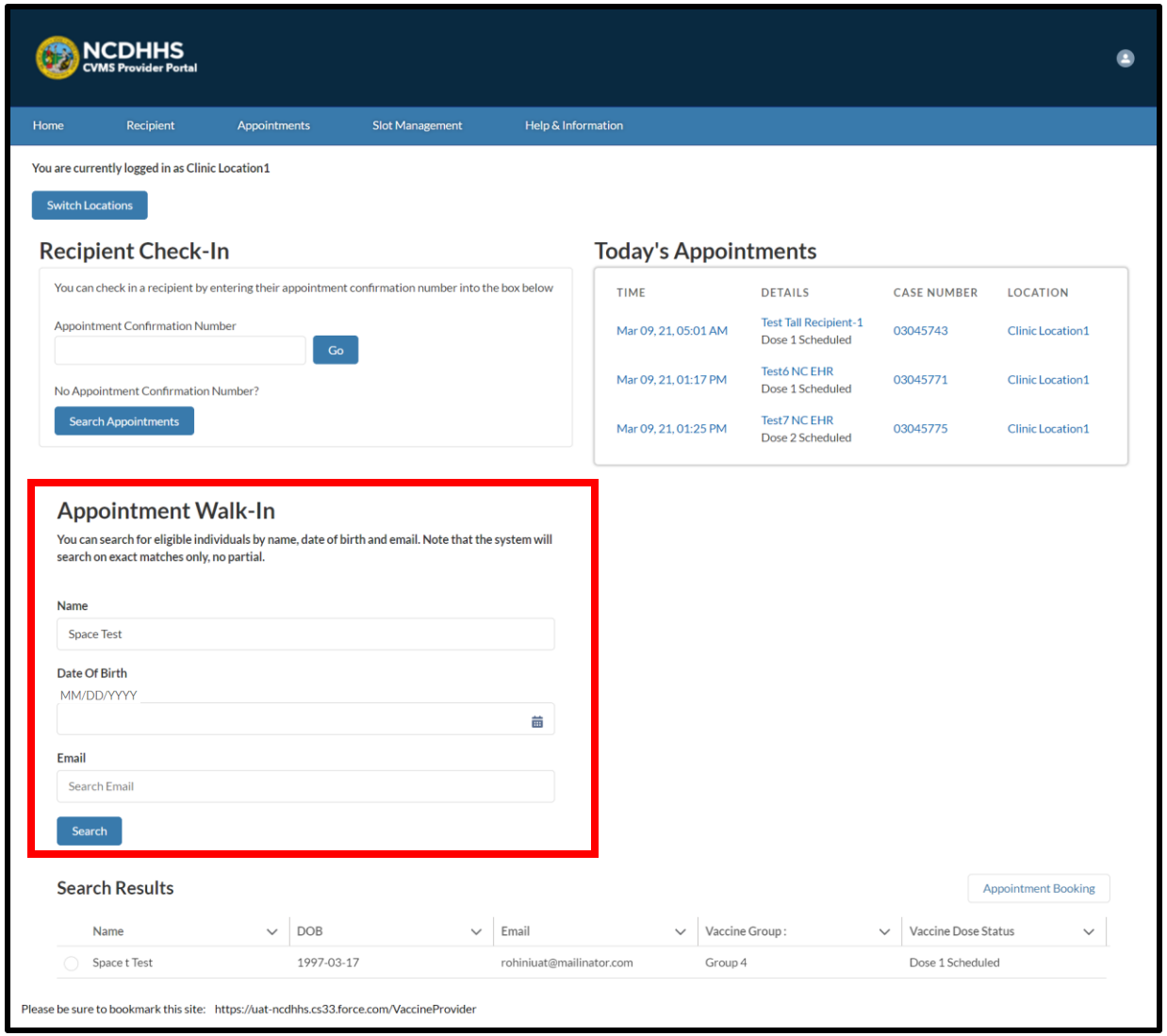
Statewide Location Manager

Tips

If the recipient informs you that their health information is **NOT CORRECT**, ask the recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL** or edit the registration information yourself directly through the CVMS Provider Portal.

Finalize Walk-In Appointment Booking

Now that the recipient has been registered successfully, you can return to the **HOME** page and follow the standard **APPOINTMENT WALK-IN** Booking process.



Audience

Healthcare Provider

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Statewide Location Manager

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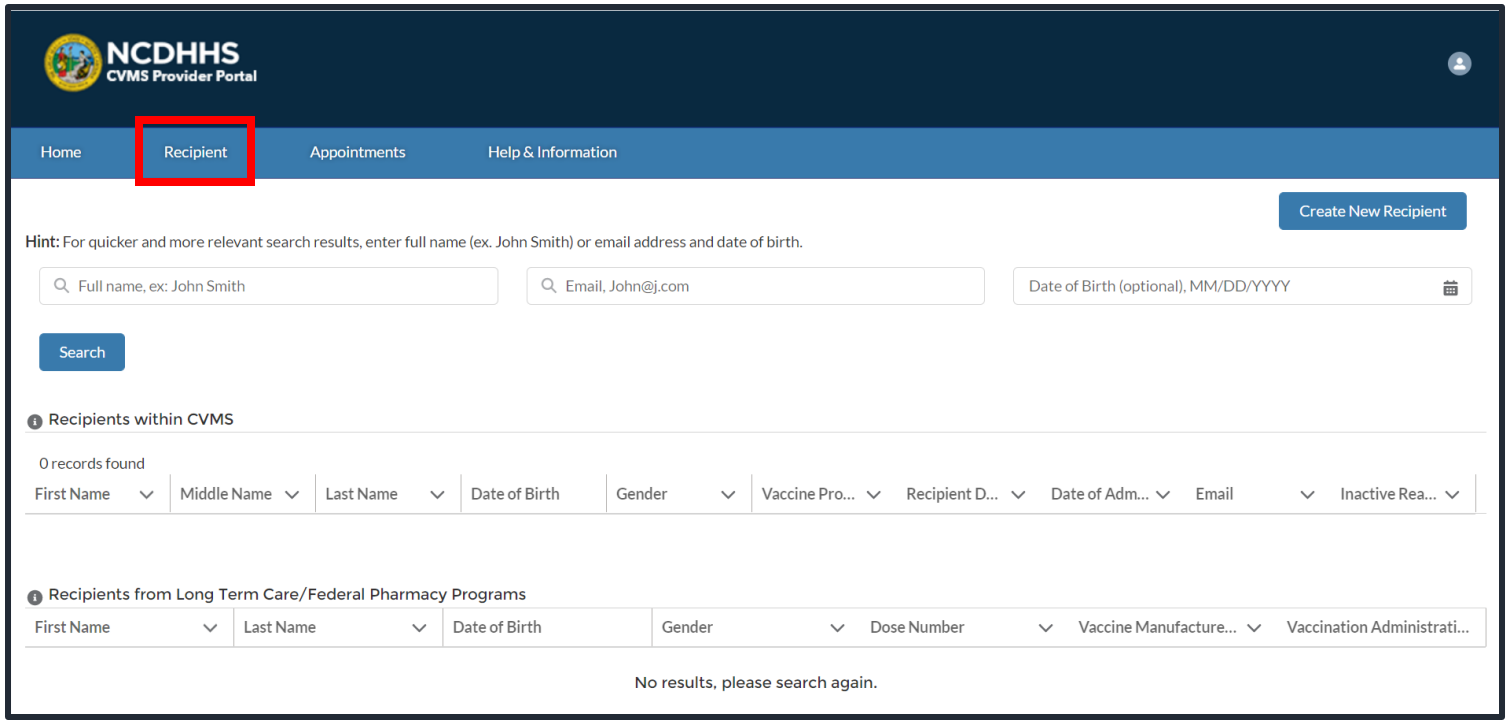
Exception 3: Looking Up A Recipient Who Received Their First Dose Through a Long-Term Care Facility or Federal Partnering Pharmacy

Step 1 of 5: Navigate to the Recipient Tab

The federal government has an agreement with pharmacy partners (e.g., CVS, Walgreens) to vaccinate Long Term Care Facility and Nursing Homes residents and staff. These pharmacy partners and other Federal Pharmacy Programs do not use CVMS, but instead upload their vaccination records directly to the CDC.

Even if a recipient received their first dose through a pharmacy partner, they could receive their second dose from a healthcare provider enrolled in CVMS. To vaccinate them, you will have to register them following **EXCEPTION 1** instructions. Note that CVS and Walgreens share some data with CVMS, and you can verify the recipient first dose record before administering a second dose within CVMS if you wish to confirm what product they received and if enough time passed since their first dose.

1. Begin by navigating to the **RECIPIENT** tab from the CVMS Provider Portal Home Page.



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

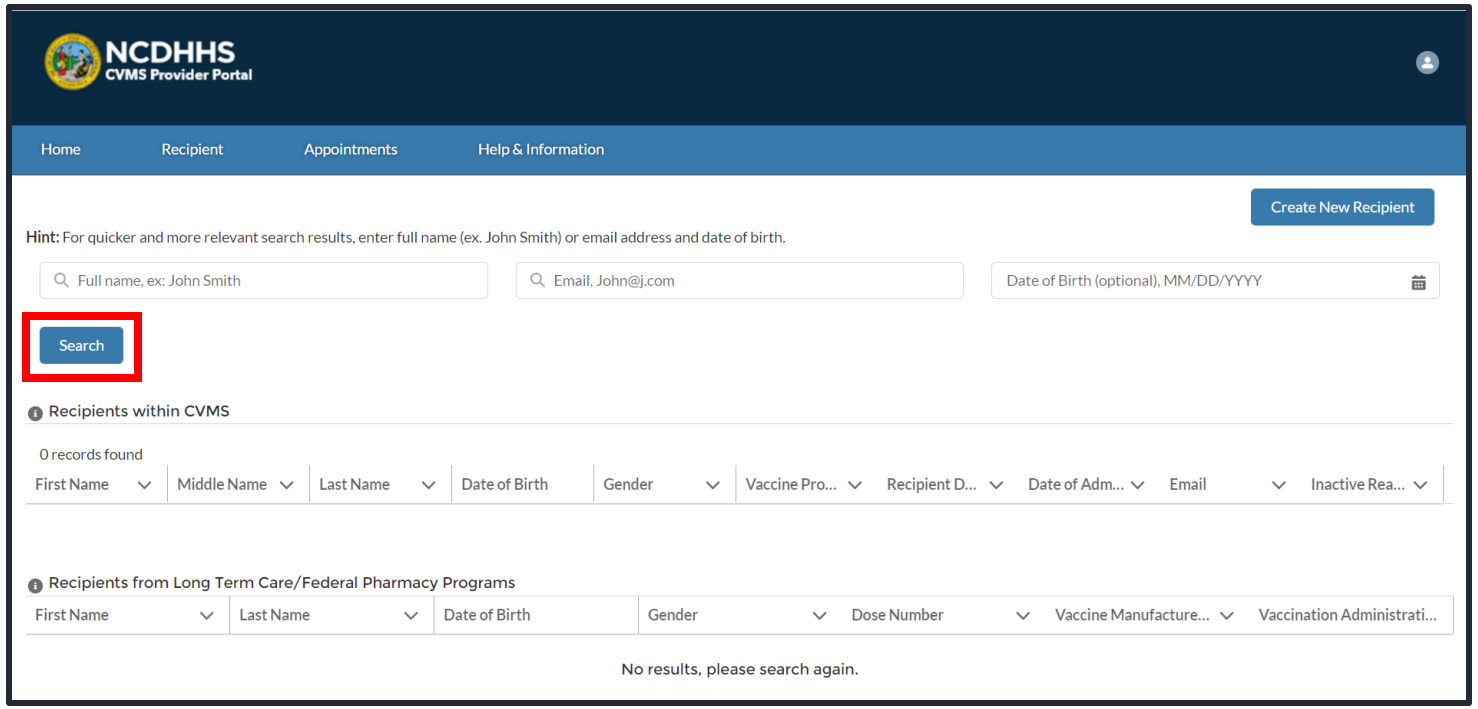
Step 2 of 5: Search for the Recipient

To check for the recipient's record, search for them in the **RECIPIENT** tab.

1. Enter the recipient's **NAME** (first name and last name) in the search bar
2. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself

3. Click **SEARCH**



Audience

Healthcare Provider

Healthcare Location Manager

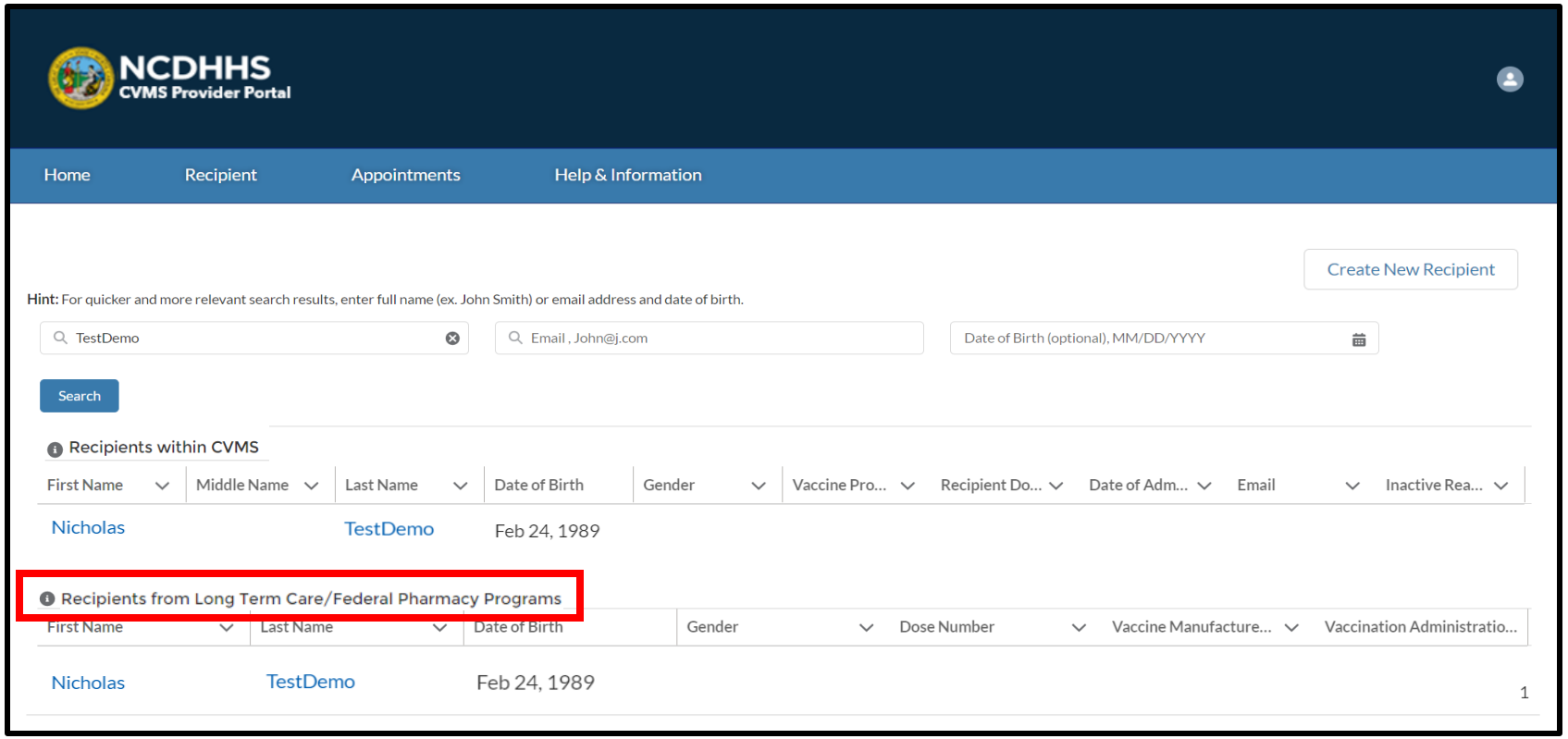
Statewide Location Manager

Tips

It is possible that the recipient has a result in both the **RECIPIENTS WITHIN CVMS** and the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section. A search result in the first section means they have a record in CVMS. A search result in the second section means they received a vaccine dose through a Federal Pharmacy Partner.

Step 3 of 5: Search for the Recipient

1. Locate the **CORRECT** recipient in the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section of the search results
2. The recipient may also appear as a search result in the **RECIPIENTS WITHIN CVMS** section. In that instance, note the **RECIPIENT DOSE STATUS** to see if CVMS has a record of the recipient's first dose
3. Click on the recipient's name in the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section



Audience

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Healthcare Location Manager

Statewide Location Manager

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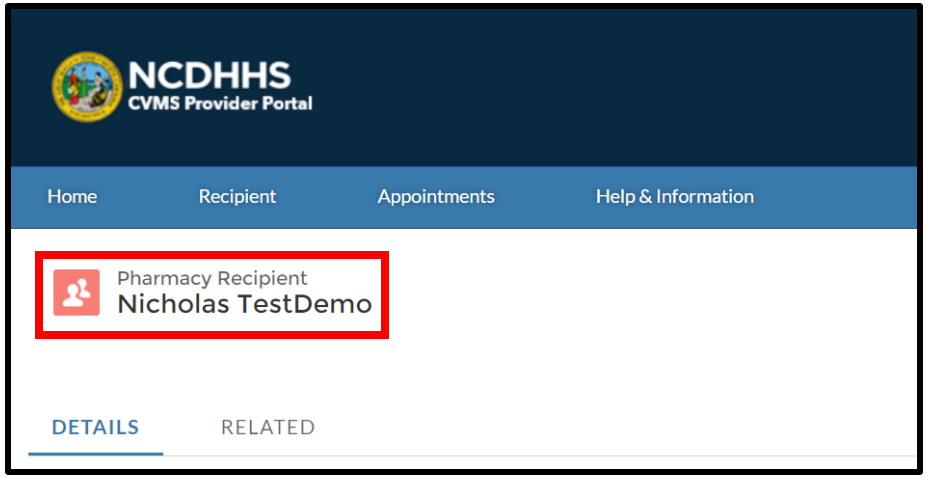
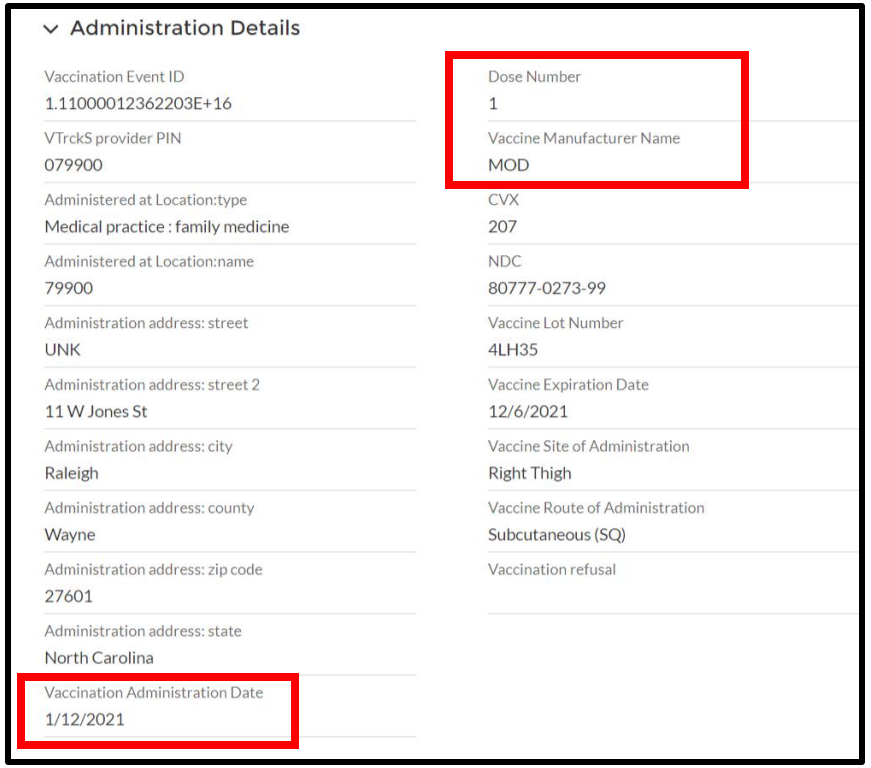
Step 4 of 5: View the Recipient's Pharmacy Record

Clicking the recipient's name in the **RECIPIENTS FROM LONG TERM CARE/FEDERAL PHARMACY PROGRAMS** section will open the recipient's **PHARMACY RECIPIENT** record. This record has no connection to a CVMS Recipient Record and is used only as reference data.

1. Scroll down in the **PHARMACY RECIPIENT** record to determine when the recipient received their first dose
2. If the recipient is eligible for their second dose, use the information in the **PHARMACY RECIPIENT** record to determine which COVID-19 vaccine product the recipient should receive





Audience

Healthcare Provider

Healthcare Location Manager

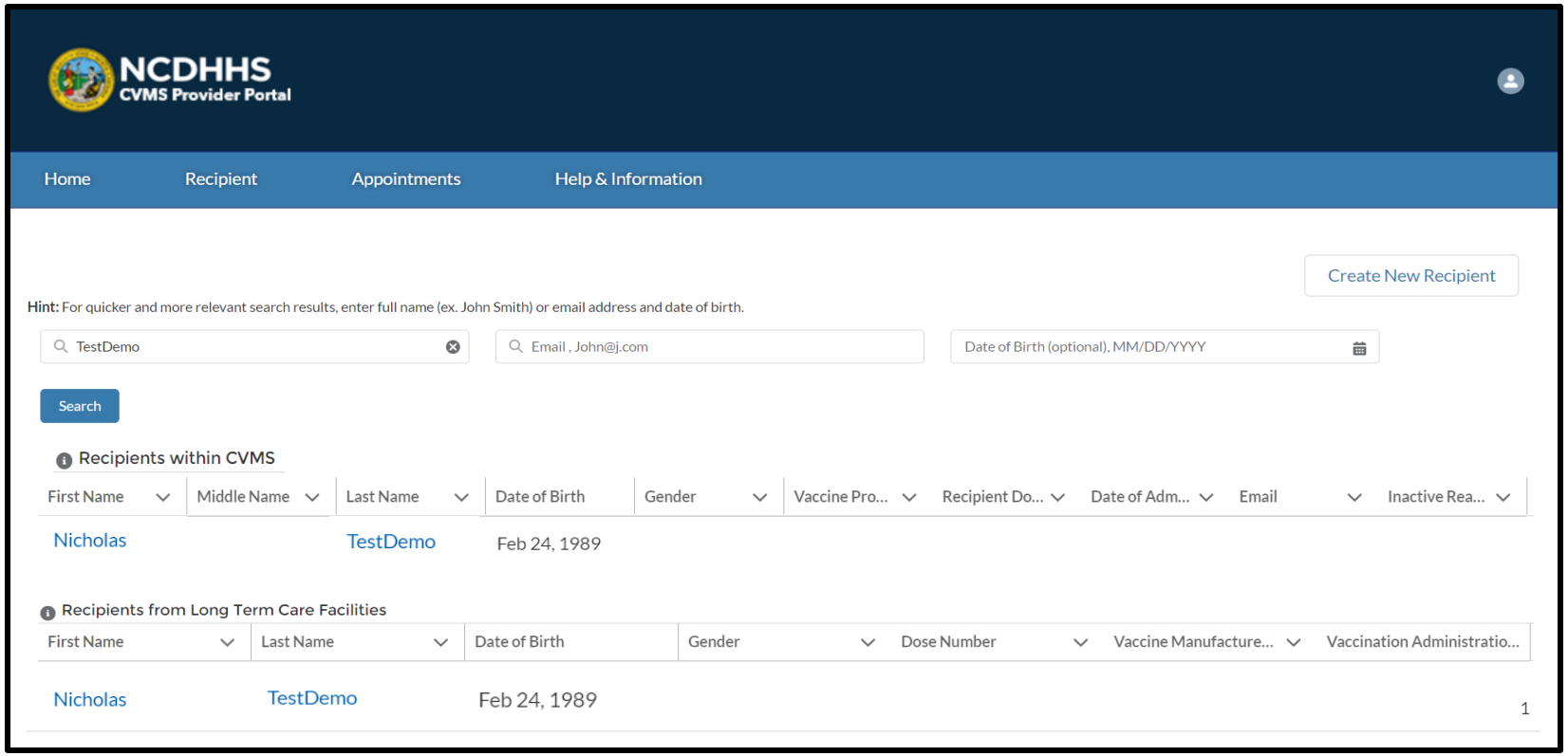
Statewide Location Manager

Tips

The **PHARMACY RECIPIENT** record will indicate which pharmacy administered the vaccine, as well as the Vaccine Manufacturer Name, date of vaccination, and other relevant information.

Step 5 of 5: Other Considerations

1. If the recipient has no record in CVMS, refer to the **EXCEPTION 1** portion of this User Guide to create their CVMS recipient record and register them on-site. Then follow the standard **APPOINTMENT WALK-IN** Booking process
2. If the recipient has a record in CVMS, but is not registered, refer to the **EXCEPTION 2** portion of this User Guide to conduct on-site registration. Then follow the standard **APPOINTMENT WALK-IN** Booking process



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Keep a tab open with the **PHARMACY RECIPIENT** record when administering the second dose of the COVID-19 vaccine, since it will not appear in the **FIRST DOSE DETAILS** section of the Vaccine Administration details.

Documenting a Vaccine Administration

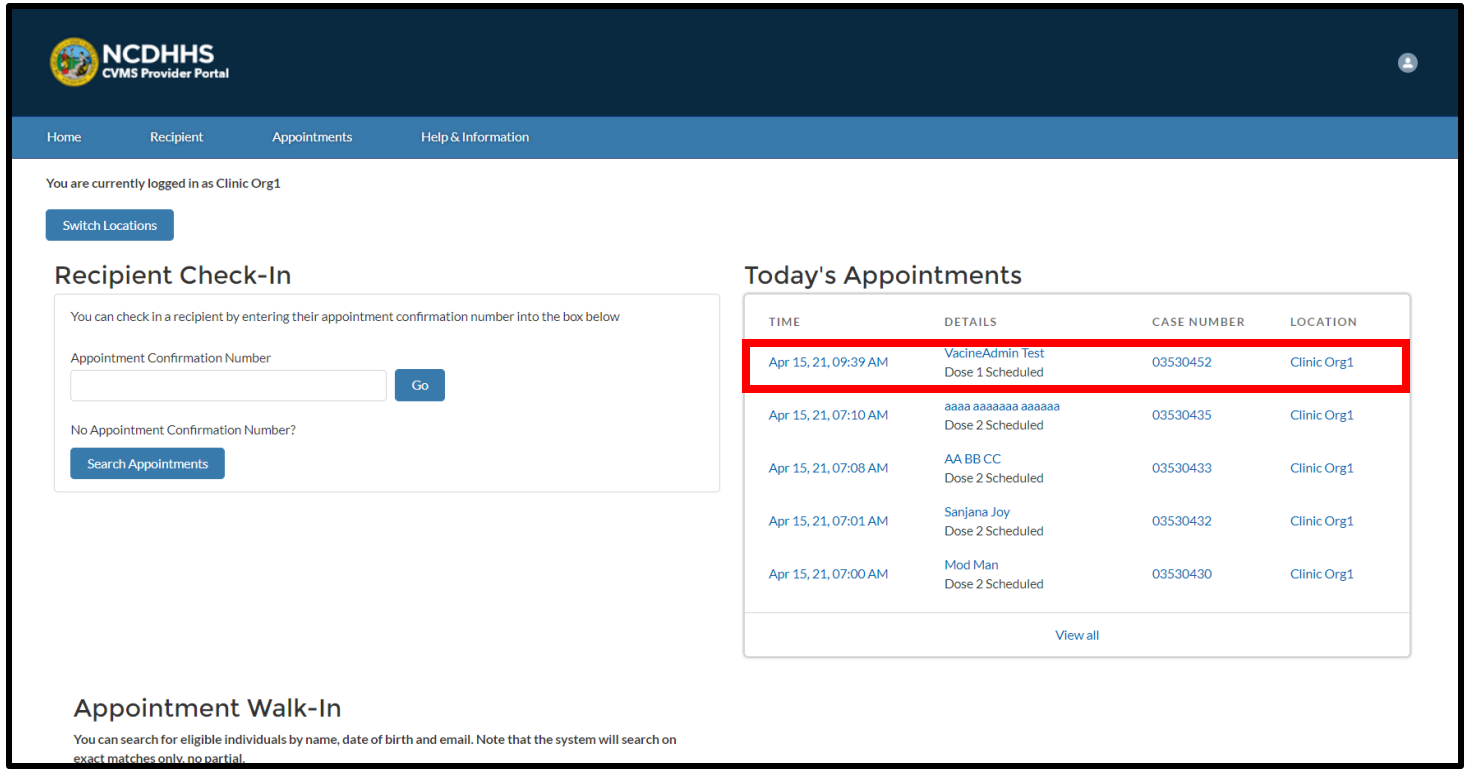
Enter Vaccine Administration Record

Step 1 of 10: Begin Vaccine Administration

There are three methods to begin the **VACCINE ADMINISTRATION** process.

When a **RECIPIENT** walks in to receive their COVID-19 vaccine and they do not have a scheduled appointment, the provider who initially verifies their identity will create an Appointment Booking for the recipient.

The provider who will administer the COVID-19 vaccine will select the recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE** which will begin the **VACCINE ADMINISTRATION** process.



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

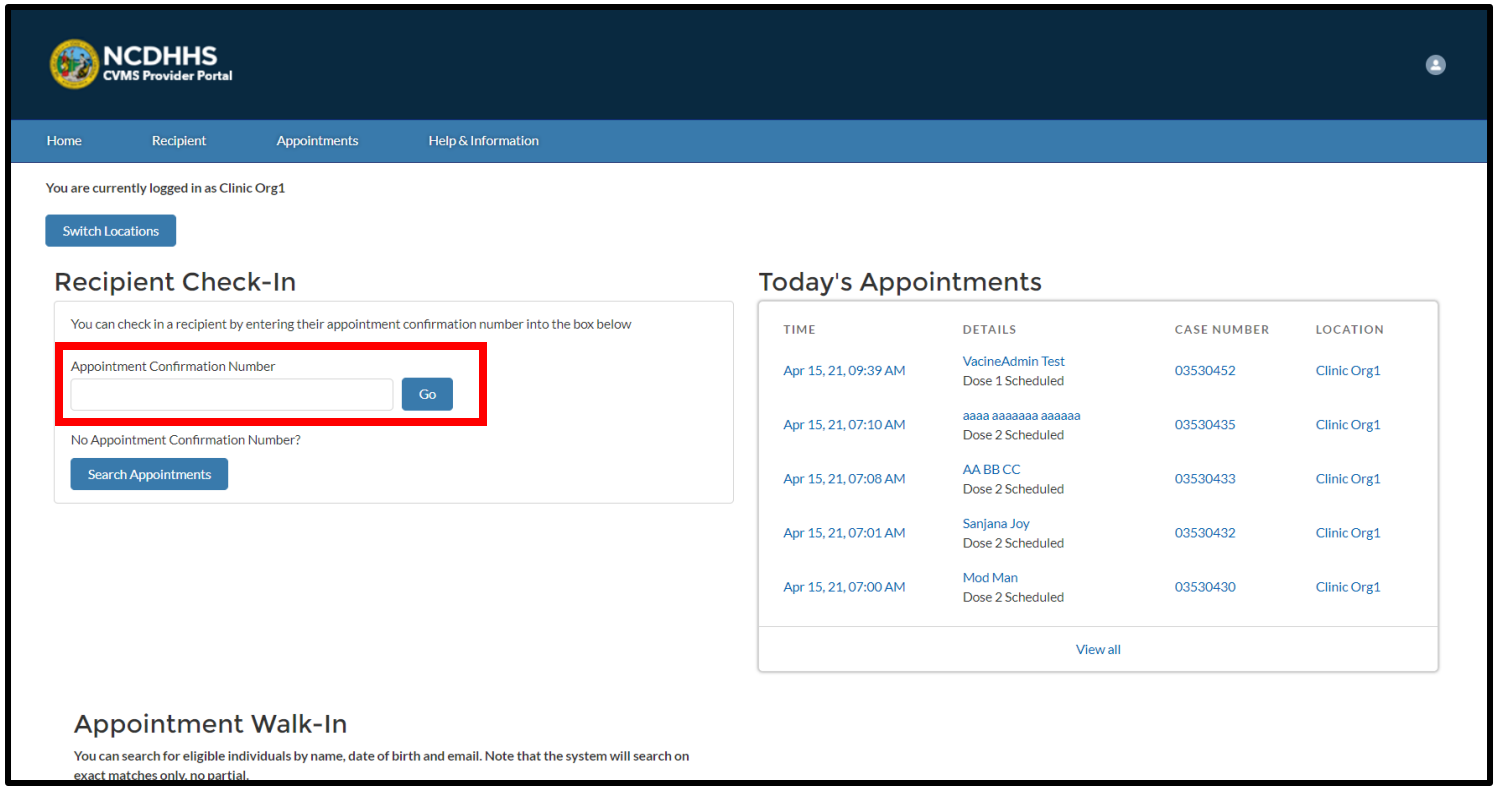
To review how to check-in a recipient through the Appointment Walk-In tool, review the **Booking Walk-In Appointments** section of this User Guide.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 2 of 10: Begin Vaccine Administration

Alternatively, if you are a provider that has signed up for the scheduling feature in CVMS, you can begin the **VACCINE ADMINISTRATION PROCESS** by entering the recipient's **APPOINTMENT CONFIRMATION NUMBER** that they received after scheduling their appointment online using the scheduling feature in CVMS.

1. Enter the **APPOINTMENT CONFIRMATION NUMBER** for the recipient
2. Click **GO**



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

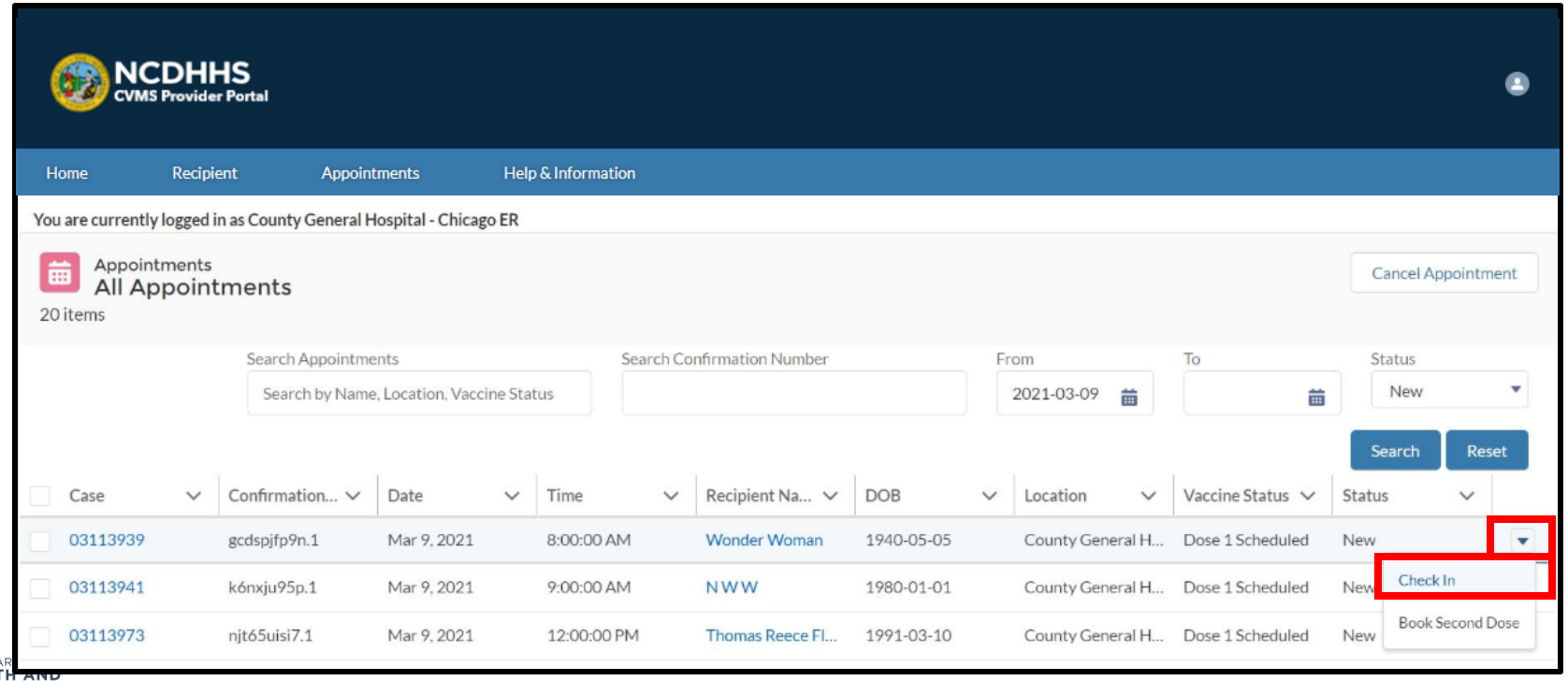
Tips

For information on how to enable the scheduling feature in CVMS, please refer to the **Step 10 – Invite Recipients to Self-Schedule Their Appointments User Guide** at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#).

Step 3 of 10: Begin Vaccine Administration

Lastly, for those providers with access to the scheduling feature in CVMS, the **VACCINE ADMINISTRATION** process can also begin from the **APPOINTMENTS TAB.**

1. Navigate to the **APPOINTMENTS TAB**
2. Find the **CORRECT APPOINTMENT BOOKING** for the recipient you would like to begin the Vaccine Administration for
3. Click the drop-down arrow to the right of their name
4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**



Audience

- **Healthcare Provider**
- **Healthcare Location Manager**
- **Statewide Location Manager**

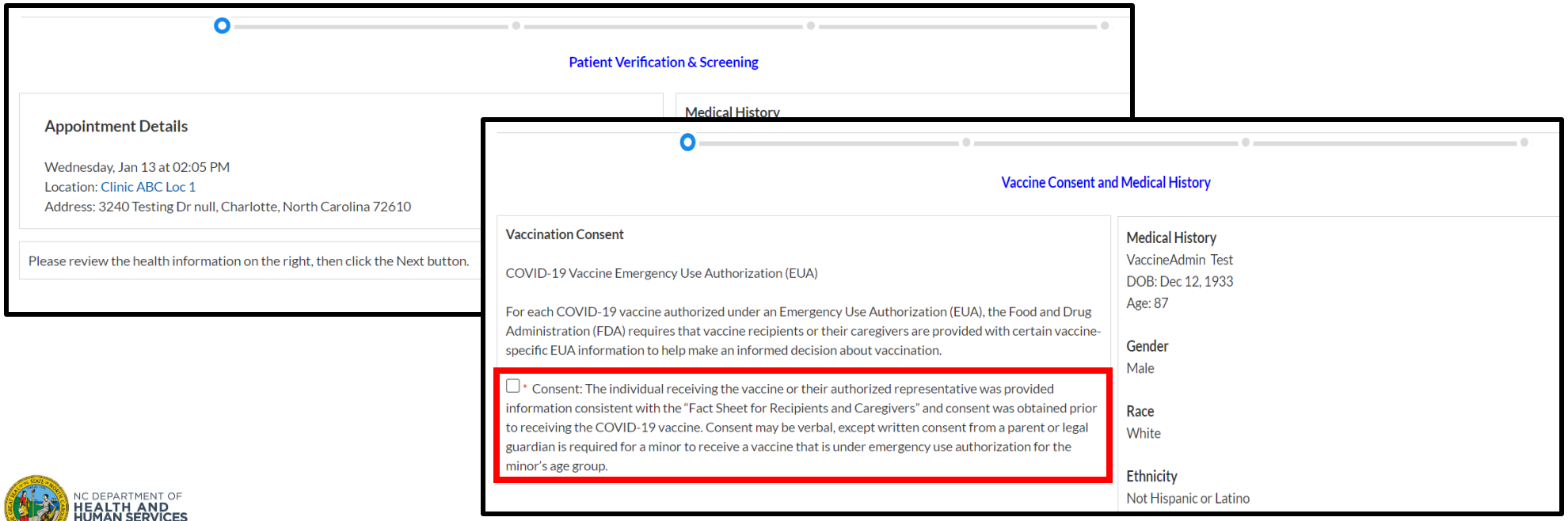
NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 4 of 10: Receive Verbal Consent

Beginning the **VACCINE ADMINISTRATION** process takes you to the **PATIENT VERIFICATION & SCREENING** page.

1. Review the recipient's health information on the right-hand side of the screen and click **NEXT**
2. On the **VACCINE CONSENT AND MEDICAL HISTORY** page, read the **DISCLOSURE STATEMENT** to the recipient
3. After you **RECEIVE VERBAL CONSENT**, you can **CHECK** the check box indicating that consent was provided and click **NEXT**

*Note: The recipient's **MEDICAL HISTORY** will be displayed on the right-hand side of the screen throughout the entire Vaccine Administration Process.*



Audience

- **Healthcare Provider**
- **Healthcare Location Manager**
- **Statewide Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 5 of 10: Provide the Vaccine Information Sheet / EUA Fact Sheet

Before you administer the COVID-19 vaccine, you must also **PROVIDE** the **VACCINE INFORMATION SHEET OR EMERGENCY USE AUTHORIZATION (EUA) FACT SHEET** and the **V-SAFE INFORMATION SHEET** to the recipient or guardian.

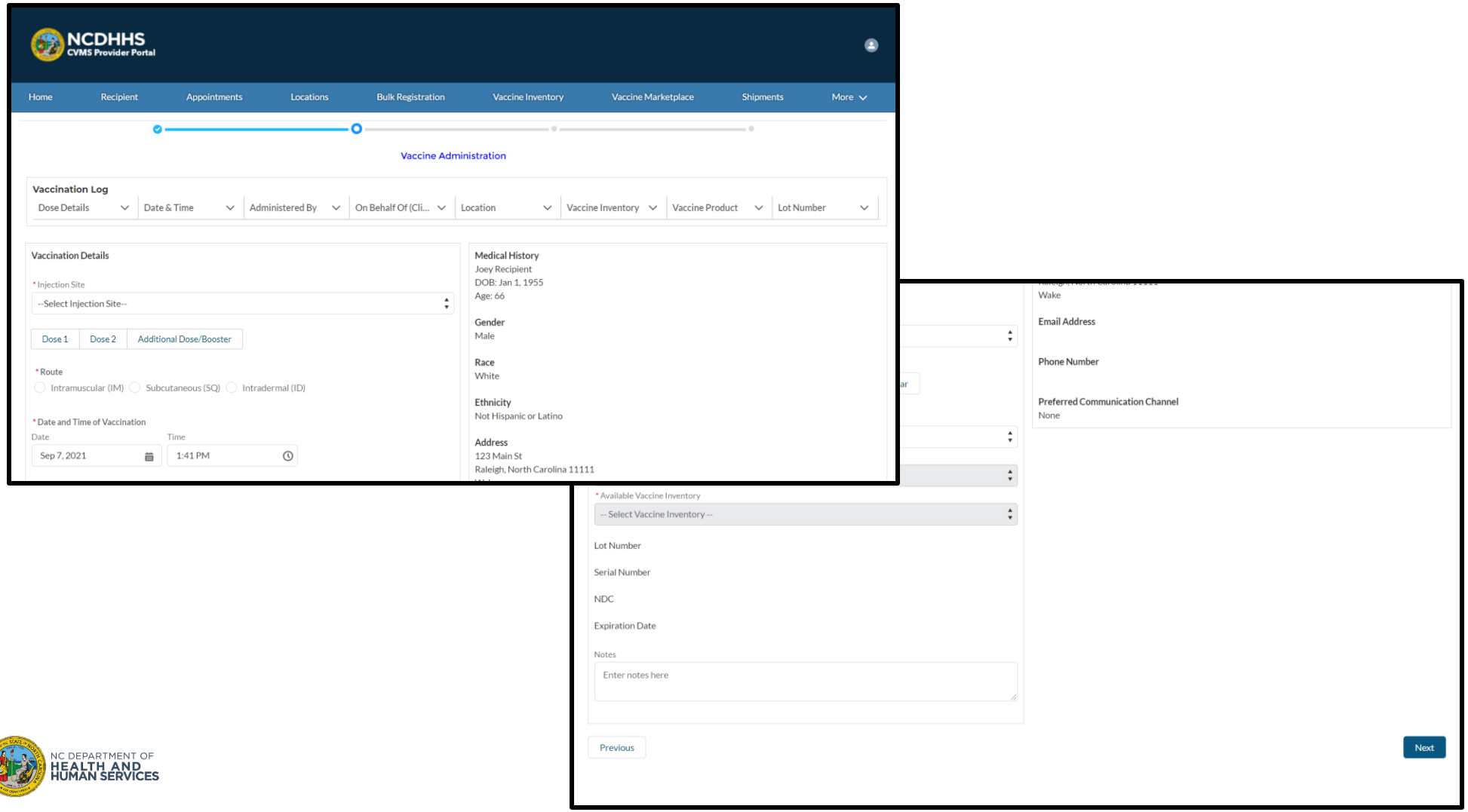
1. Obtain copies of the Vaccine Information Sheet / EUA Fact Sheet at this website
   a. Pfizer (Vaccine Information Fact Sheet): https://www.fda.gov/media/144414/download
   b. Moderna (EUA Fact Sheet): https://www.fda.gov/media/144638/download
   c. Janssen (EUA Fact Sheet): https://www.fda.gov/media/146305/download
2. Obtain copies of the V-safe Information Sheet at this website: https://immunize.nc.gov/providers/ncip/pdf/v_safe_poster_508.pdf
3. Provide the recipient or guardian with the Vaccine Information / EUA Fact Sheet prior to vaccination.
4. Ask the recipient if they have any questions about the risks and benefits of receiving the COVID-19 vaccine.
5. Counsel the recipient on the importance of enrolling in V-safe to report any adverse events following vaccination.

Audience

- **Healthcare Provider**
- **Healthcare Location Manager**
- **Statewide Location Manager**

Step 6 of 10: Review the Vaccine Administration Details

Once you receive the recipient's consent and provide them with the appropriate Vaccine Information Sheet / EUA Fact Sheet, you will continue to the **VACCINE ADMINISTRATION** page. This page is where you will **CAPTURE KEY INFORMATION** about the **COVID-19 VACCINE ADMINISTERED.**



Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

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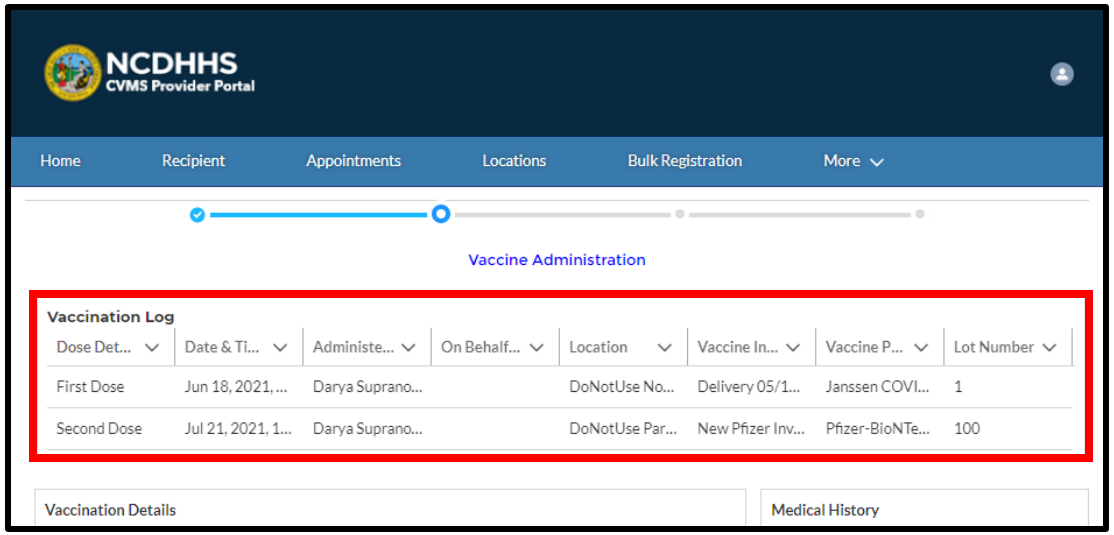
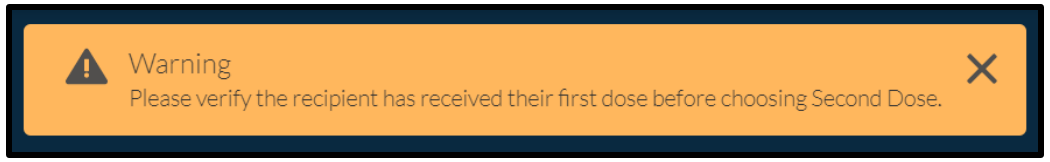
Step 7 of 10: Vaccine Administration Details for the Second Vaccine Dose





If your recipient has already **RECEIVED A DOSE** of the COVID-19 vaccine through a CVMS Provider, you will see a summary of the dose details in the **VACCINATION LOG** at the top of the **VACCINE ADMINISTRATION PAGE**.

Dose Details will include:

- Dosage (1st, 2nd, Additional)
- Date and Time
- Administered By
- On Behalf Of (Clinician)
- Location
- Vaccine Inventory
- Vaccine Product
- Lot Number

Alternately, if a recipient received a dose outside of a CVMS provider (e.g., out of state, through a Federal Pharmacy Partner), the dose will not appear in the **VACCINATION LOG**. You may still mark the administration as a **SECOND or ADDITIONAL DOSE / BOOSTER.** In that instance, a warning label will appear at the top of the screen prompting you to verify the selection.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Verify if a prior dose was given to the recipient.

Selecting **SECOND DOSE** will put the recipient into **DOSE 2 ADMINISTERED** status.

Selecting **ADDITIONAL DOSE / BOOSTER** will put the recipient into **ADDITIONAL DOSE / BOOSTER ADMINISTERED** status.

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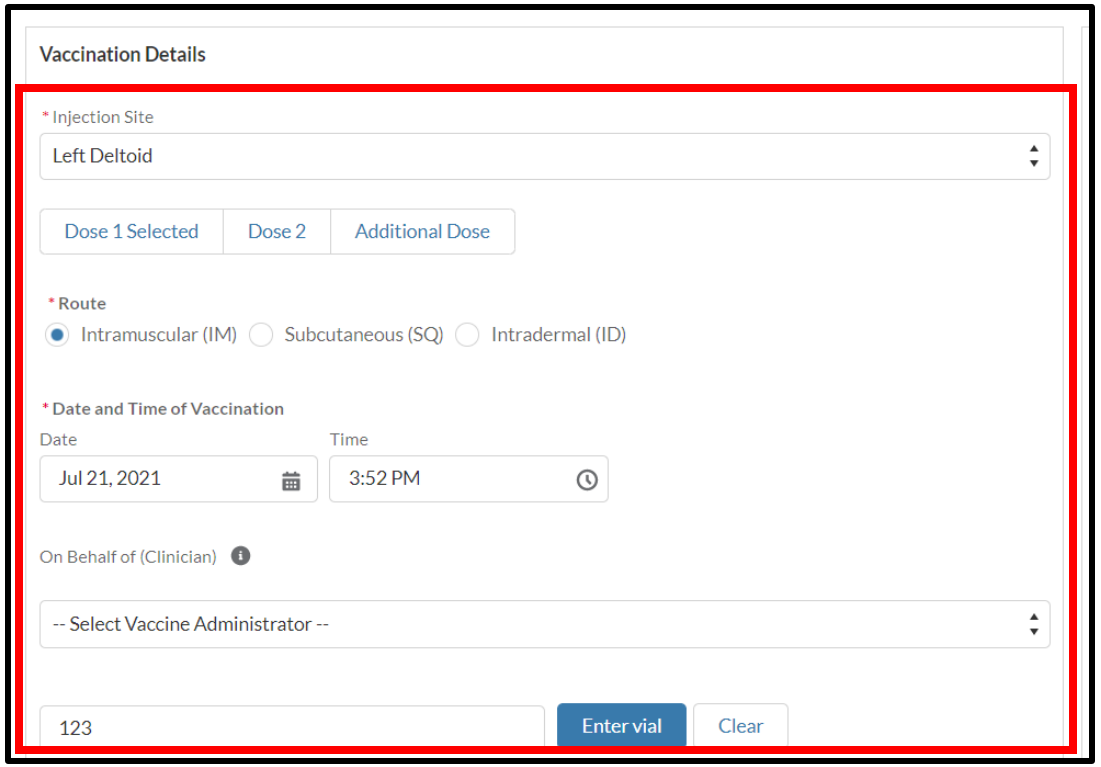
Step 8 of 10: Enter Vaccine Administration Details



On the **VACCINE ADMINISTRATION** page, you will capture all **VACCINE DETAILS**.

- Populate all **REQUIRED** vaccination details

1. Injection Site
2. Dose (See [ENTER AN ADDITIONAL DOSE / BOOSTER ADMINISTRATION] section for further considerations)
3. Route
4. Date & Time of Vaccination (This field will default to the current date and time, but can be edited to record a vaccine administered in the past)

Note: The field **ON BEHALF OF (CLINICIAN)** allows you to enter information on behalf of another clinician who administered the COVID-19 vaccine.

Audience

Healthcare Provider

Healthcare Location Manager

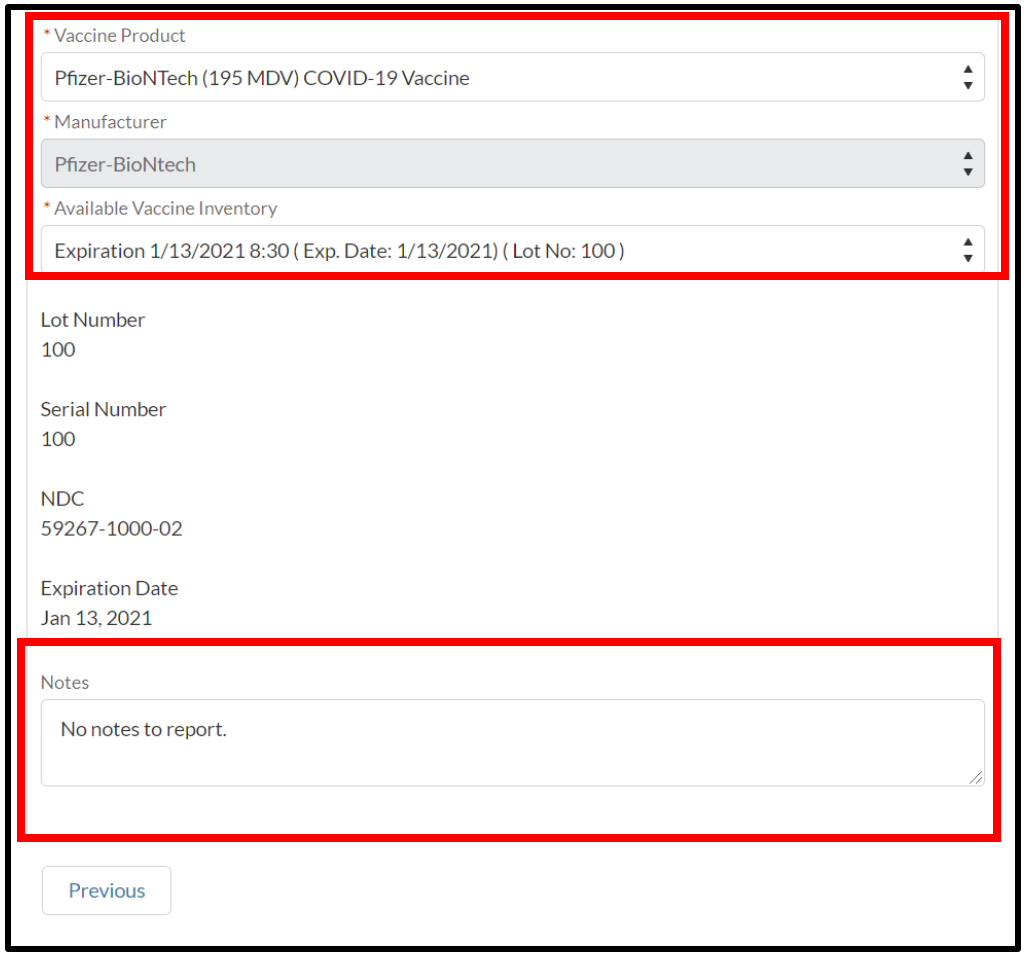
Statewide Location Manager

Tips

Use the drop-down for the **ON BEHALF OF (CLINICIAN)** field and type the first letter of the clinician's name.

If the individual completing the form is the person who administered the vaccine, **DO NOT ENTER** anything in the **ON BEHALF OF (CLINICIAN)** field.

Step 9 of 10: Enter Vaccine Administration Details



1. Continue populating all **REQUIRED** vaccination details
   - Vaccine Product (Vaccine Type)
   - Available Vaccine Inventory (what lot?)

Note: If you select a **SINGLE-DOSE** vaccine product, you must select **FIRST DOSE**, otherwise you will receive an error.

2. Enter any additional notes that are relevant in the **NOTES** text field

3. **REVIEW ALL VACCINE DETAILS**

4. Click **NEXT**

*If you are administering a second dose or additional dose of COVID-19 vaccine, please be sure to confirm the COVID-19 vaccine is from the **SAME MANUFACTURER** as the first COVID-19 vaccine dose.*

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

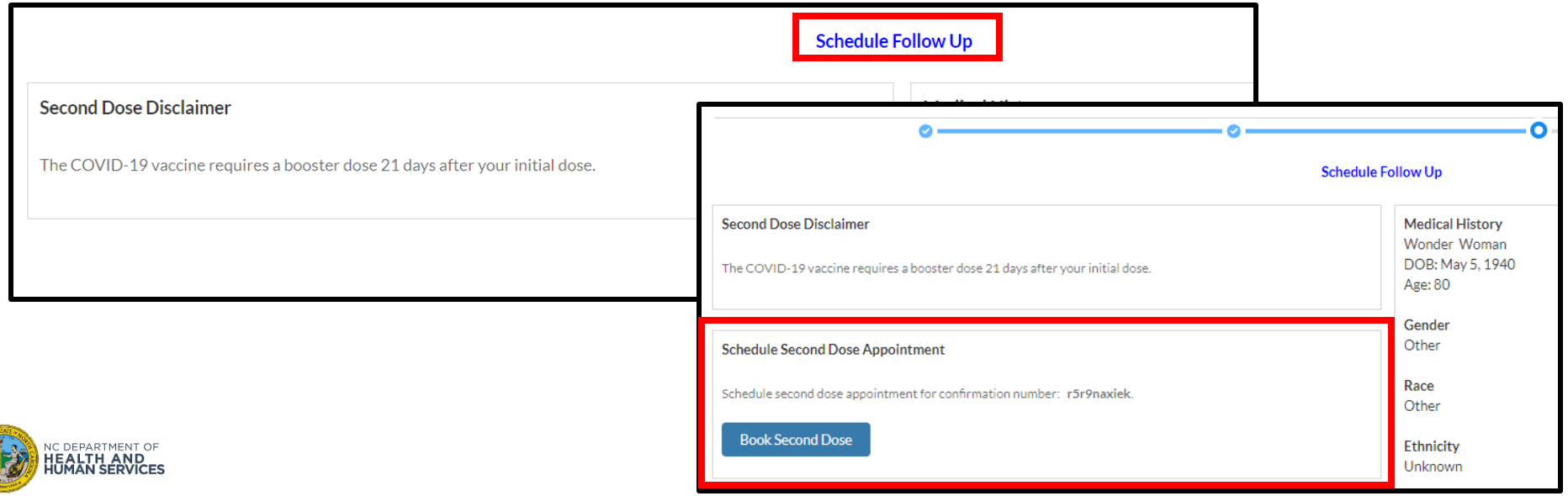
MANUFACTURER, LOT NUMBER, SERIAL NUMBER, NDC NUMBER and **EXPIRATION DATE** will **AUTO POPULATE** once you select the Product and Available Vaccine Inventory.

Step 10 of 10: Finish an Appointment

If you have administered a **SINGLE-DOSE** product of this is a second dose appointment, you will be routed back to the **HOME PAGE.**

If you have administered the first dose of a **TWO-DOSE** product, you will be routed to the **SCHEDULE FOLLOW-UP** page. This page will remind you to tell the recipient to schedule their second dose appointment. You can click **FINISH APPOINTMENT** to close the appointment and bring up the **HOME PAGE**.

*If the recipient used the scheduling feature in CVMS to book their first appointment, you will see a button labeled **BOOK SECOND DOSE** on this page. See the **SCHEDULE A SECOND DOSE APPOINTMENT** section for more details on that process.*



Audience

Healthcare Provider

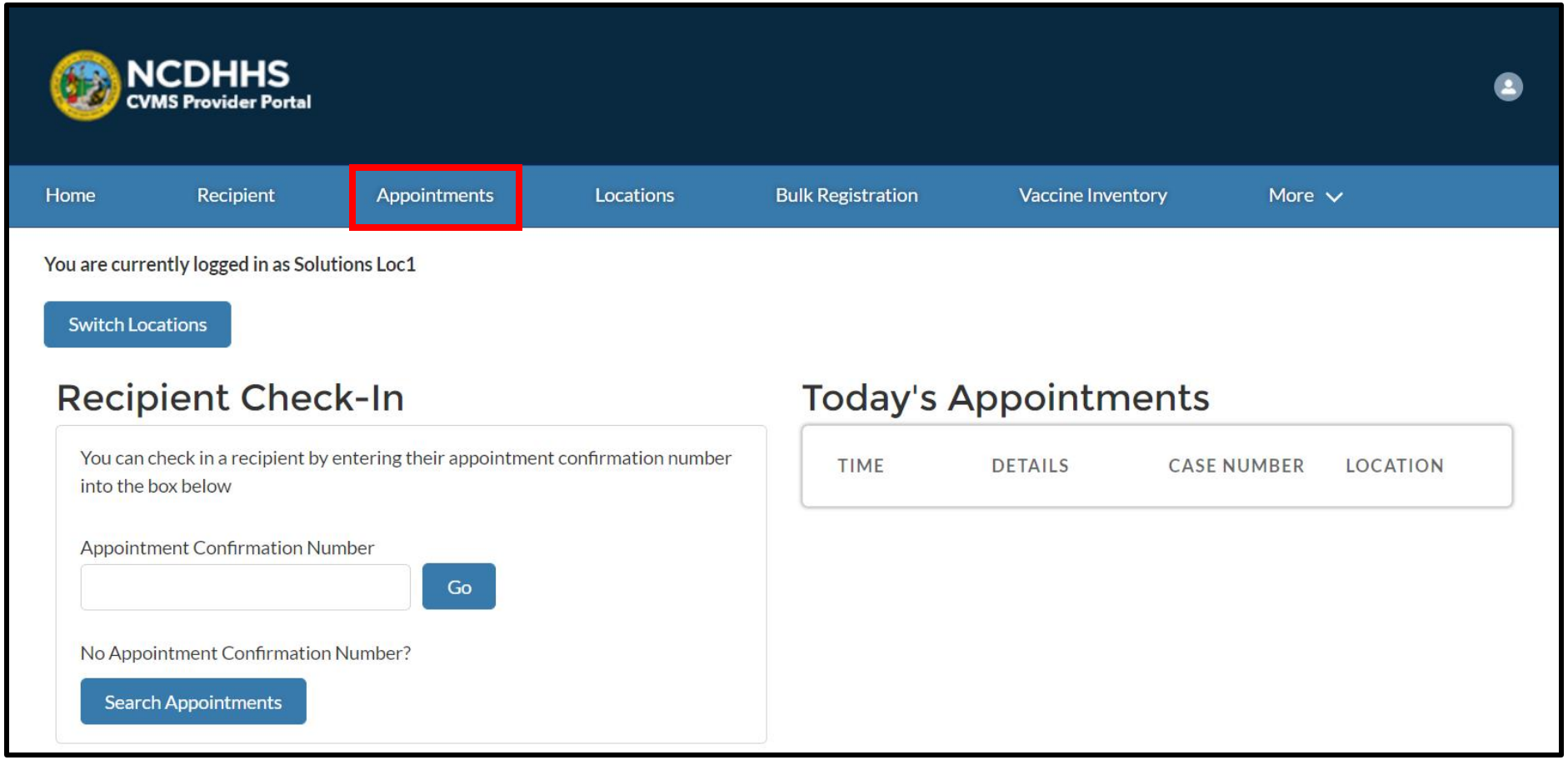
Healthcare Location Manager

Edit Vaccine Administration Details

Step 1 of 8: Navigate to Appointments Tab

If a **RECIPIENT** has incorrect details entered during Vaccine Administration, the Healthcare Provider must **EDIT** the details to ensure data accuracy.

To begin, navigate to the **APPOINTMENTS** tab.



Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

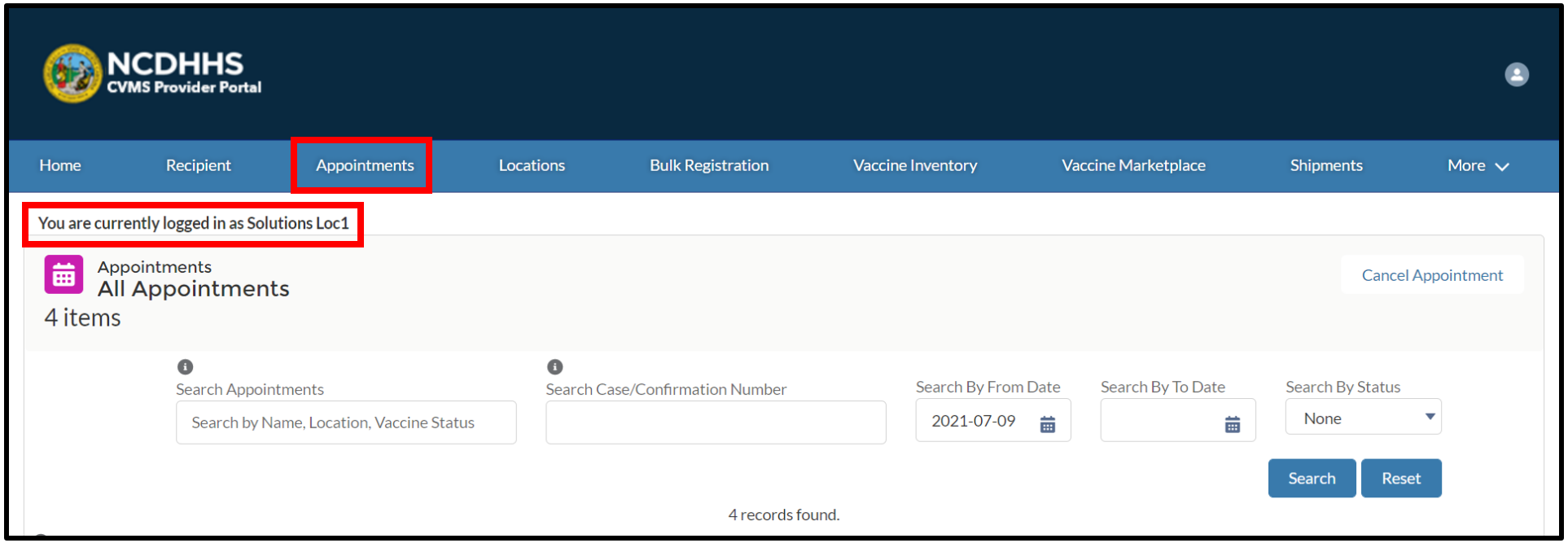
Tips

Healthcare Providers can only update Vaccine Administration details for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.

Step 2 of 8: Locate Recipient

Clicking on the Appointments tab takes you to a list view of all Appointments for your location.

Verify that you are currently logged in to the same location that the recipient received their vaccine.



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

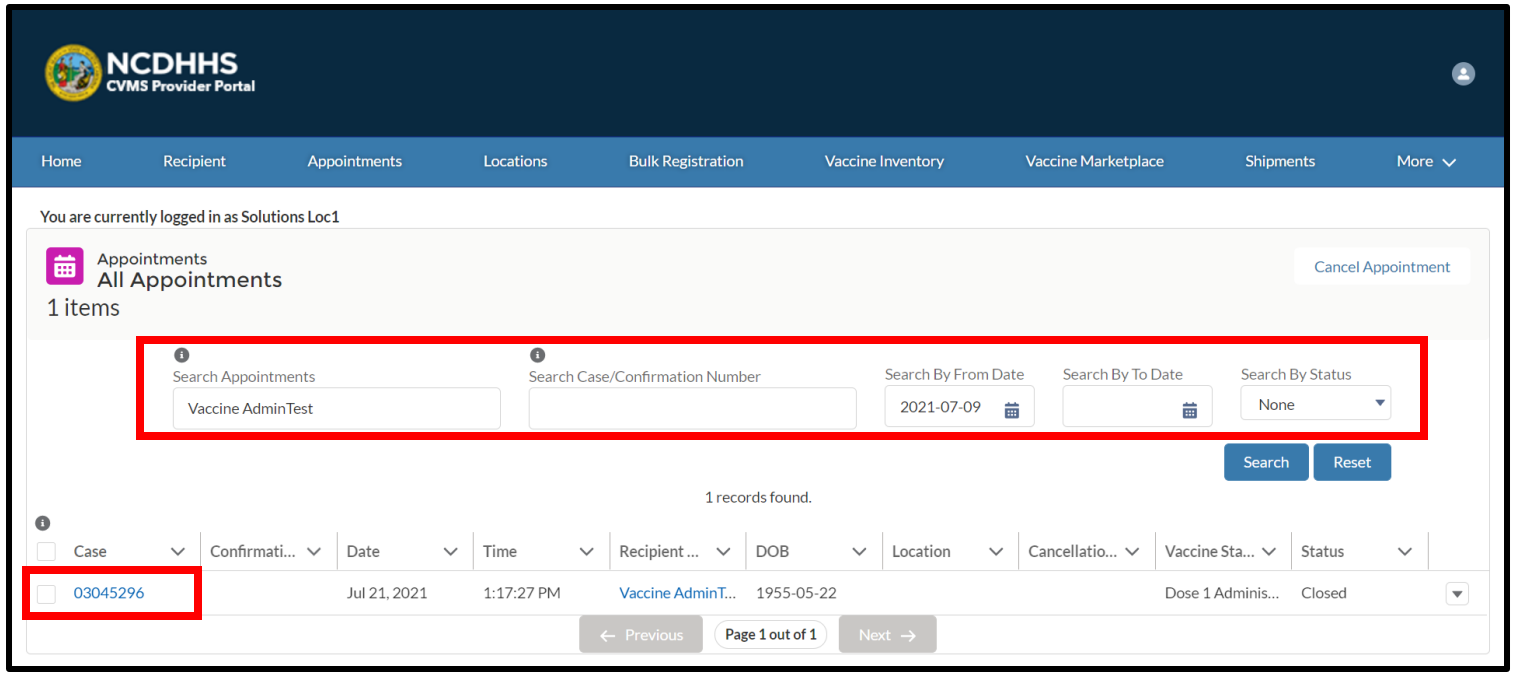
Tips

The **APPOINTMENTS** tab will default to show you appointments that were scheduled for the same day you are logged in.

Step 3 of 8: Select Appointment to be Updated

To begin editing the details of the **VACCINE ADMINISTRATION**, you must first locate the correct **APPOINTMENT RECORD**.

1. Enter the name of the recipient in the Search field, and adjust the date range to capture the date of the appointment that needs updating
2. Click **SEARCH**
3. Click the **CORRECT APPOINTMENT RECORD** for the recipient. The correct record will be the one that shows a **VACCINE STATUS** as either **DOSE 1 (or 2) ADMINISTERED or ADDITIONAL DOSE / BOOSTER ADMINISTERED**



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

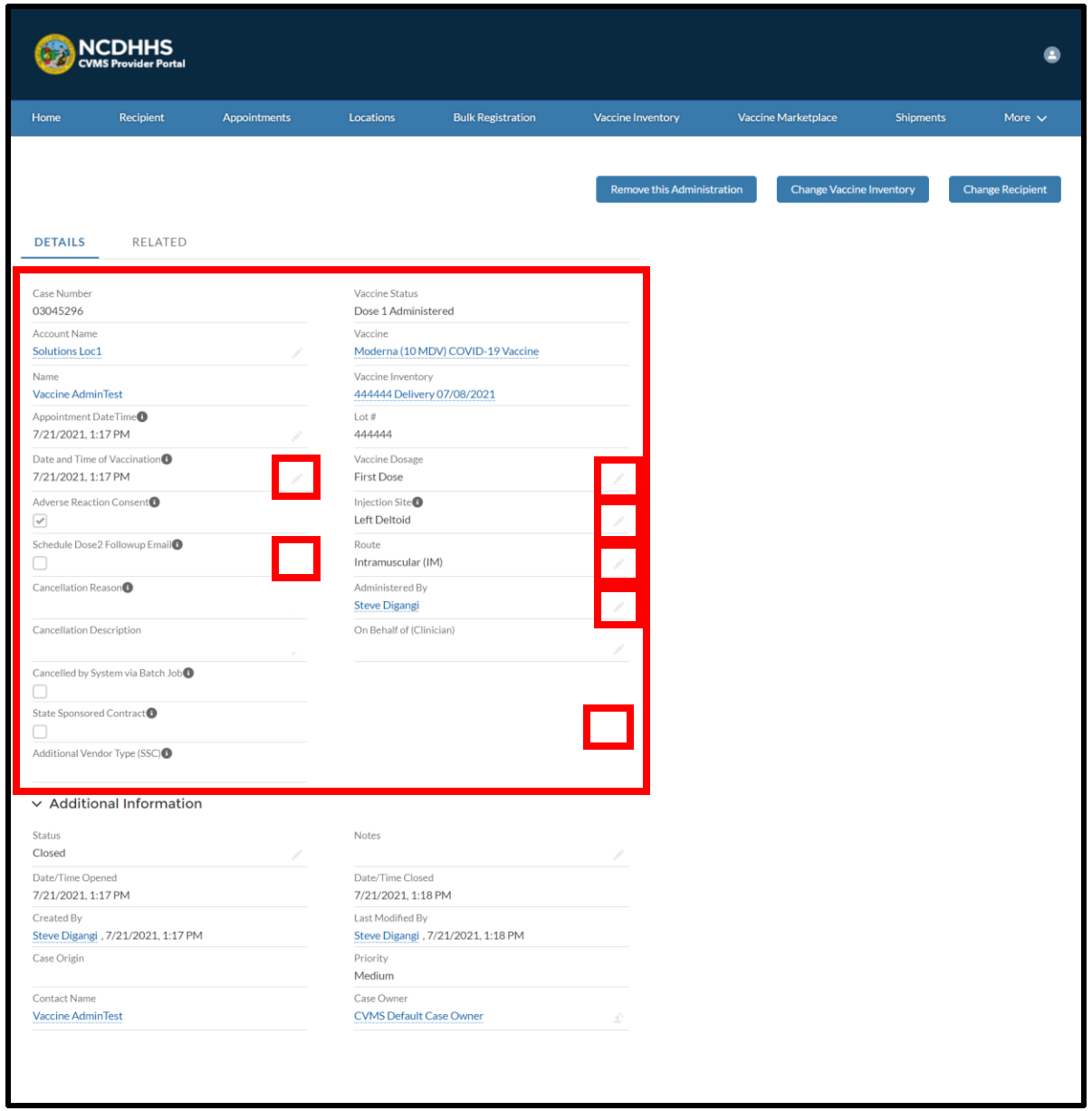
Alternatively, you may search for the recipient via the **RECIPIENT TAB**, locate their recipient record, and click on their Appointment record.

Step 4 of 8: Review Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will display for the recipient.

1. All Vaccination details are visible including:
   - Date and Time
   - Vaccine Product / Inventory
   - Injection Site
   - Route
   - Administered By
   - On Behalf of (Clinician)
   - Notes

2. To begin editing the details of the **VACCINE ADMINISTRATION**, select any **PENCIL ICON** to the right of a field



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

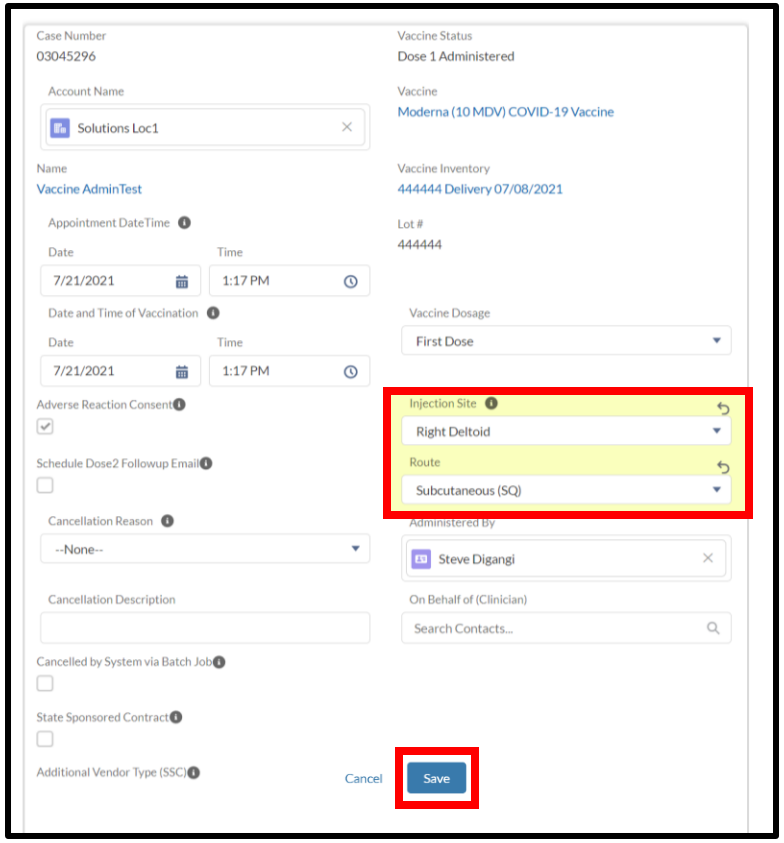
Step 5 of 8: Edit Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will now appear as editable fields. As you edit fields, they will highlight yellow to indicate that you've made a change.

1. Edit any of the following fields to the correct information:
   - Date / Time of Vaccination
   - Injection Site
   - Route
   - Administered By
   - On Behalf of (Clinician)
   - Notes

2. Do not edit any of the following fields:
   - Account Name
   - Cancellation Reason
   - Appointment Date / Time
   - Case Owner

3. Click **SAVE**



NOTE: You cannot remove Dosage, Injection Site, or Route, nor can you uncheck the Adverse Reaction Consent checkbox on administered appointments. If you need to remove a vaccine administration, see the Remove Vaccine Administration section of this user guide.

Audience

Healthcare Provider

Healthcare Location Manager

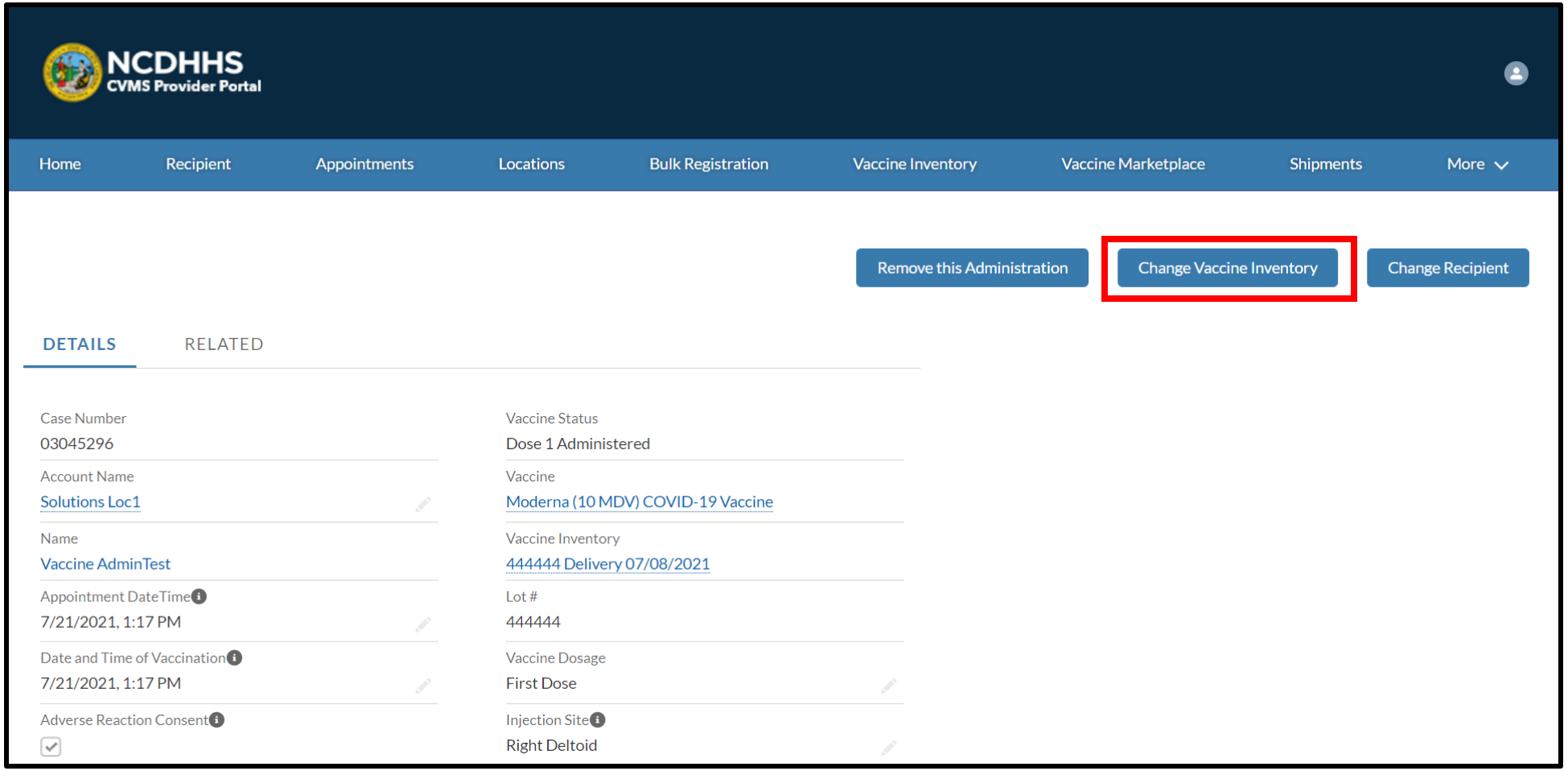
Statewide Location Manager

Tips

From this screen, you cannot edit the **VACCINE INVENTORY**. To see how to edit Vaccine Inventory, look at the next slide.

Step 6 of 8: Change Vaccine Inventory

To edit the **VACCINE INVENTORY** field of the **VACCINE ADMINISTRATION**, you must select the **CHANGE VACCINE INVENTORY** button.



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

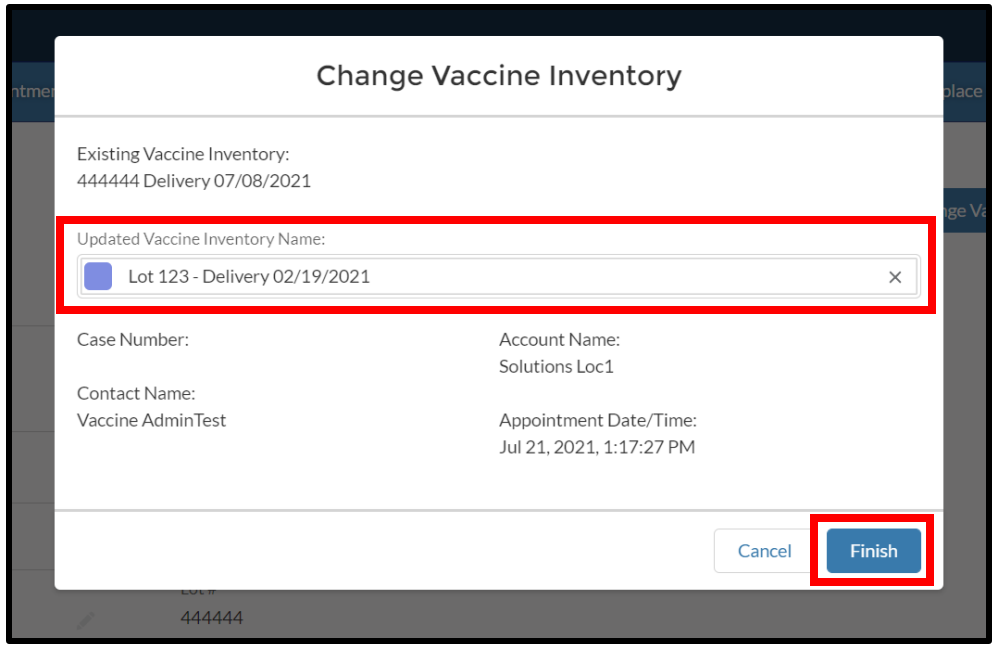
Review the next section of this User Guide for instructions on how to use the **CHANGE RECIPIENT** button.

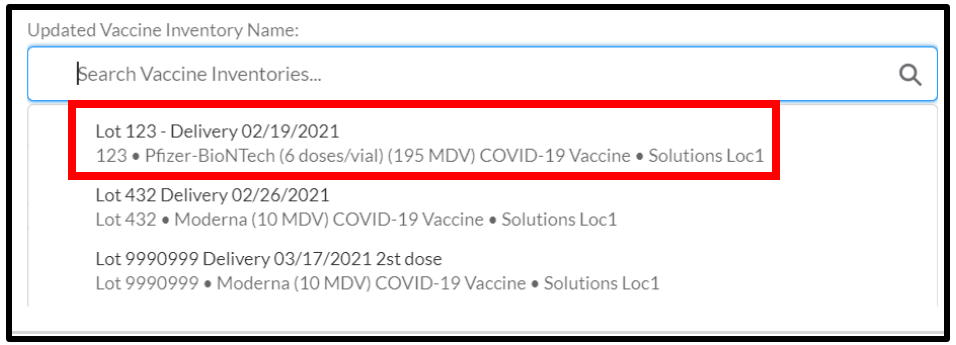
Step 7 of 8: Select an Updated Vaccine Inventory

A pop-up window will appear inviting you to Change Vaccine Inventory.

1. Click the **SEARCH VACCINE INVENTORIES** field, which will populate a list of available inventories for your location
2. Locate and click the correct inventory, or type the name of the inventory to quickly find it

   Note: You cannot change the Vaccine Inventory from a two-dose vaccine product to a single-dose vaccine product if you are editing a **SECOND DOSE** vaccine administration
3. Click **FINISH**





Audience

Healthcare Provider

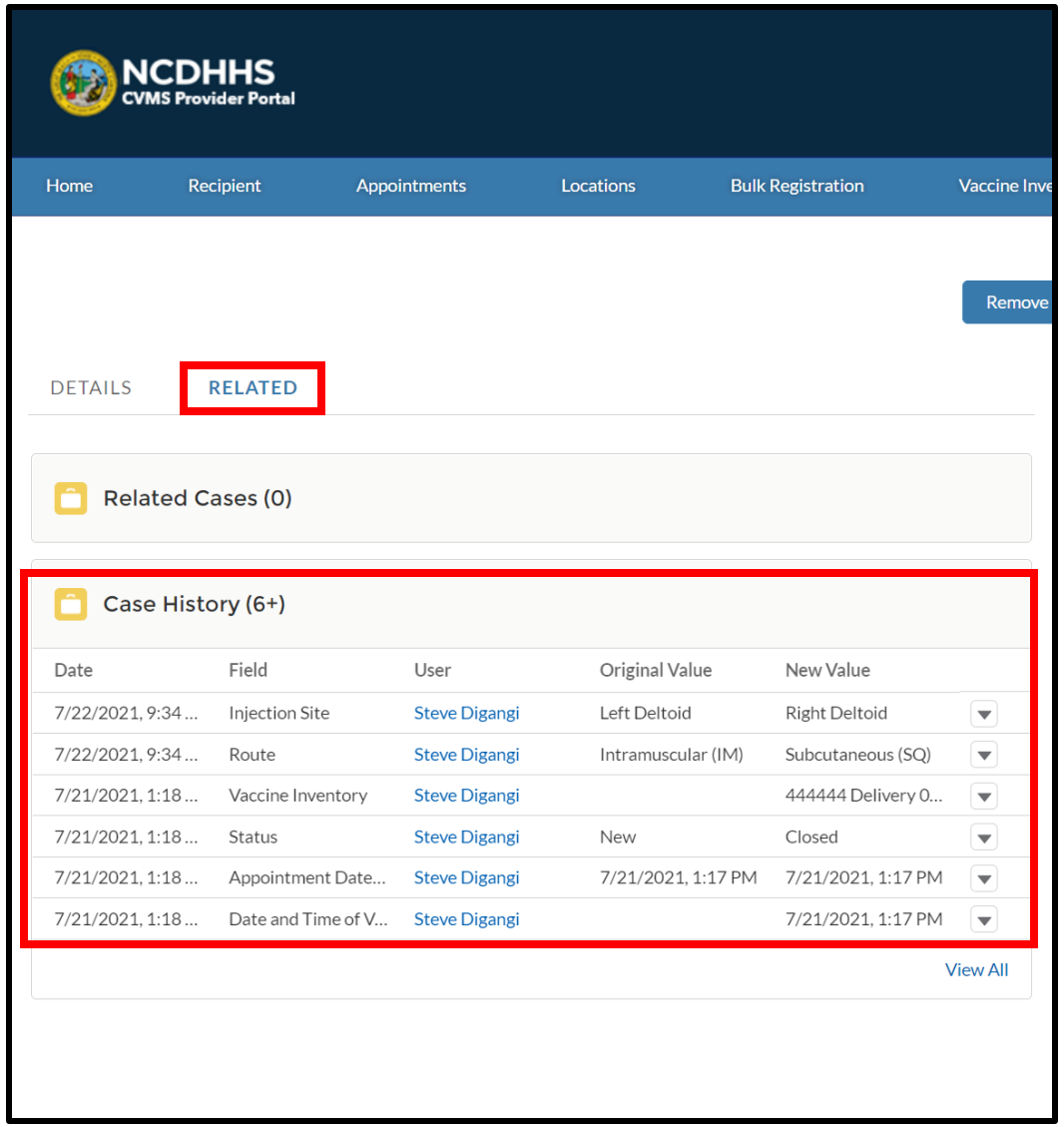
Healthcare Location Manager

Statewide Location Manager

Tips

Although **VACCINE PRODUCT** is not an editable field, changing the **VACCINE INVENTORY** to an inventory of a different product will automatically update the **VACCINE PRODUCT** field.

Step 8 of 8: Review the Vaccine Administration Details Change History



At any point, you can review the history of changes made to the Vaccine Administration details.

1. From the Appointment Record, click the **RELATED** tab
2. View **CASE HISTORY** to see the date, time, user, old value, and new value for each individual field that was changed

Audience

- **Healthcare Provider**
- **Healthcare Location Manager**
- **Statewide Location Manager**

Post-Vaccine Administration Reminders

Post Vaccine Administration Reminders

After recipients received a first dose, they will receive **TWO (2) SECOND DOSAGE REMINDER NOTIFICATIONS** of the timing requirements for the second dosage:

1. The first reminder is **24 HOURS** after
2. The second is **ONE WEEK AFTER** the first dosage is administered.

They also will receive a **NOTIFICATION** informing them of their **PROOF OF VACCINATION**. This will be automatically generated for them.

NOTE*:* COVID-19 vaccination record cards should be provided to the recipient or their guardian after the recipient receives their COVID-19 vaccine.

The recipient can request you provide a completed vaccination record card with important information about the COVID-19 vaccine they received (e.g., vaccine manufacturer, lot number, date of first dose administration, and second dose due date).

You can also suggest that they take a picture of their vaccination record so they can remember the type of vaccine they received and their second dose due date.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

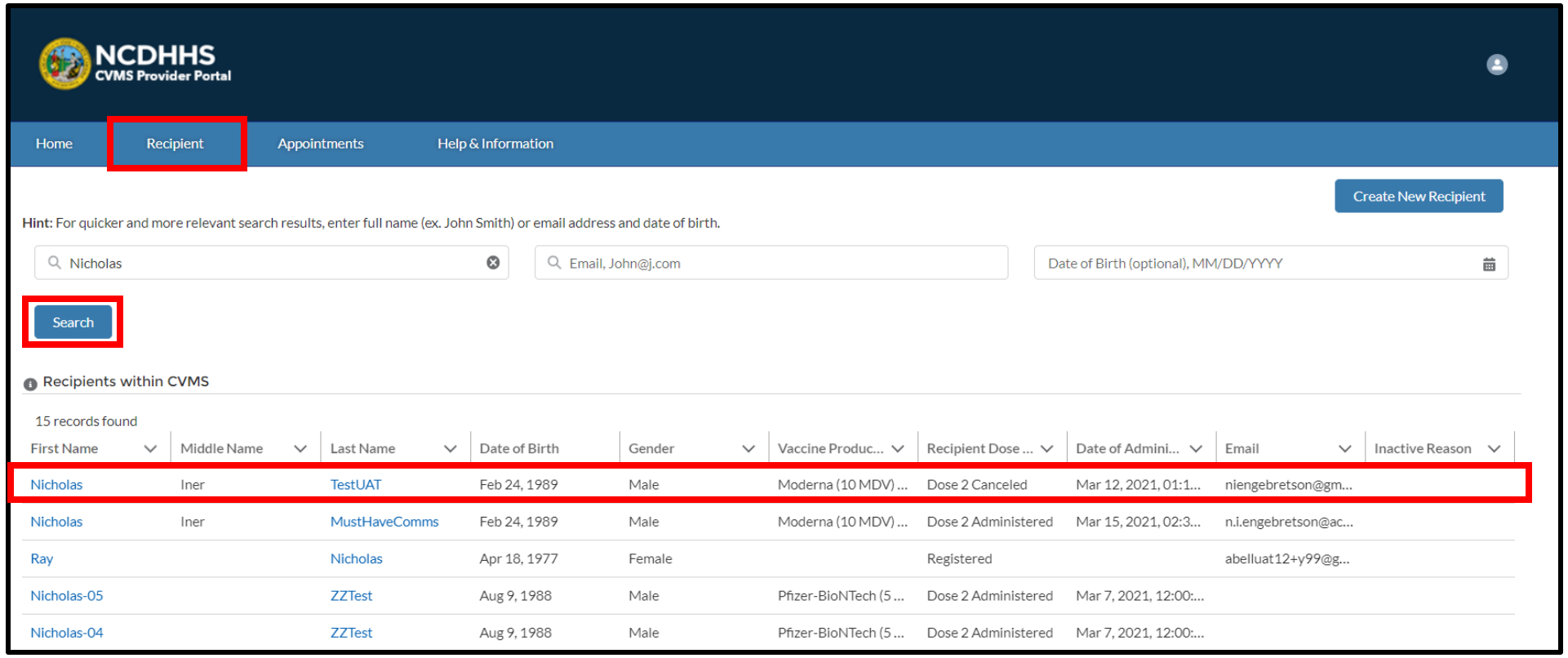
Tips

Recipients who receive a **SINGLE-DOSE** product will not receive any second-dose notifications.

Generating the Vaccination Information PDF for a Recipient

Step 1 of 2: Search for the Recipient

1. Click the **RECIPIENT TAB**
2. Type your **RECIPIENT'S NAME** in the **SEARCH BAR** and **PRESS ENTER**
3. Click your **RECIPIENT'S NAME** from the list to open the recipient's account



Audience

Healthcare Provider

Healthcare Location Manager

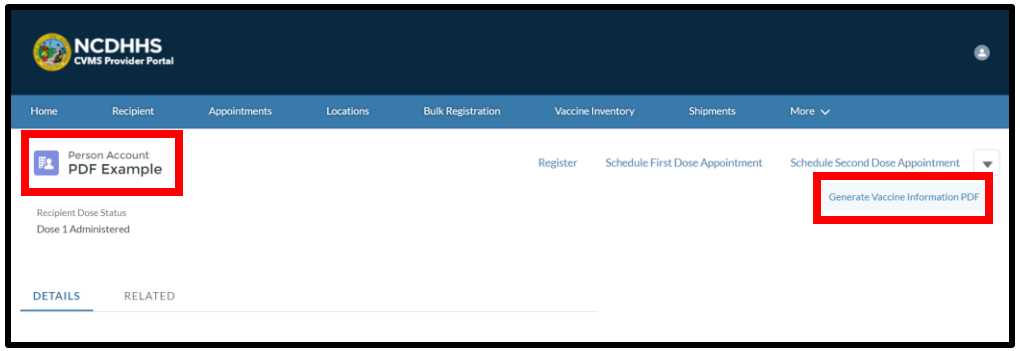
Statewide Location Manager

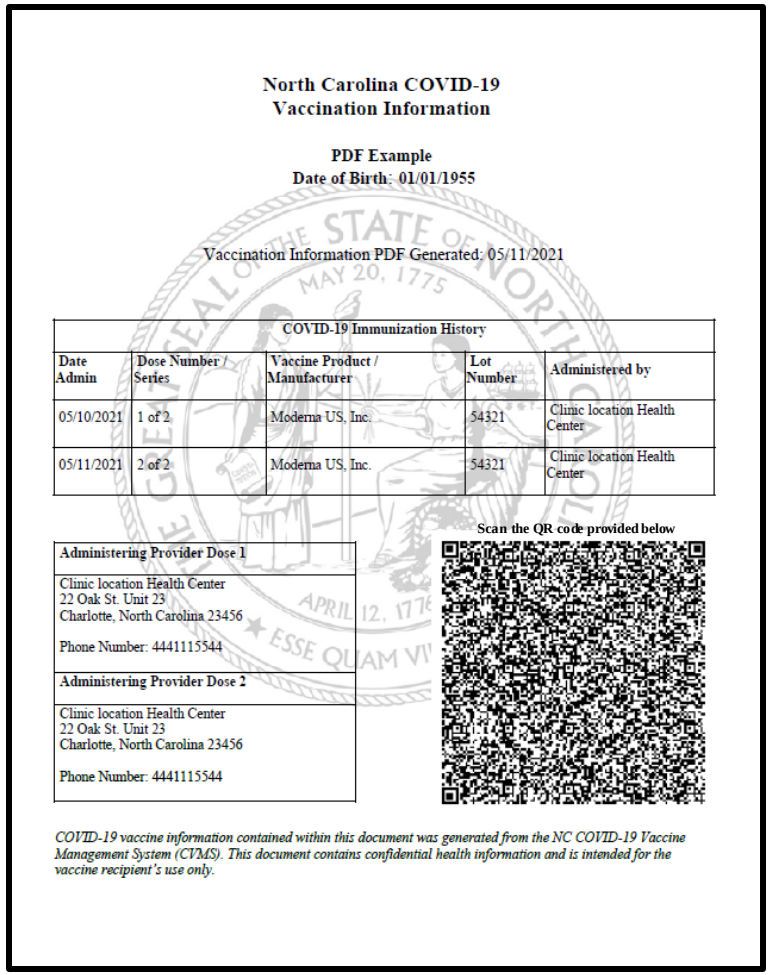
Step 2 of 2: Generate Vaccine Information PDF

You may now generate a PDF document of a recipient's vaccination information that can be downloaded or printed. This PDF document can be generated for any recipient in CVMS.

1. Select the **GENERATE VACCINE INFORMATION PDF** button
2. Print or securely send the document to the recipient

NOTE: If a recipient has received no vaccinations and you click the **GENERATE VACCINE INFORMATION PDF** button, there will be an error. If a recipient has received more than 2 doses, information for all doses will appear on the PDF document.





North Carolina COVID-19
Vaccination Information

PDF Example
Date of Birth: 01/01/1955

Vaccination Information PDF Generated: 05/11/2021

COVID-19 Immunization History				
Date Admin	Dose Number / Series	Vaccine Product / Manufacturer	Lot Number	Administered by
05/10/2021	1 of 2	Moderna US, Inc.	54321	Clinic location Health Center
05/11/2021	2 of 2	Moderna US, Inc.	54321	Clinic location Health Center

Administering Provider Dose 1
Clinic location Health Center 22 Oak St. Unit 23 Charlotte, North Carolina 23456 Phone Number: 4441115544
Administering Provider Dose 2
Clinic location Health Center 22 Oak St. Unit 23 Charlotte, North Carolina 23456 Phone Number: 4441115544

Scan the QR code provided below

COVID-19 vaccine information contained within this document was generated from the NC COVID-19 Vaccine Management System (CVMS). This document contains confidential health information and is intended for the vaccine recipient's use only.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

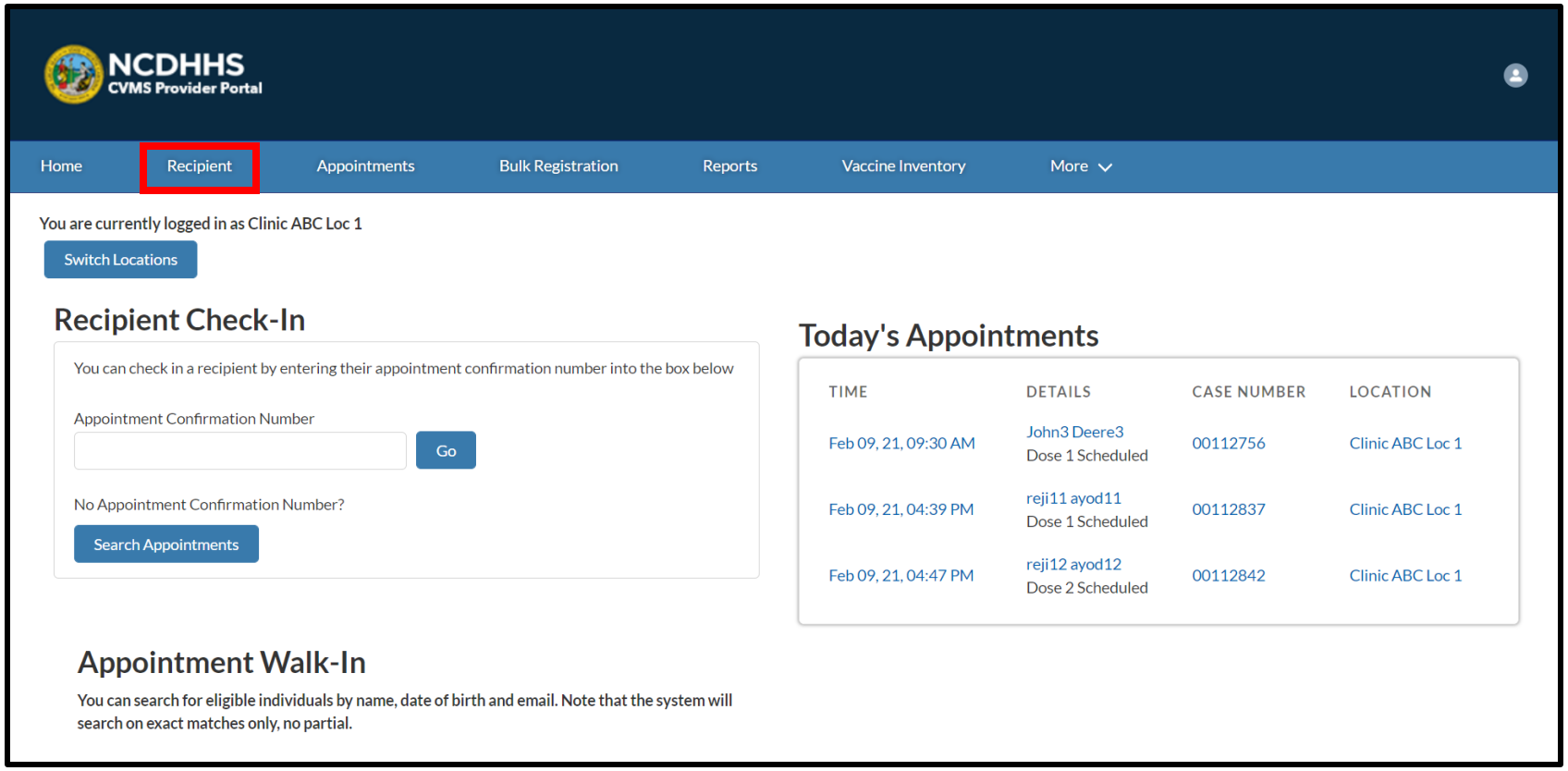
To print the Vaccination Information PDF document in Spanish, the recipient will have to log into the COVID-19 Vaccine Portal, set the language to Spanish, and then generate the PDF document for themselves. The PDF document cannot be generated in Spanish from the CVMS Provider Portal.

Other Operations Available to Edit a Recipient or an Administration Record Post-Vaccination

Edit a Recipient Registration Record Details

Step 1 of 4: Navigate to the CVMS Provider Portal Recipient Tab

In some instances, a recipient may need their information on the COVID-19 Vaccine Registration form edited. To do so, navigate to the Recipient Tab.



Audience

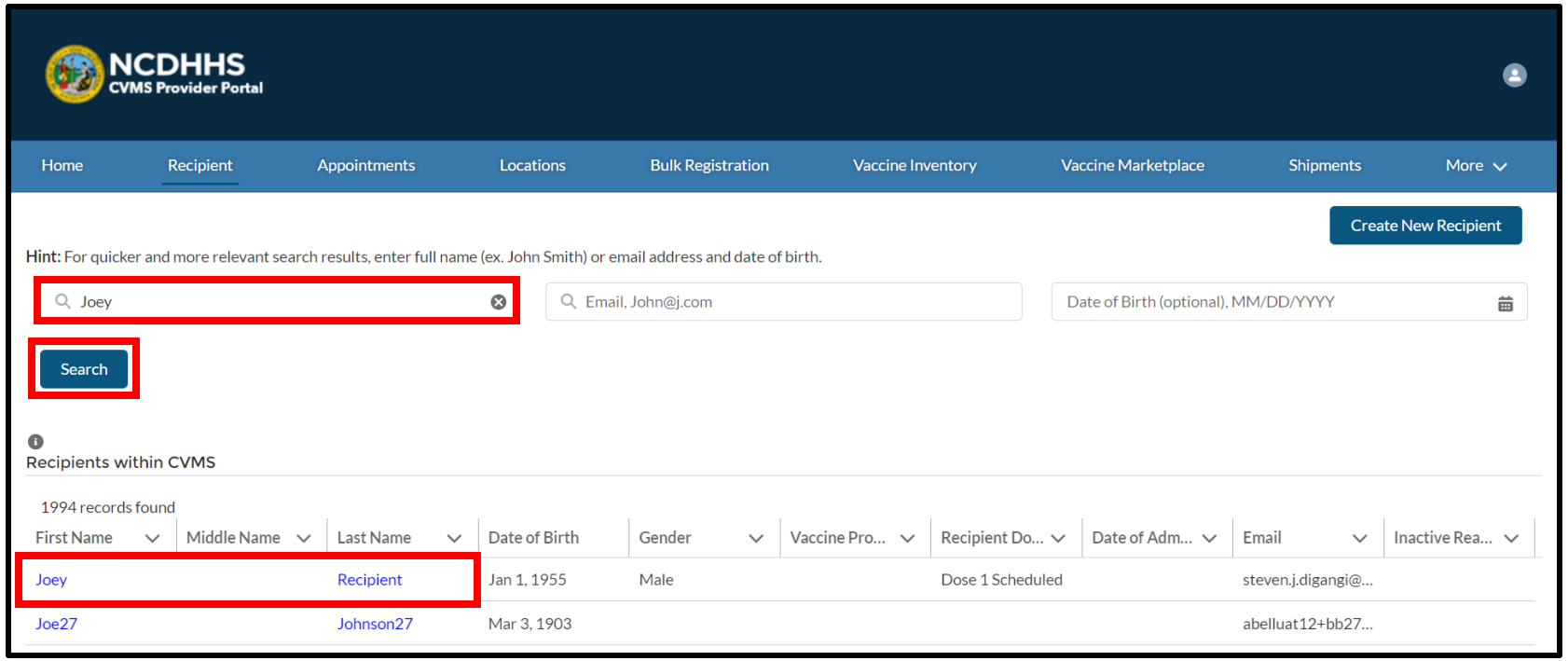
- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 2 of 4: Search for the Recipient

1. Enter the recipient's **NAME** (first name and last name) in the search bar for the recipient who needs their COVID-19 Vaccine Registration form updated
2. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself

3. Click **SEARCH**
4. Click on the desired recipient from your search results



Audience

Healthcare Provider

Healthcare Location Manager

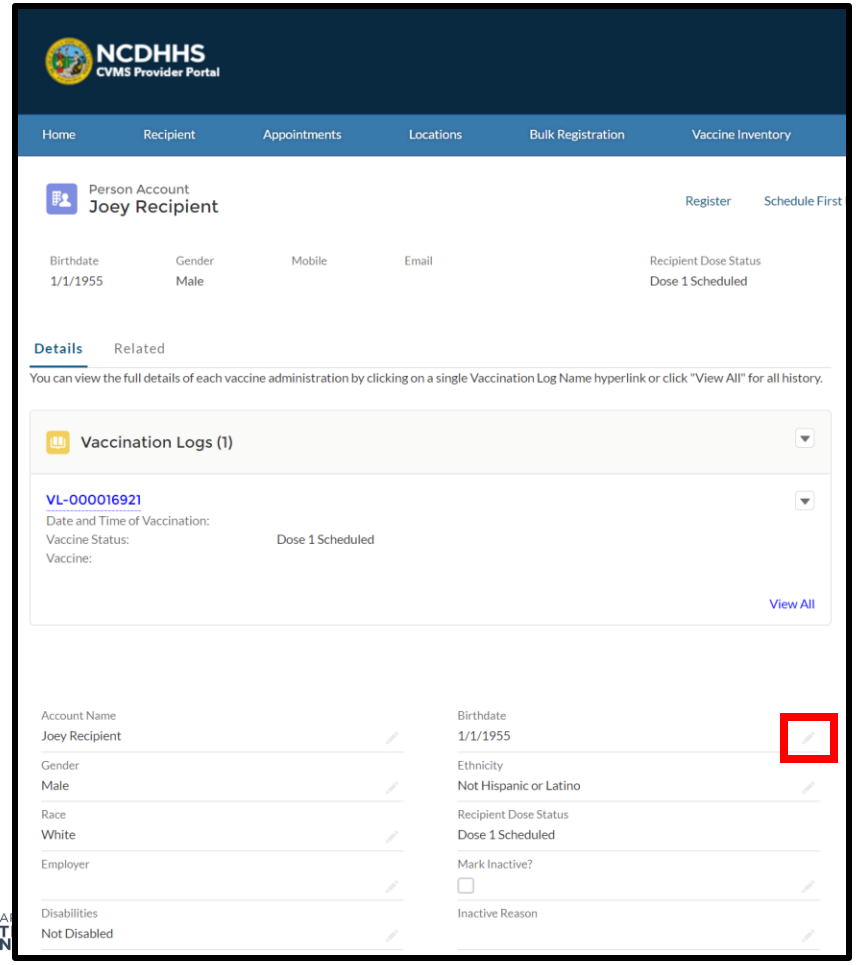
Statewide Location Manager

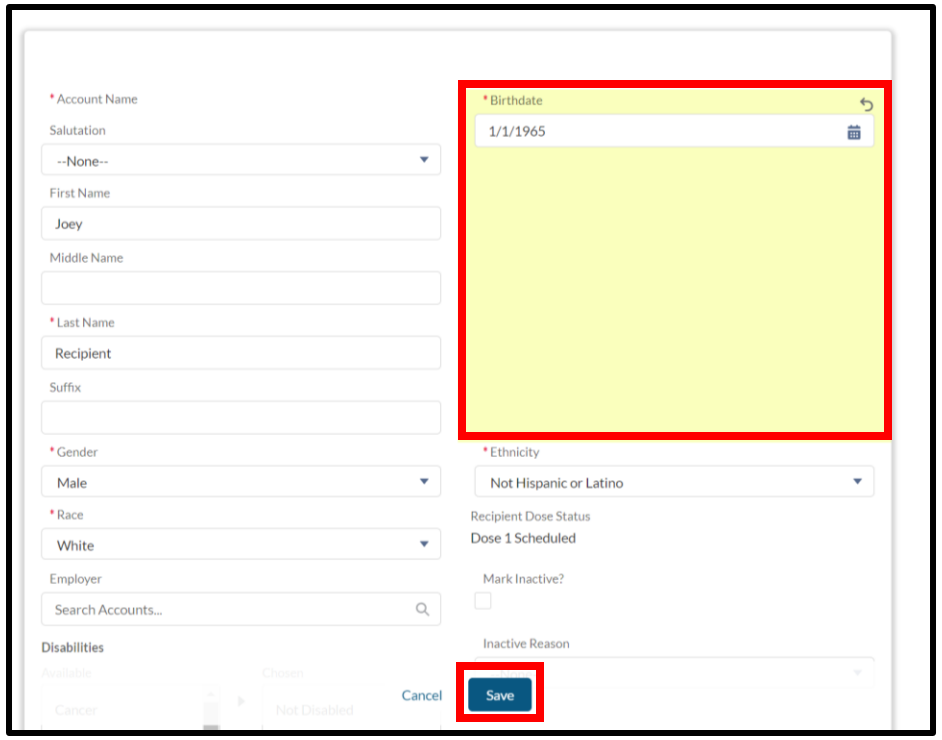
Tips

Only select a recipient record that populates in the **RECIPIENTS WITHIN CVMS** section of your search results

Step 3 of 4: Edit the Recipient's Information

1. From the recipient's Person Account, click the pencil icon next to the field you need to edit
2. Make any necessary changes (fields where you've made an unsaved change will be highlighted in **YELLOW**)
3. Click **SAVE**





Audience

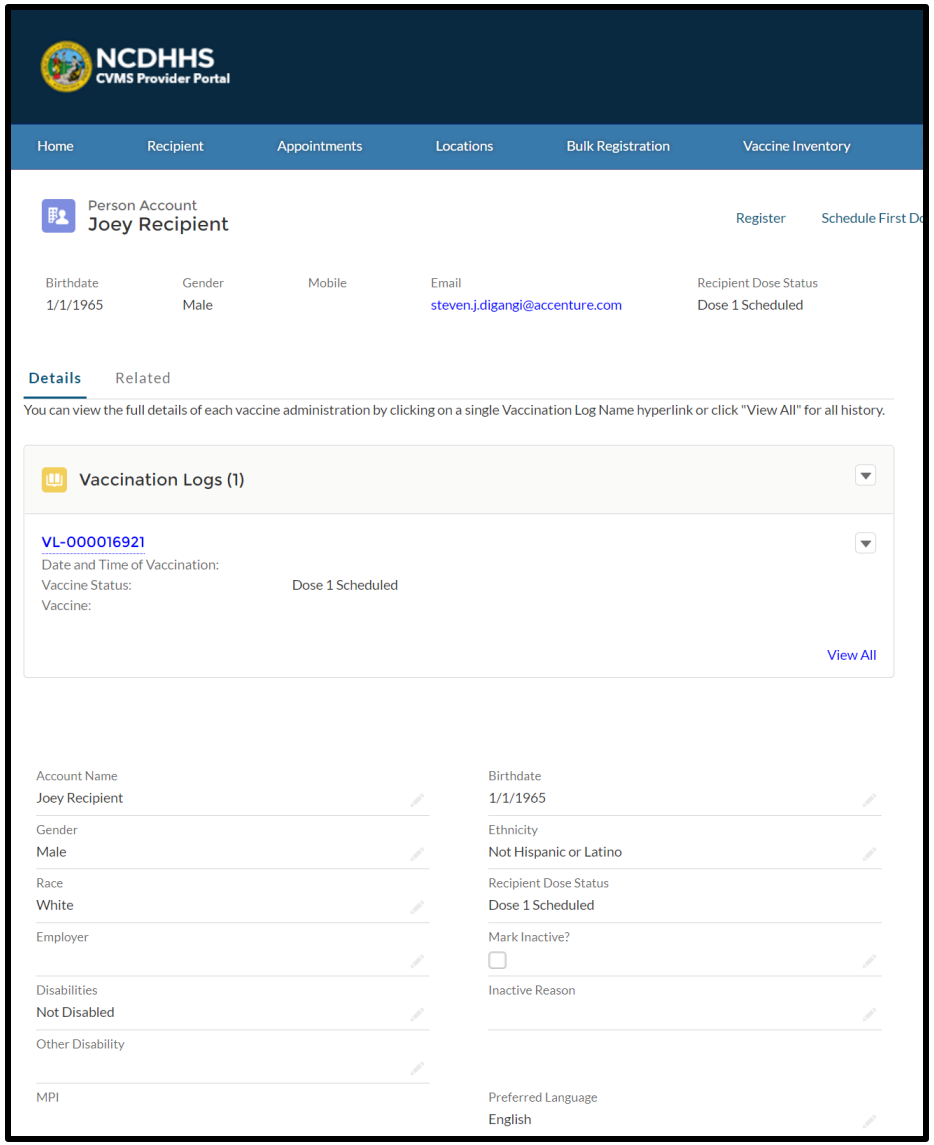
- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

If you make an update that you did not mean to make, you can select the **UNDO** arrow to revert to the original value or click **CANCEL.**

The Vaccination Log at the top of the page cannot be edited. It is a summary of the doses administered to the recipient. See the **EDIT VACCINE ADMINISTRATION DETAILS** section of this user guide for more information.

Step 4 of 4: Confirm Updates



The updated information will now show as part of the recipient's record.

Review the information that you entered to ensure it is correct.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

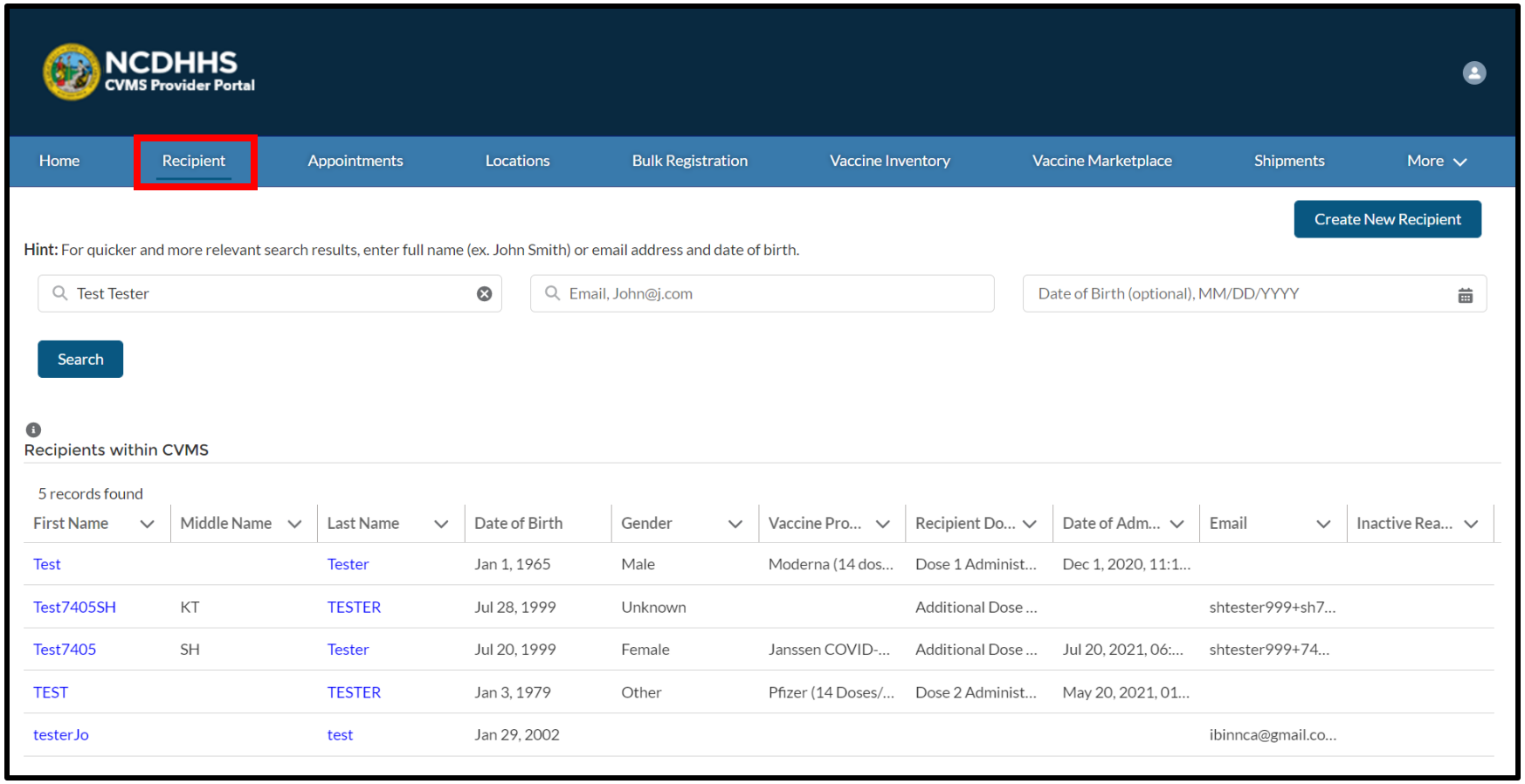
Any changes you make to a recipient's record will also be reflected when the recipient logs in to the COVID-19 Vaccine Portal.

Change the Recipient of a Vaccine Administration

Step 1 of 5: Navigate to Recipient Tab

When a **HEALTHCARE PROVIDER** enters Vaccine Administration details for the wrong **RECIPIENT**, the Healthcare Provider must change the recipient for the entered Vaccine Administration details.

To begin, navigate to the **RECIPIENT** tab.



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

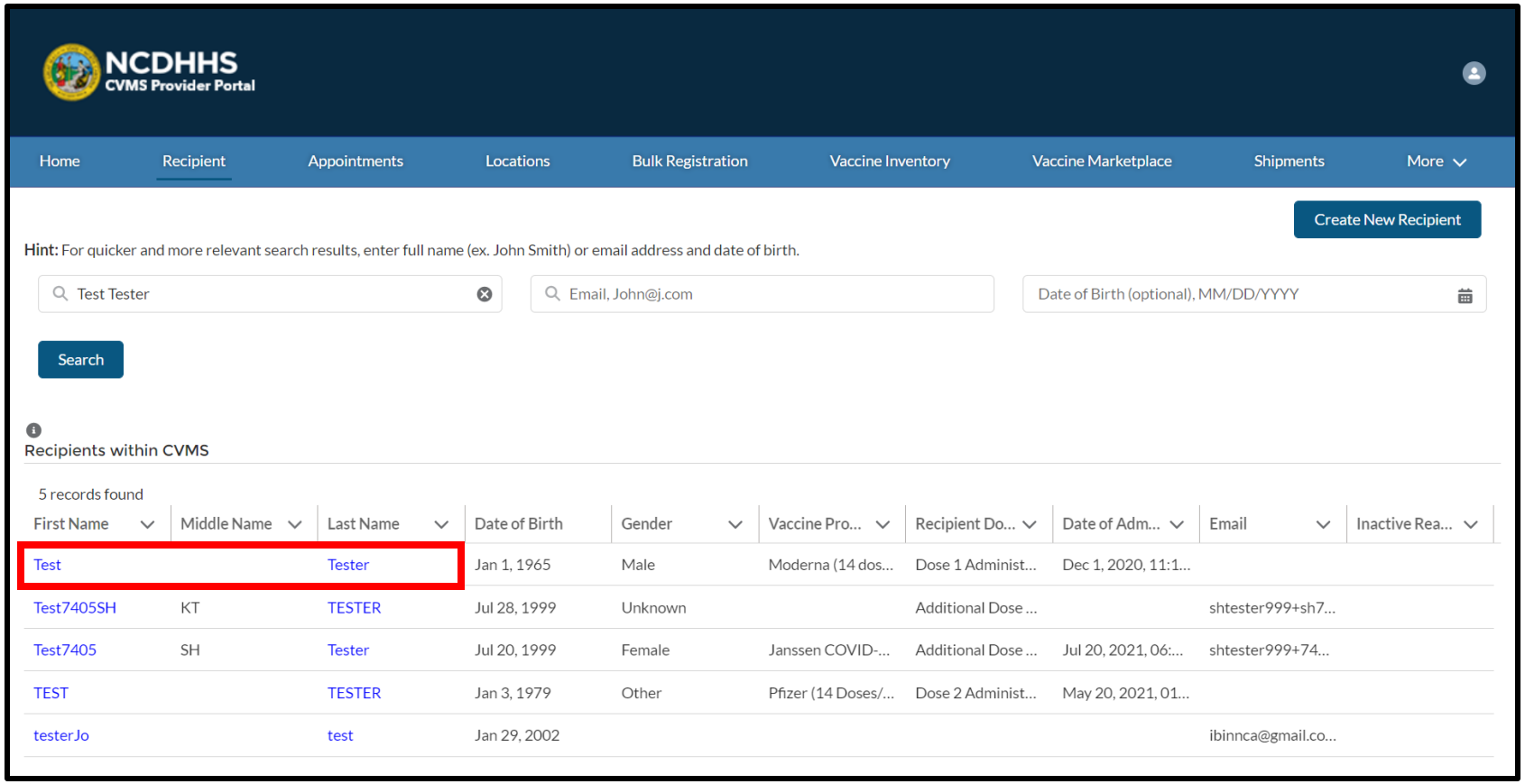
Tips

Healthcare Providers can only change Vaccine Administration recipient for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.

Step 2 of 5: Locate Recipient

Clicking on the **RECIPIENT TAB** takes you to a screen to search all recipients in CVMS.

1. Type in the incorrect recipient's name in the search box
2. Click **SEARCH**
3. Select the recipient's name



Audience

Healthcare Provider

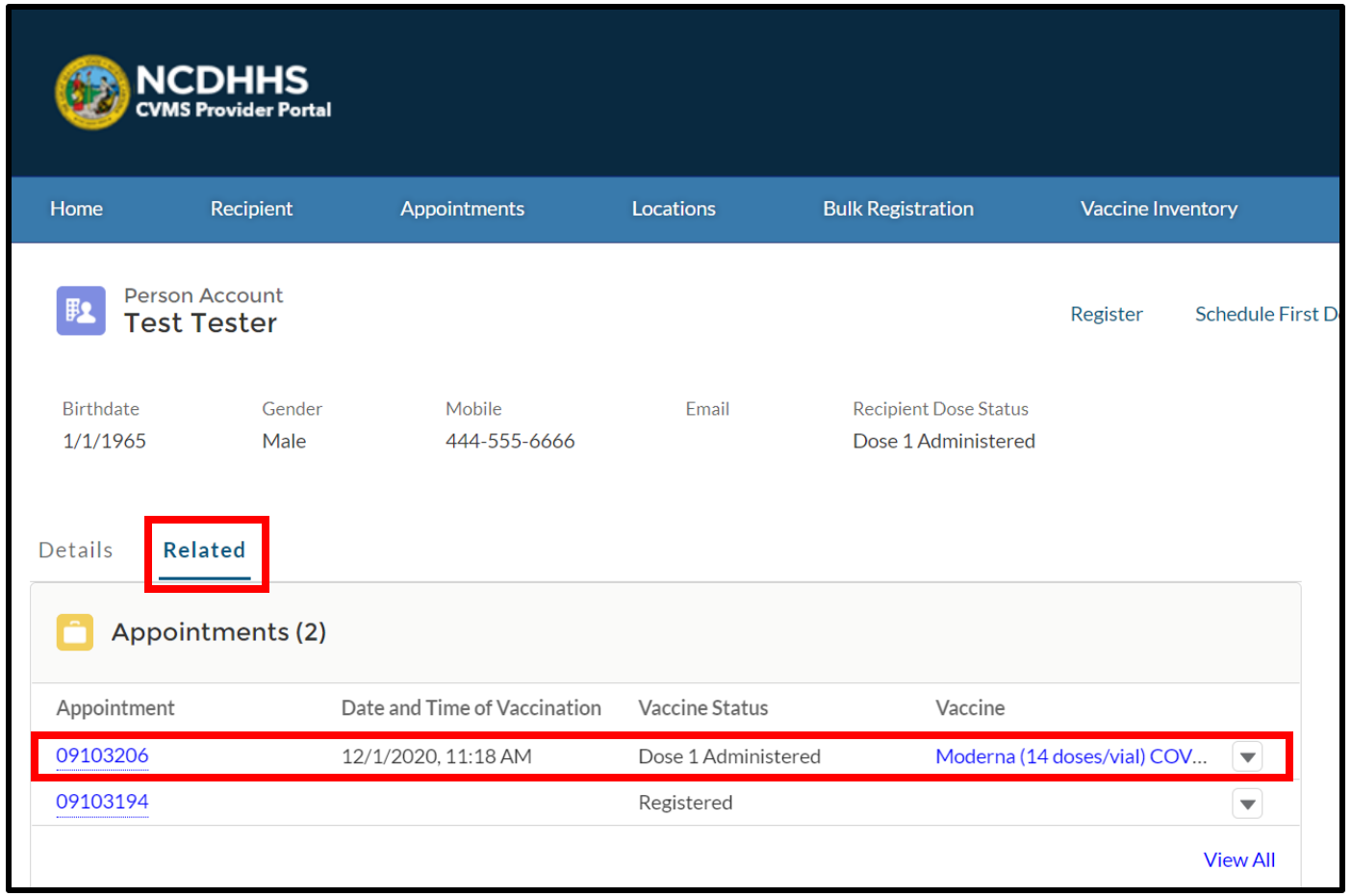
Healthcare Location Manager

Statewide Location Manager

Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

1. Click on the **RELATED** tab under the recipient's name to view appointment information
2. Select the appointment record that needs to be changed to another recipient (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED, DOSE 2 ADMINISTERED, or ADDITIONAL DOSE / BOOSTER ADMINISTERED**)



Audience

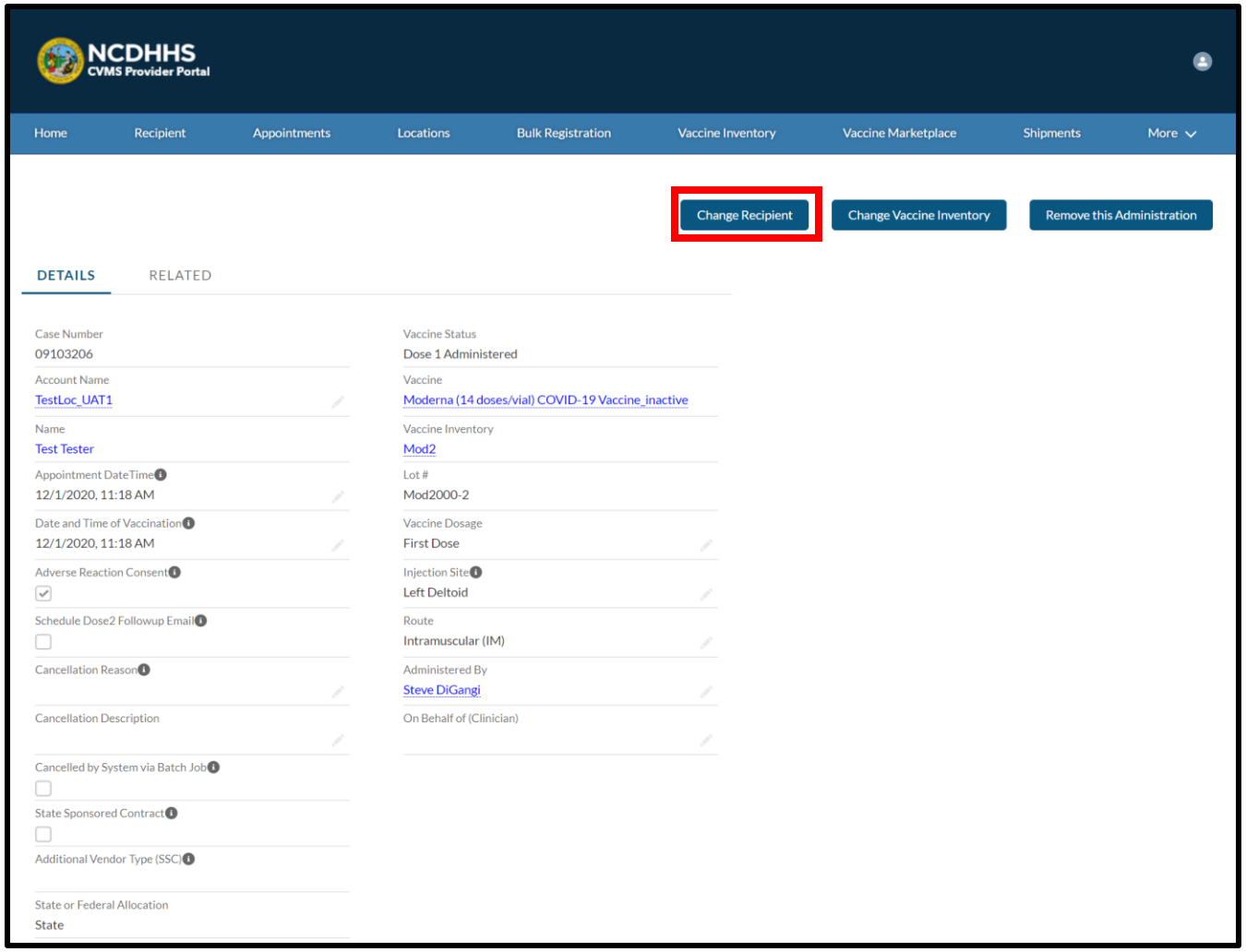
- **Healthcare Provider**
- **Healthcare Location Manager**
- **Statewide Location Manager**

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 4 of 5: Change Recipient

Selecting the appointment record takes you to the appointment details screen.

Click **CHANGE RECIPIENT** in the top right corner to transfer the **VACCINE ADMINISTRATION** details to the correct recipient.



Audience

Healthcare Provider

Healthcare Location Manager

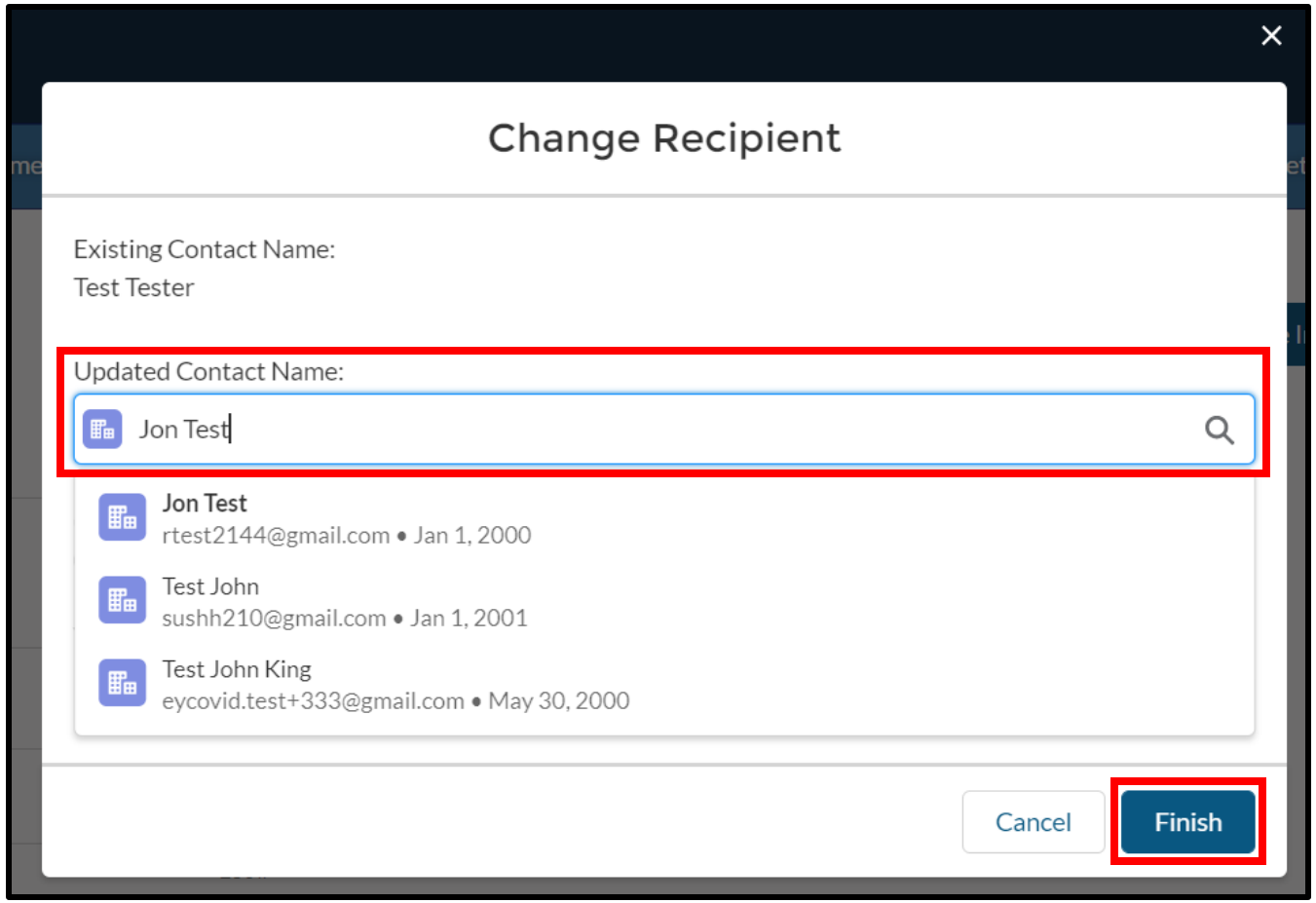
Statewide Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 5 of 5: Locate Correct Recipient

A Change Recipient pop-up box will appear.

1. Search for the correct recipient in the **UPDATED CONTACT NAME** field and click their name
2. Click **FINISH**
3. A Success Confirmation pop-up should appear at the top of the screen



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

The status of the incorrect recipient will be reverted to their previous status, (e.g., 'Dose 1 Administered' will revert to 'Registered').

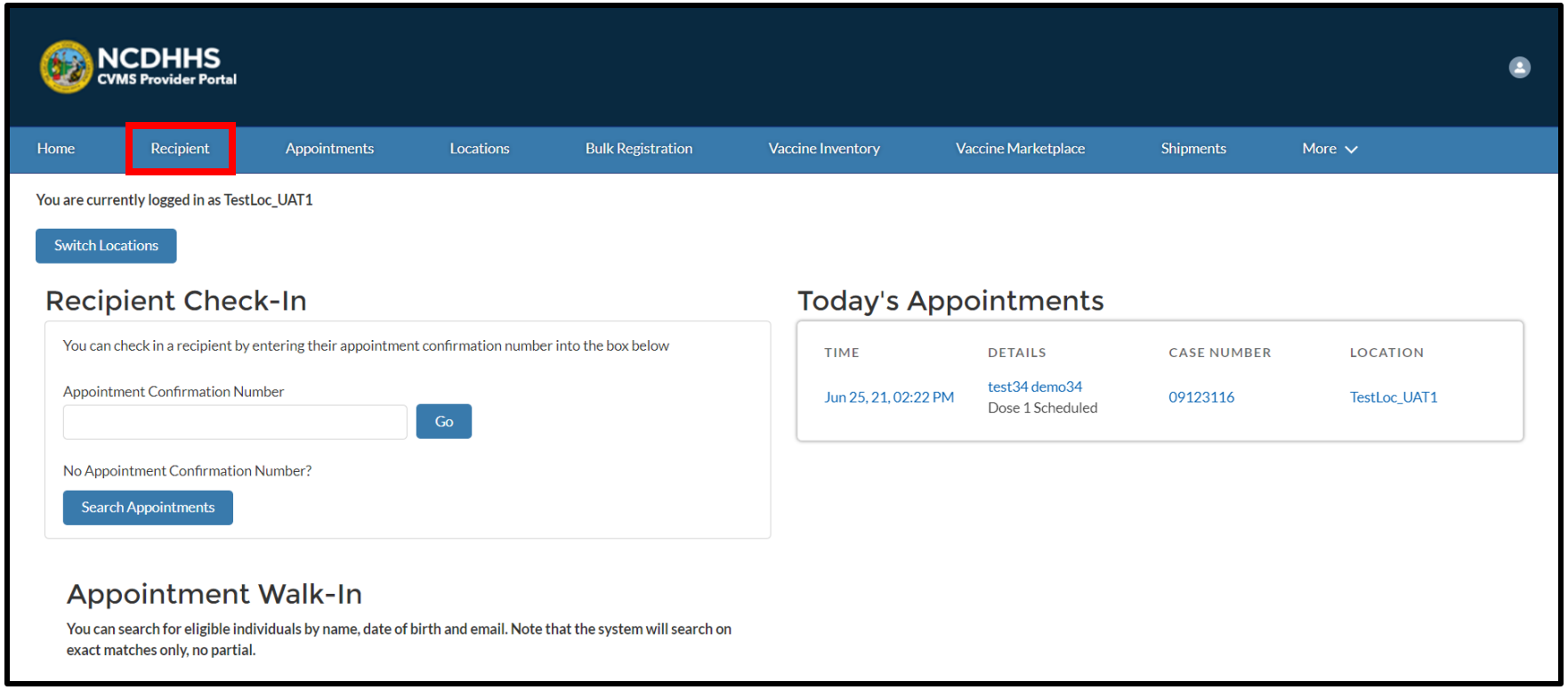
The correct recipient's status will be updated to reflect the administered vaccine (e.g., updated from 'Registered' to 'Dose 1 Administered').

Remove Vaccine Administration

Step 1 of 5: Navigate to Recipient Tab

When a **HEALTHCARE PROVIDER** enters Vaccine Administration details erroneously and the Vaccine Administration needs to be completely cleared from CVMS, the Healthcare Provider must **REMOVE** the Vaccine Administration details.

To begin, navigate to the **RECIPIENT** tab.



Audience

Healthcare Location Manager

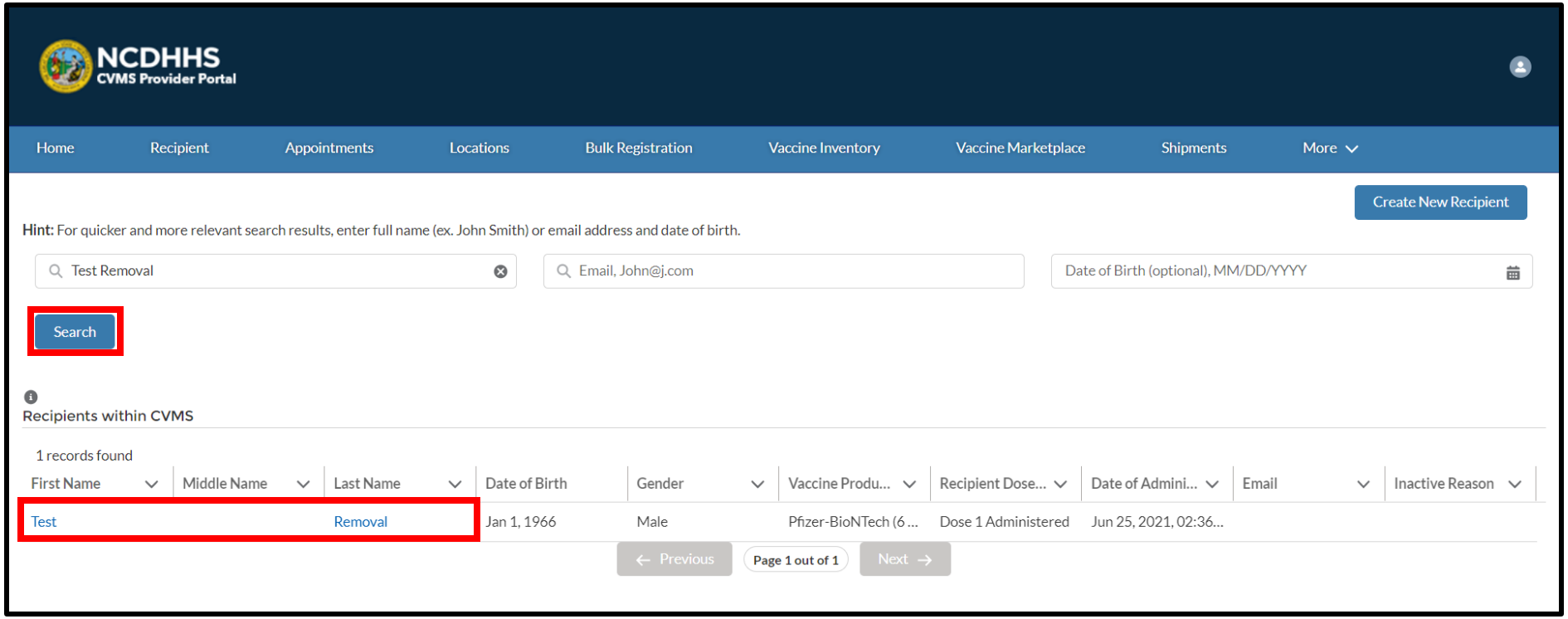
Tips

Healthcare Location Managers can only remove Vaccine Administration for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.

Step 2 of 5: Locate Recipient

Clicking on the **RECIPIENT TAB** takes you to a screen to search all recipients in CVMS.

1. Type in the name of the recipient that has the incorrect vaccination administration in the search box
2. Click **SEARCH**
3. Select the recipient's name



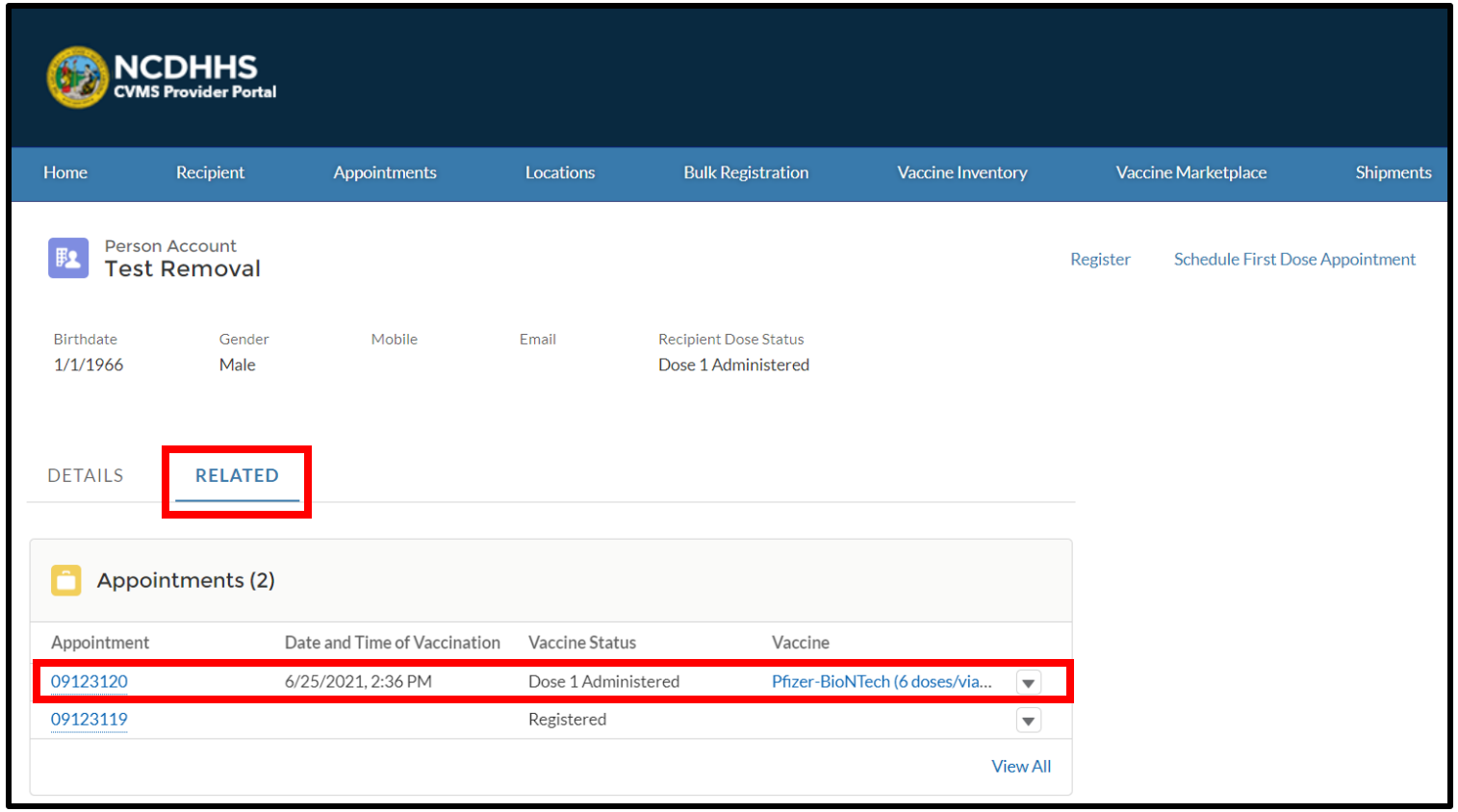
Audience

Healthcare Location Manager

Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

1. Click on the **RELATED** tab under the recipient's name to view appointment information
2. Select the appointment record that needs to be completely removed from CVMS (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED, DOSE 2 ADMINISTERED, or ADDITIONAL DOSE / BOOSTER ADMINISTERED**)



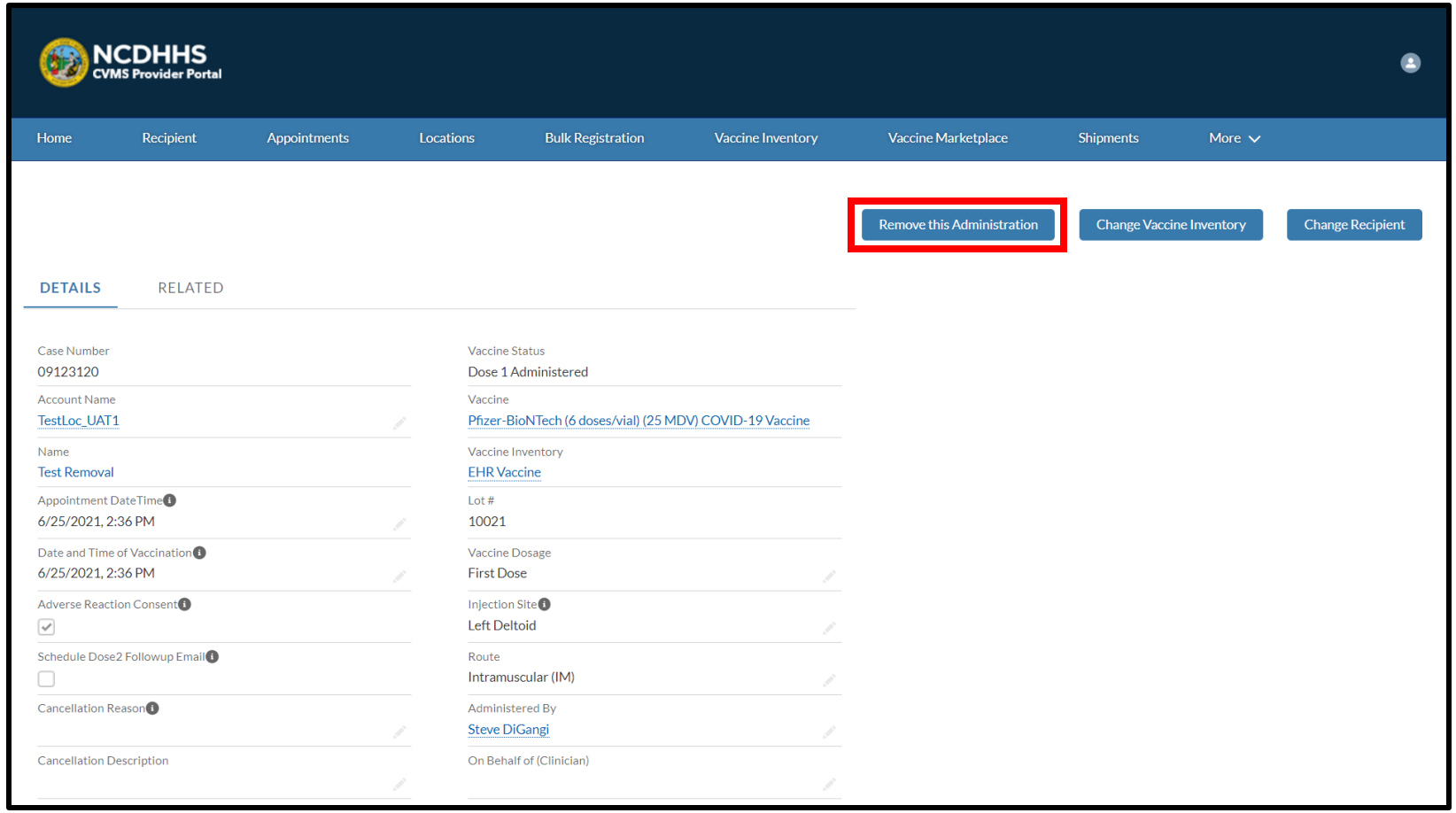
Audience

Healthcare Location Manager

Step 4 of 5: Remove Administration from Recipient

Selecting the appointment record takes you to the appointment details screen.

Click **REMOVE THIS ADMINISTRATION** in the top right corner to clear the record of the **VACCINE ADMINISTRATION** from CVMS.



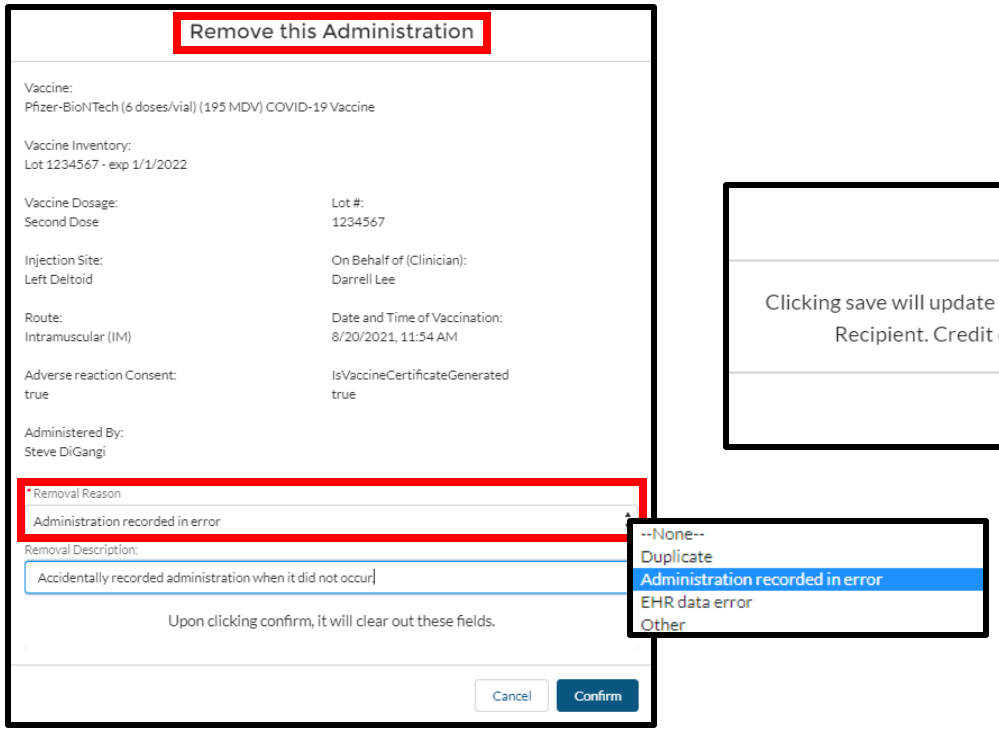
Audience

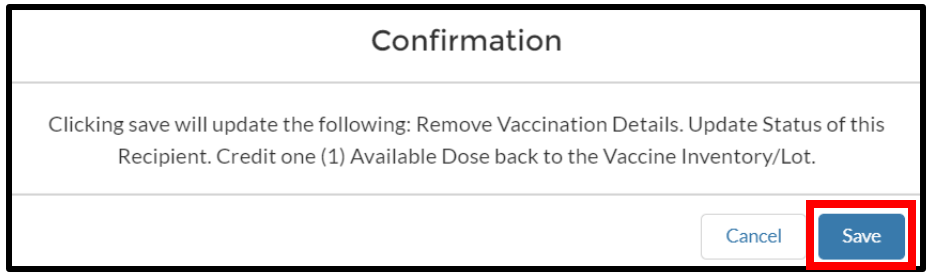
Healthcare Location Manager

Step 5 of 5: Confirm Vaccine Administration Removal

A pop-up box will appear.

1. Verify the details of the vaccine administration that you intend to remove
2. Select a required **REMOVAL REASON** from the drop-down list
3. Enter an optional **REMOVAL DESCRIPTION** to elaborate on the vaccine administration removal
4. Click **CONFIRM**
5. When the final confirmation screen appears, select **SAVE**
6. The vaccine administration data will be removed from the recipient's record, and the vaccine inventory record will be credited by one available dose





Audience

Healthcare Location Manager

Tips

The status of the recipient will be reverted to their previous status, (e.g., 'Dose 1 Administered' will revert to 'Dose 1 Cancelled').

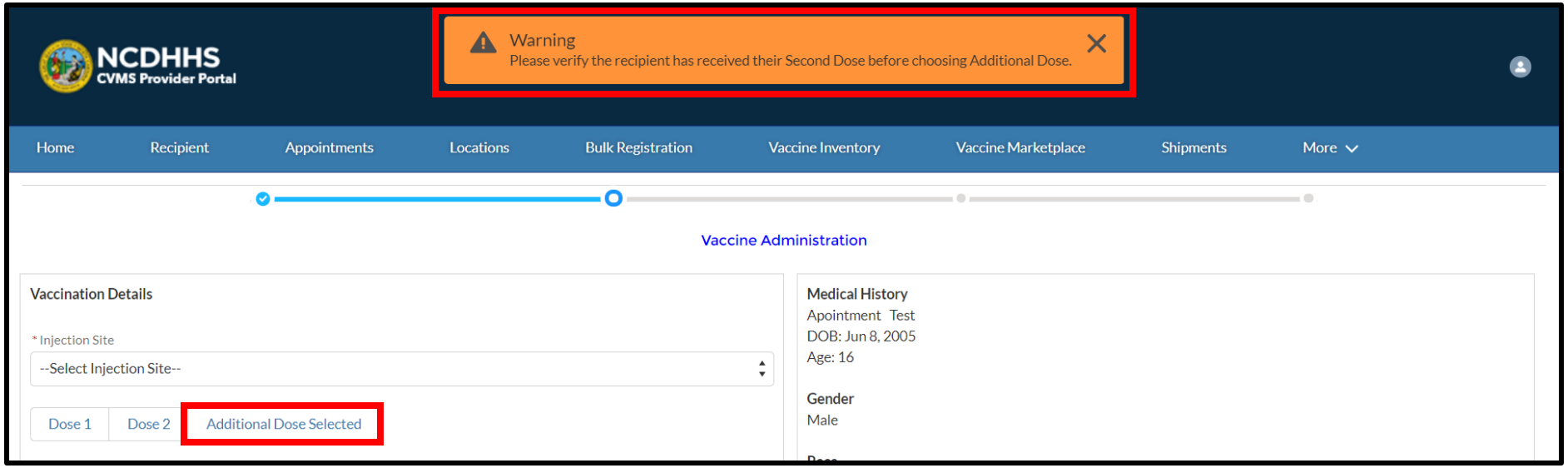
NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Enter an Additional Dose / Booster Administration

Additional Dose / Booster Considerations

When selecting which dose the recipient is receiving, you have the option of choosing **ADDITIONAL DOSE / BOOSTER**. The **ADDITIONAL DOSE / BOOSTER** selection should be used when a recipient is getting any administration of a COVID-19 vaccine **AFTER THE SECOND DOSE**. If you select **ADDITIONAL DOSE / BOOSTER** for a recipient who does not have a Dose 2 recorded in CVMS, you will see a warning message appear at the top of the screen.

A recipient may receive a vaccine administration of **DOSE 1, DOSE 2**, and multiple **ADDITIONAL DOSE** administrations until there are **SIX** total administrations. Once they have received six total administrations, the recipient will not be able to book another appointment or have another vaccine administration logged into CVMS.



Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

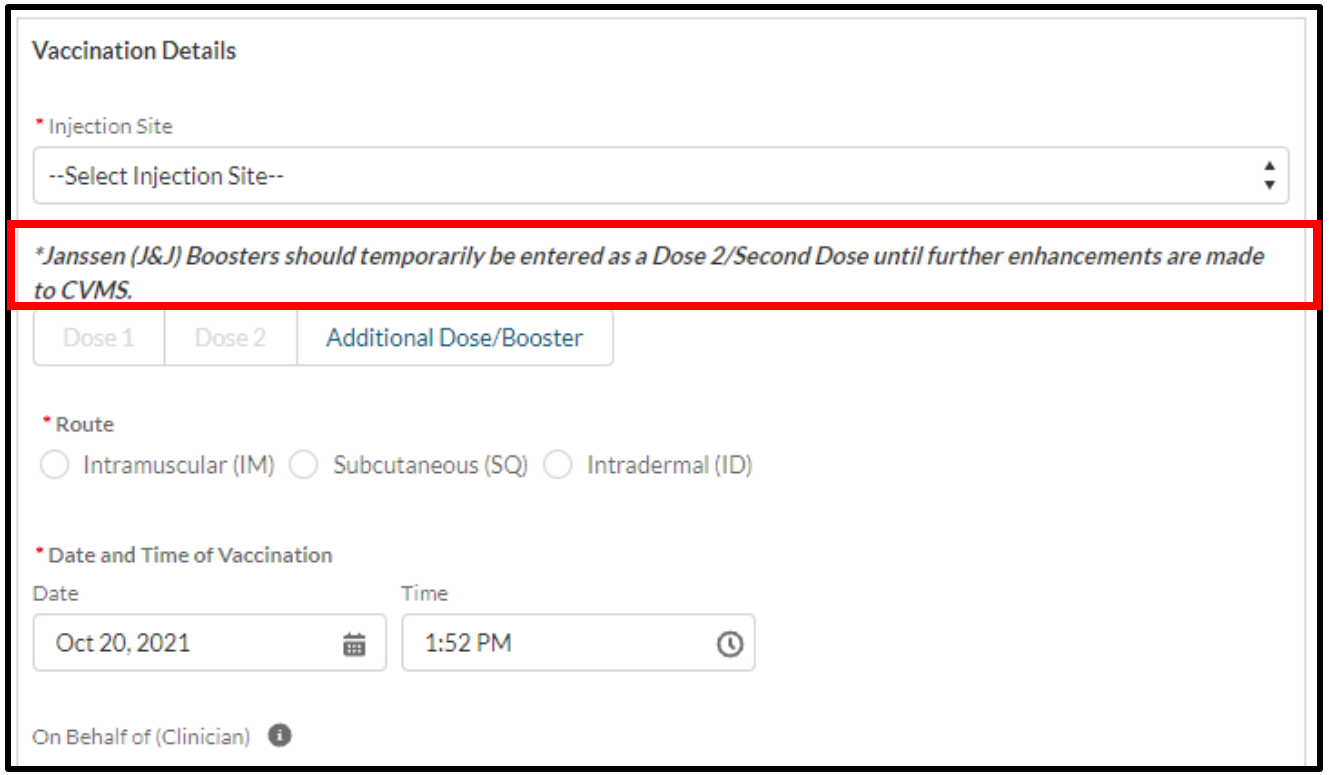
Tips

Please review the CDC website at https://www.cdc.gov/coronavirus for the most up-to-date information regarding the guidance for additional doses.

For more detailed clinical guidance, please visit: https://www.cdc.gov/vaccines/covid-19/clinical-considerations/covid-19-vaccines-us.html

Janssen (J&J) Additional Dose / Booster

Once appropriate guidance is provided by the CDC and NCDHHS for administering Janssen (J&J) additional dose/boosters, CVMS will allow the additional dose/booster administration to be recorded. A message will now display on the Vaccine Administration screen under **VACCINE DETAILS** directing providers to enter the administration as **DOSE 2/SECOND DOSE** until further notice.



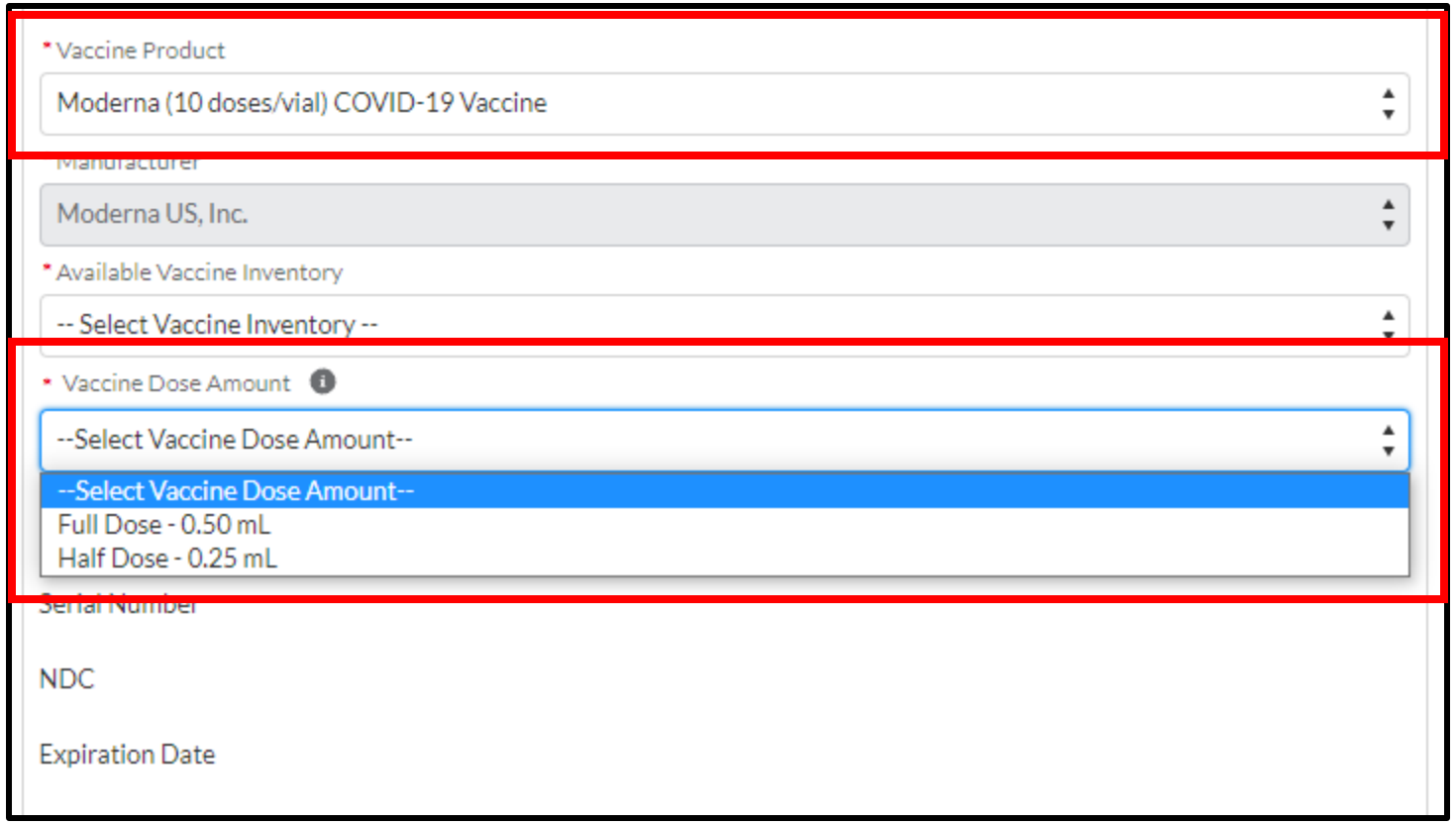
Audience

- **Healthcare Provider**
- **Healthcare Location Manager**
- **Statewide Location Manager**

Moderna Additional Dose / Booster

Moderna's booster vaccine is 50% of the regular dose. If the **VACCINE PRODUCT** selected is Moderna, CVMS will generate a **VACCINE DOSE AMOUNT** box where a provider must select whether a full dose or a half dose was administered.

***Note**: Recipients who received Moderna and are moderately to severely immunocompromised are recommended to receive a full dose of the Moderna vaccine as an additional dose to their original two dose series.*



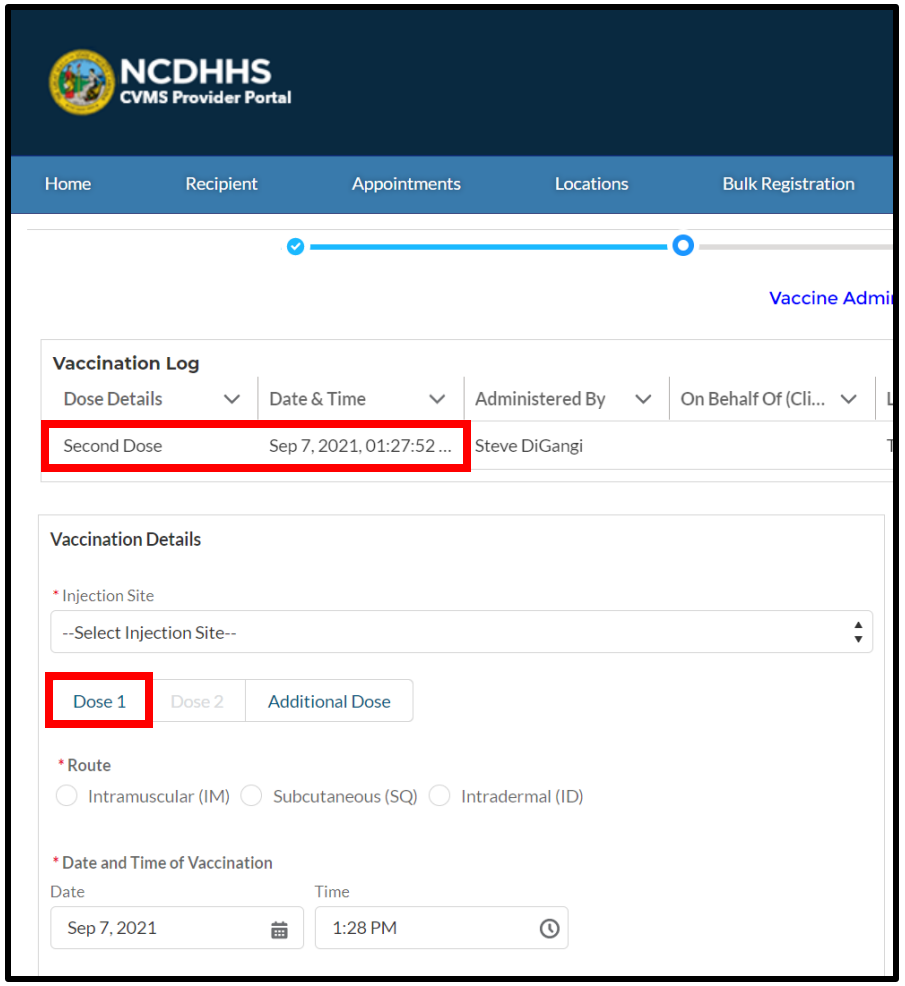
Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Enter Dose Administration Records Out of Order

Out of Order Dose Considerations

On rare occasions, a recipient will already have the vaccine administration details logged for a second dose before the first dose has been entered into CVMS. When that occurs, the vaccinating provider can retroactively log the first dose if the first dose was administered by the same provider location.



To log the **DOSE 1** vaccine administration details:

1. Use the **APPOINTMENT WALK-IN TOOL** to book an appointment for the recipient
2. Begin logging vaccine administration details, and select the **DOSE 1** button (the **DOSE 2** button will be grayed out, and **DOSE 2** details will appear at the top of the screen)
3. Correct the date and time to the date of administration
4. Verify the other vaccine administration details, and submit the administration

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

This same process may be used to log a **DOSE 2** if an **ADDITIONAL DOSE / BOOSTER** has already been logged.

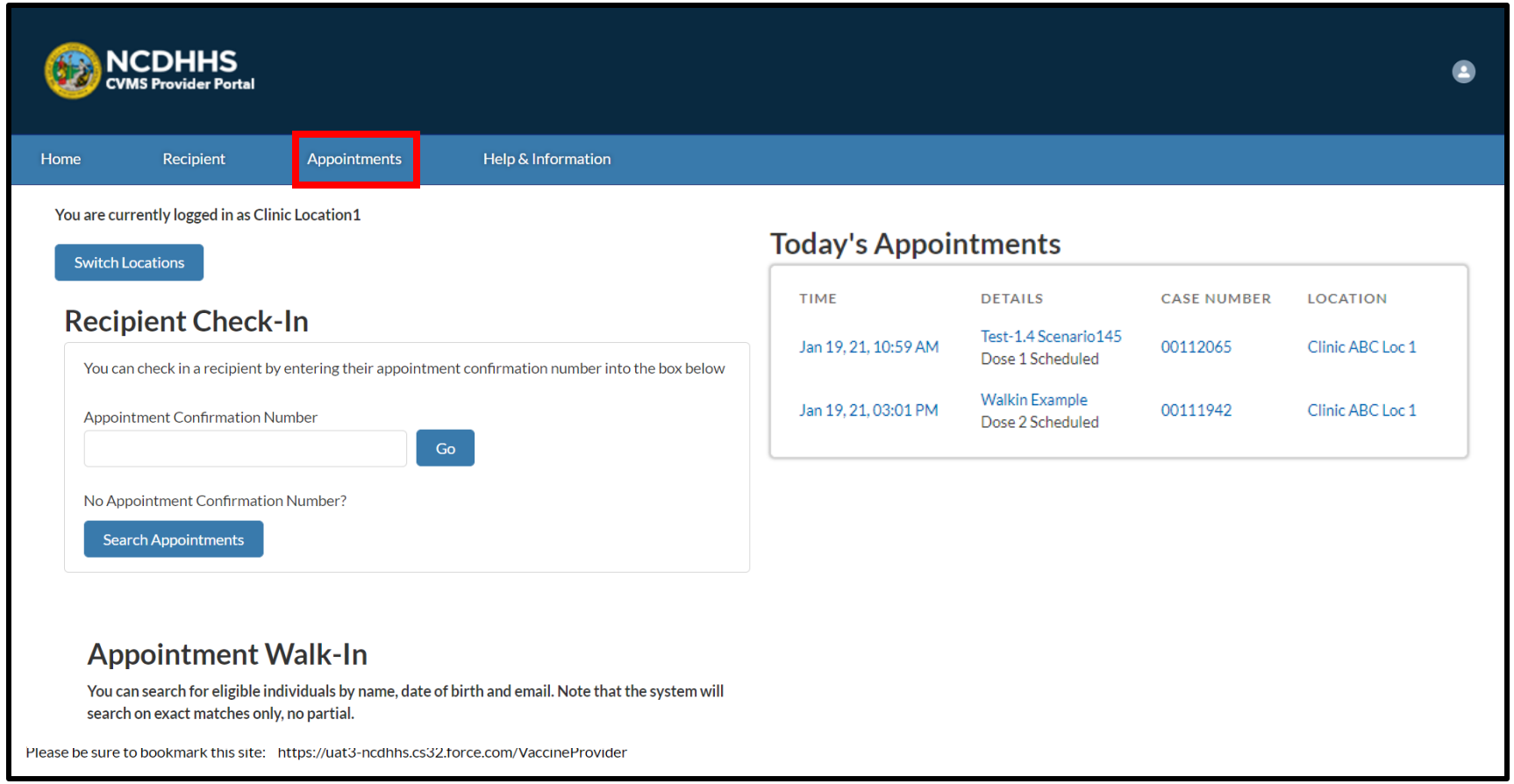
Do NOT enter in vaccine administration details for a vaccine dose that your location did not administer.

Cancel an Existing Appointment

Step 1 of 5: Navigate to the Appointments Tab

The process to cancel an existing appointment for a recipient begins on the **APPOINTMENTS** tab.

1. Navigate to the **APPOINTMENTS** tab



Audience

Healthcare Provider

Healthcare Location Manager

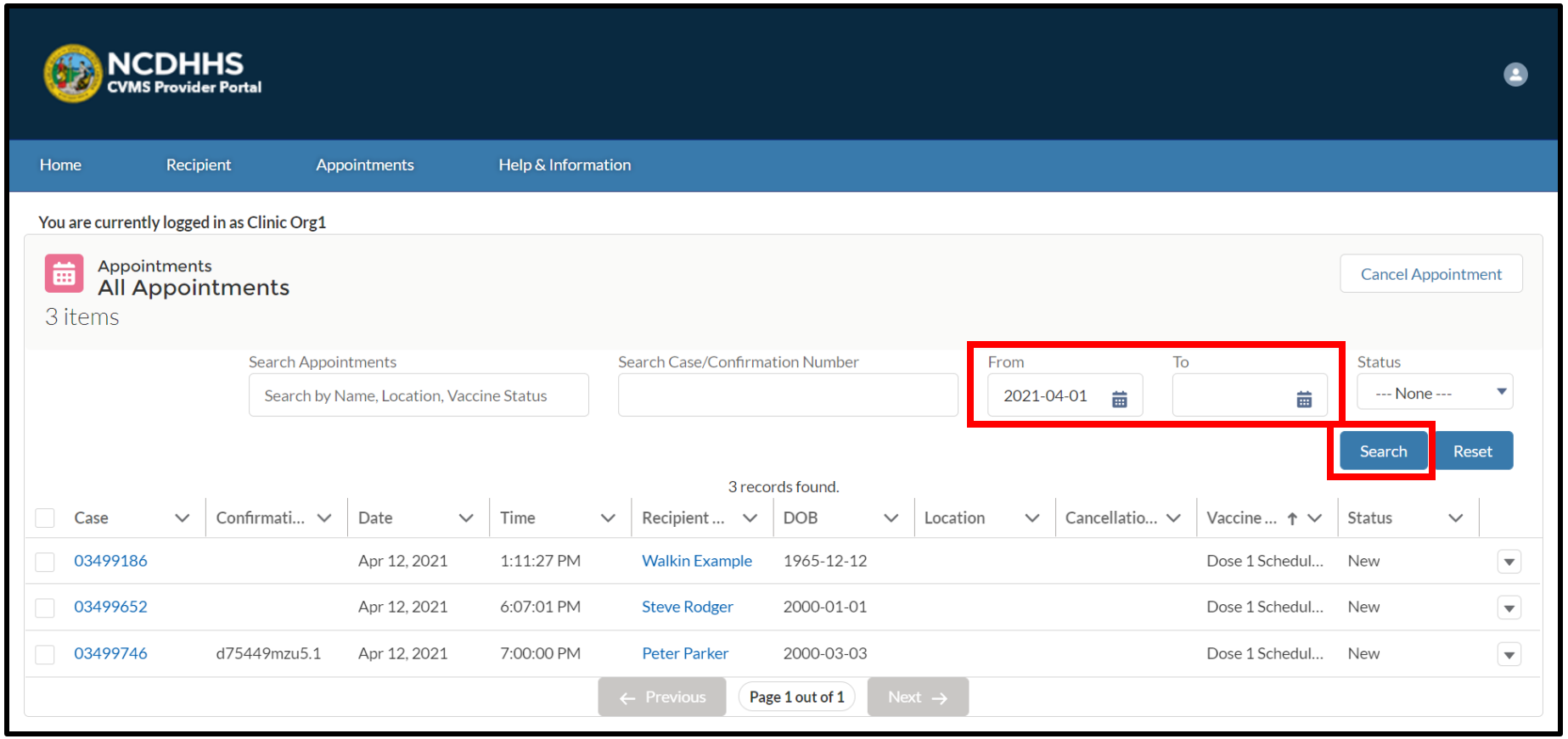
Statewide Location Manager

Tips

Providers using CVMS Direct (Electronic Health Record system integration with CVMS) may also notice cancelled appointments appearing in CVMS. Those appointments are created during the integration process and will be automatically cancelled and marked as **DUPLICATE** since they are a replica of the scheduled appointment.

Step 2 of 5: Search for the recipient

1. You can use the **SEARCH APPOINTMENTS** field to search for the recipient by **NAME**
2. Set the **FROM** and **TO** fields to include the date of the appointment that needs to be cancelled (the field will default to the current date)
3. Click **SEARCH**



Audience

Healthcare Provider

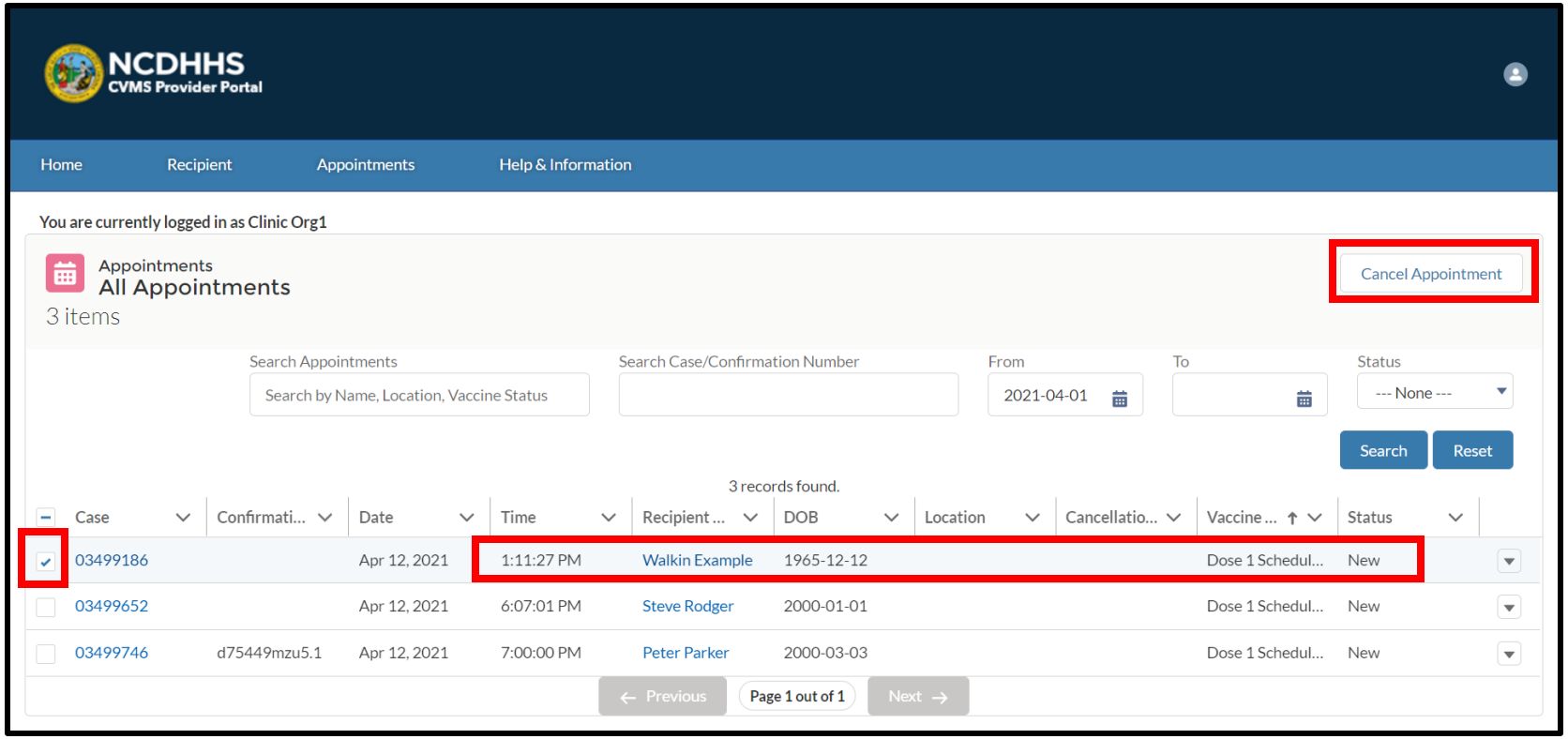
Healthcare Location Manager

Statewide Location Manager

Step 3 of 5: Locate the Appointment to Cancel

After clicking search, the existing **APPOINTMENTS** will populate underneath the Appointments List View.

1. Locate the correct **RECIPIENT** who needs an appointment cancelled
2. Verify the recipient's identity
3. Select the checkbox to the left of the recipient's name
4. Select the **CANCEL APPOINTMENT** button



Audience

Healthcare Provider

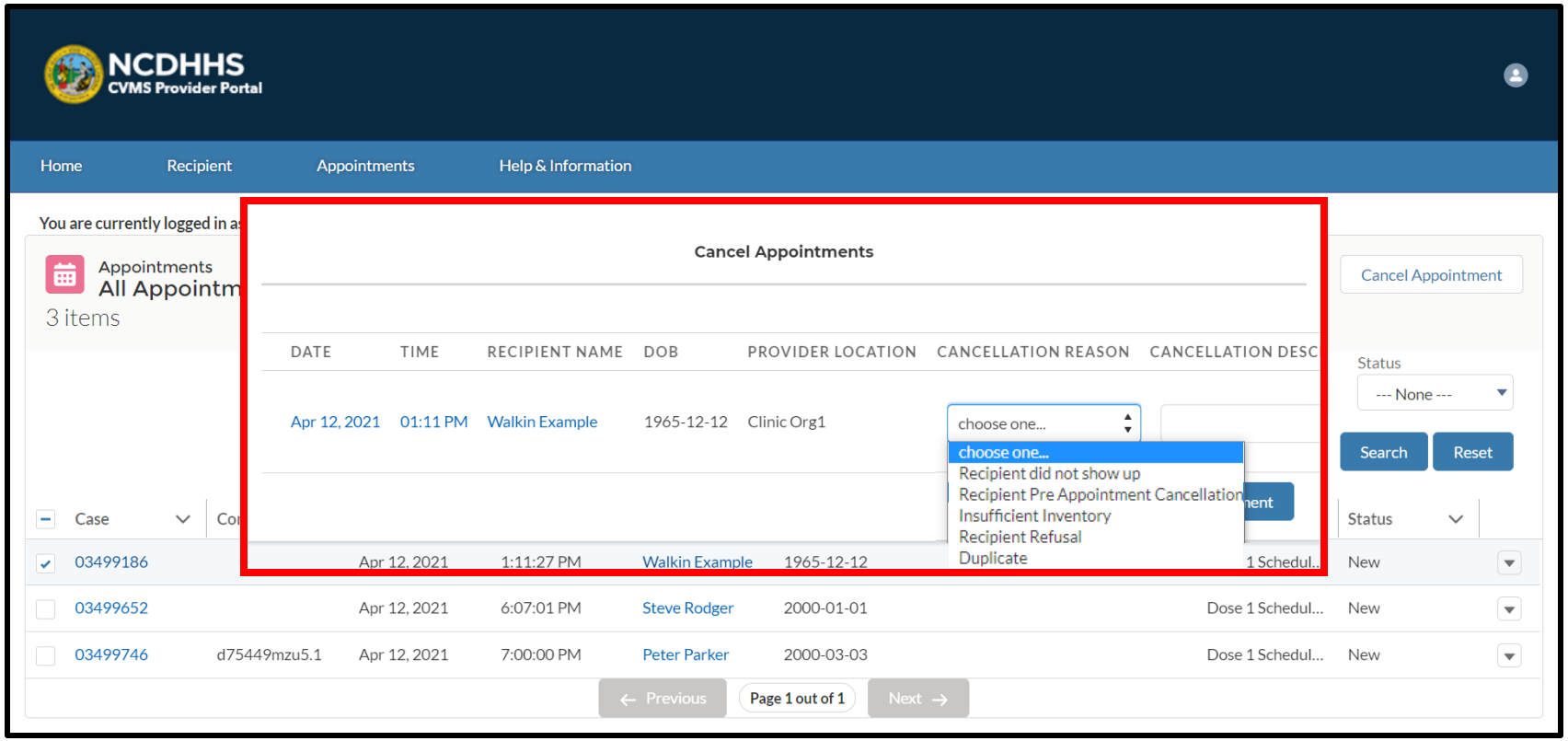
Healthcare Location Manager

Statewide Location Manager

Step 4 of 5: Cancel the Appointment

Selecting the **CANCEL APPOINTMENT** button will initiate a pop-up window to appear on the screen.

1. Input a **CANCELLATION REASON** from the drop-down menu (you may optionally add a cancellation description in the free text field)
2. Select the **CANCEL APPOINTMENT** button



Audience

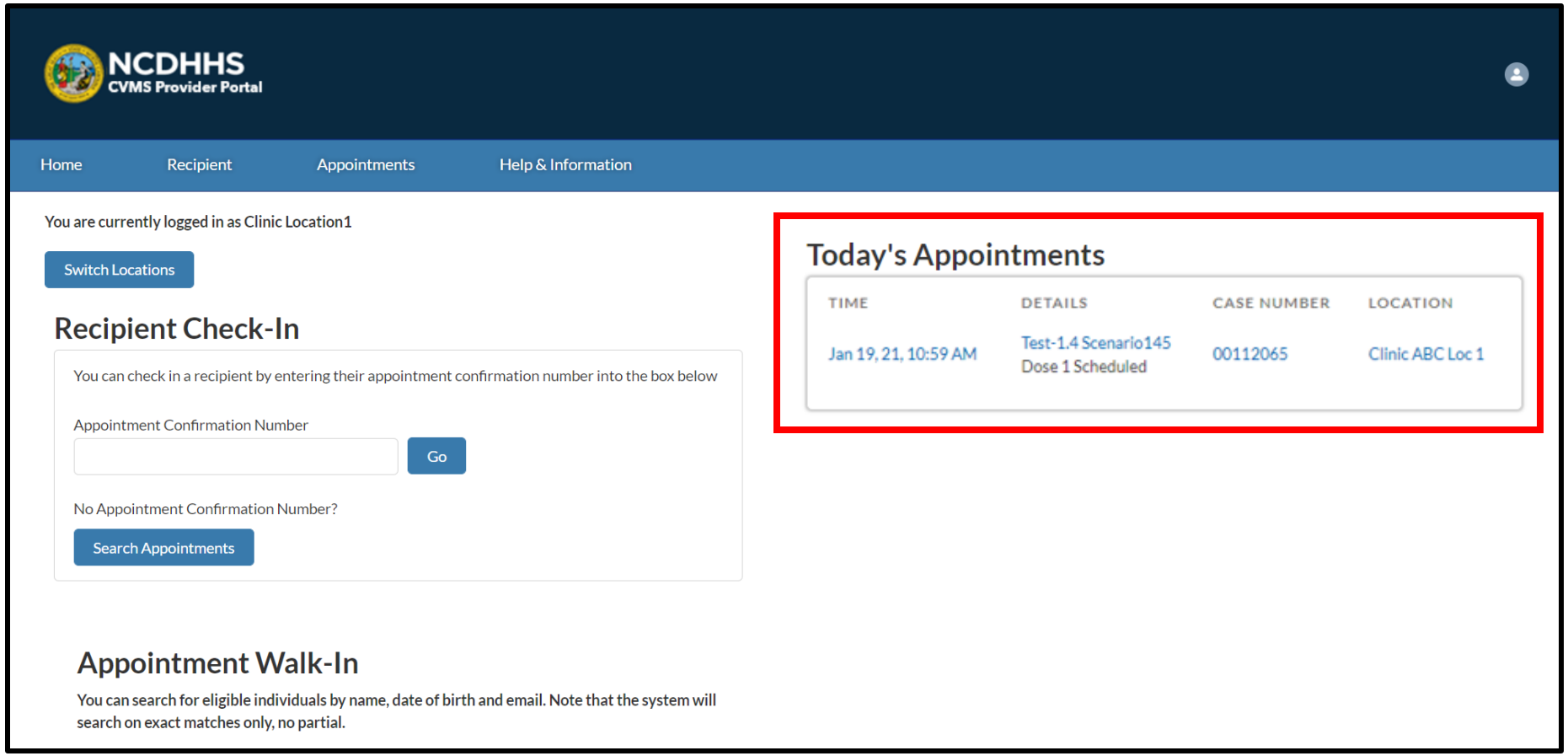
Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Step 5 of 5: Confirm the Appointment is Cancelled

The recipient should no longer have their appointment booked. If the recipient's appointment was for today, the recipient should no longer appear on the **TODAY'S APPOINTMENTS** tool.



Audience

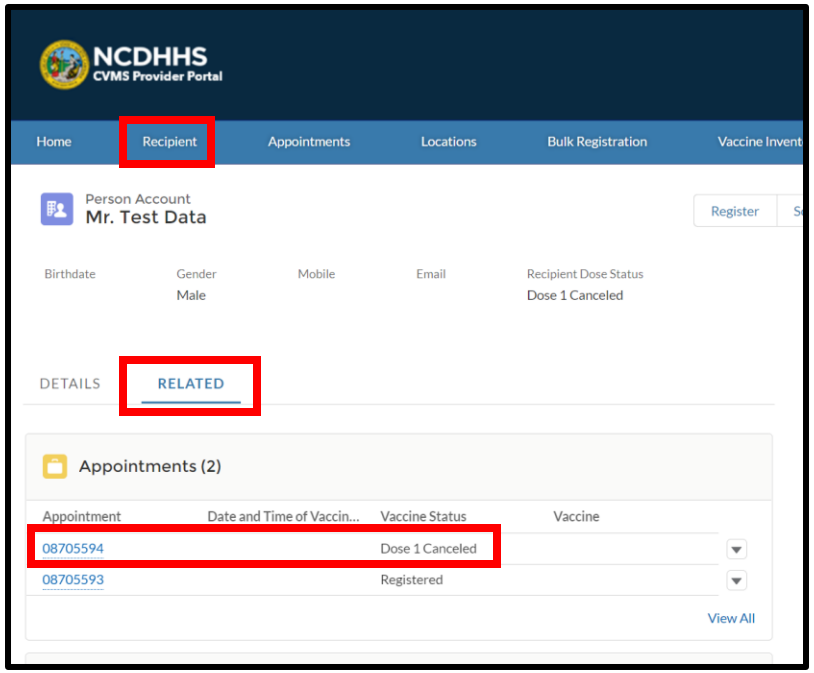
- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Automated Cancellation

There are a few scenarios that may result in an automatic cancellation:

→ if a recipient is manually added to **TODAY'S APPOINTMENTS** but does not complete their appointment within 72 hours, the appointment will be **AUTOMATICALLY** cancelled, and their Dose Status will update to **DOSE 1 CANCELLED, DOSE 2 CANCELLED, or ADDITIONAL DOSE / BOOSTER CANCELLED).**

→ if a recipient creates multiple scheduled appointments (for example at different locations in hopes of being vaccinated as quickly as possible), all the remaining appointments will be automatically cancelled as soon as one of the appointments is changed to a **DOSE 1 ADMINISTERED, DOSE 2 ADMINISTERED, OR ADDITIONAL DOSE / BOOSTER ADMINISTERED** status



Audience

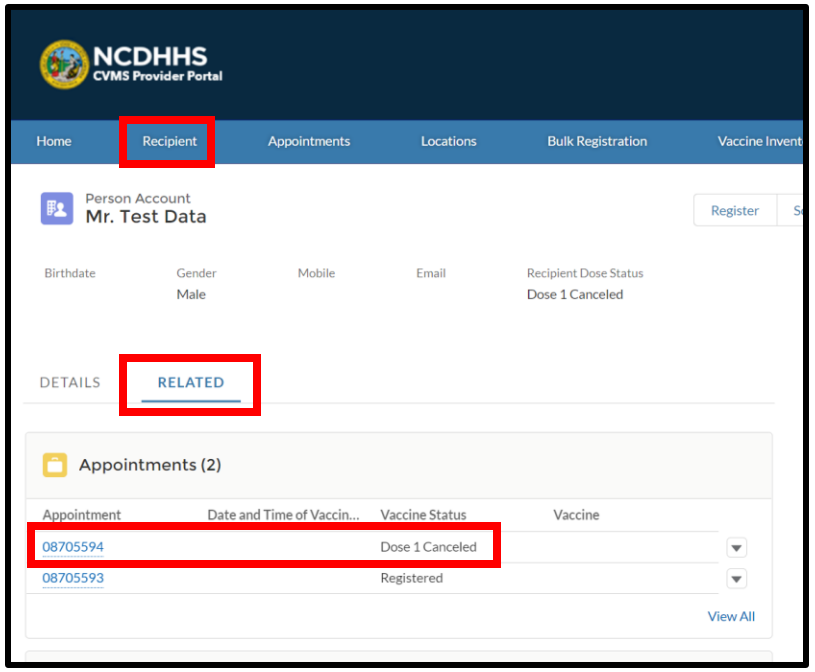
Healthcare Provider

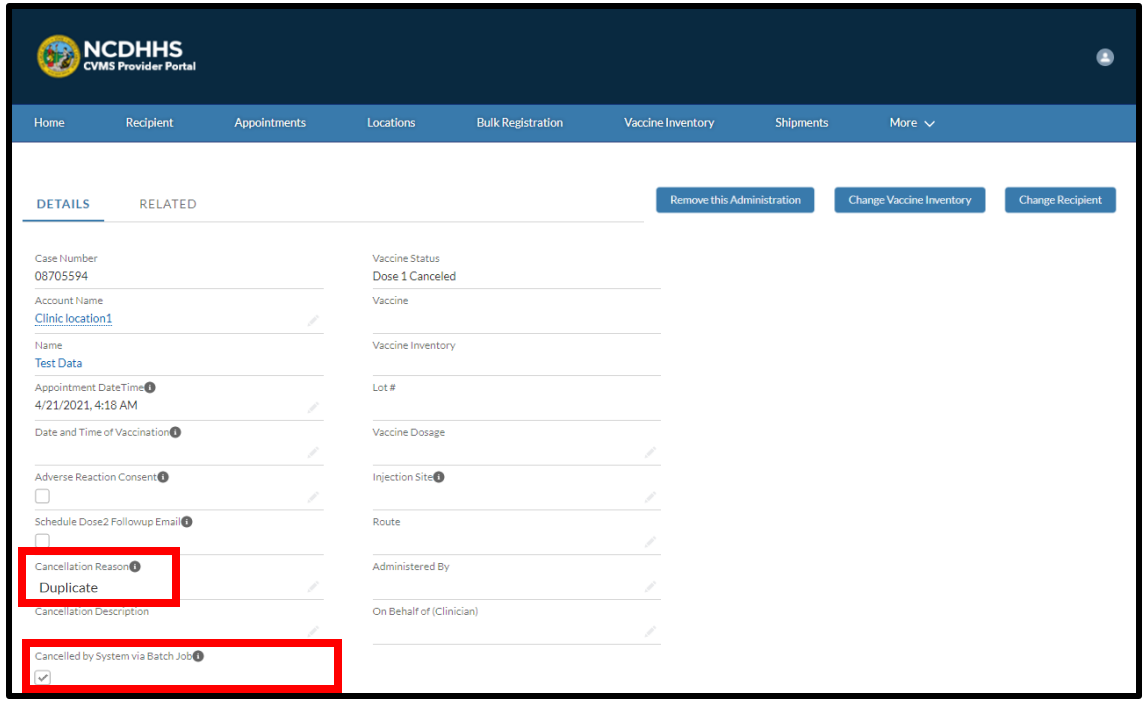
Healthcare Location Manager

Statewide Location Manager

View Appointment / Cancellation History

To view a record of a recipient's appointment history, navigate to the Recipient tab, locate the recipient's record, and select **RELATED** tab. The recipient's appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.





Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

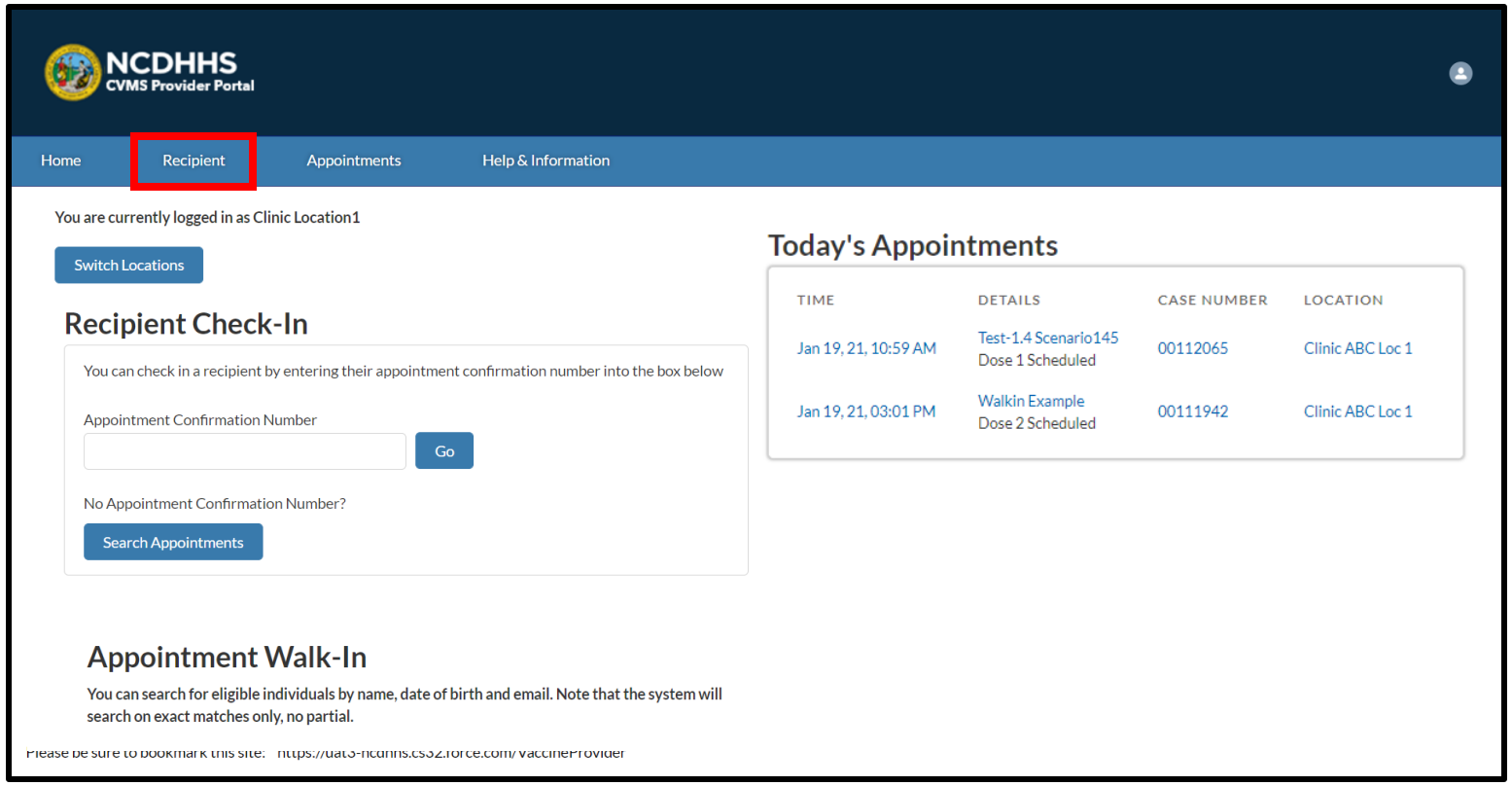
If an appointment was cancelled automatically, the **CANCELLED BY SYSTEM VIA BATCH JOB** field will be checked.

Mark a Recipient as Deceased

Step 1 of 5: Navigate to the Recipients Tab

Providers can mark a recipient as deceased within CVMS to ensure that no further system-generated communications are sent to the deceased recipient's email address.

1. Navigate to the **RECIPIENT** tab



Audience

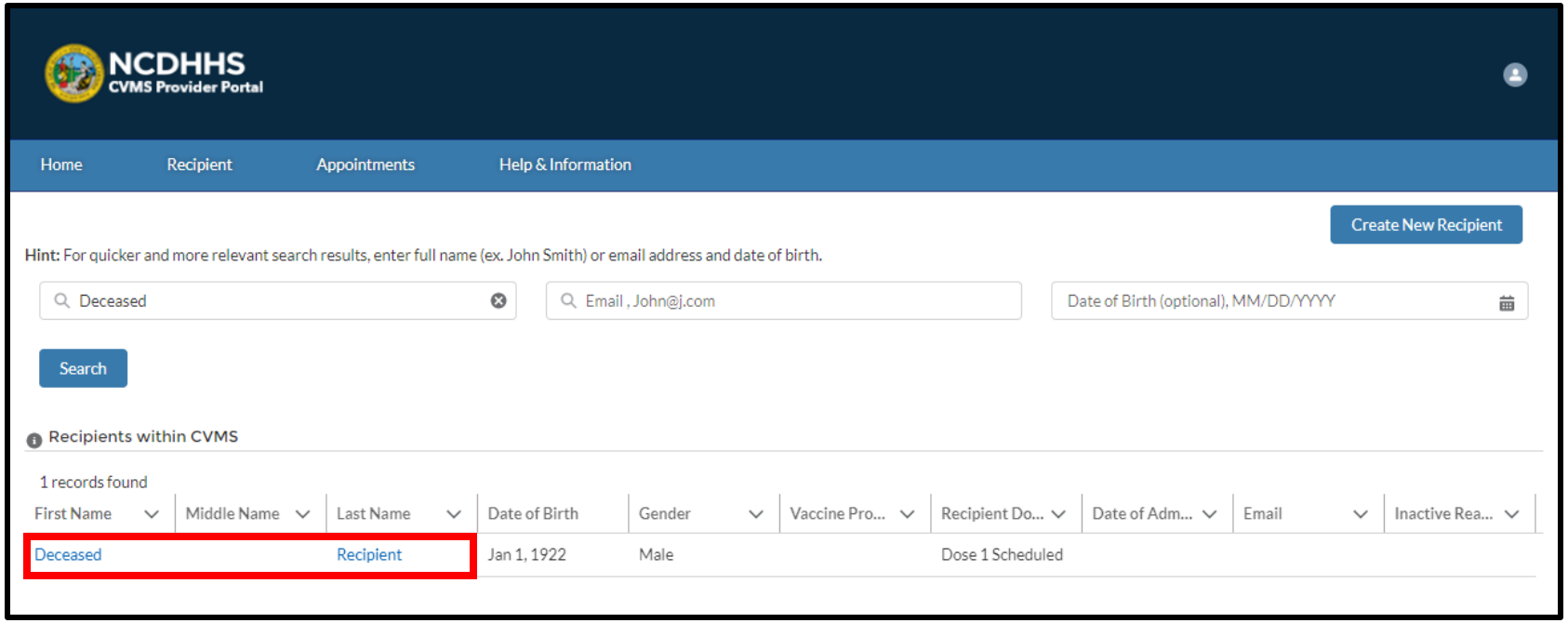
- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 2 of 5: Search for the Recipient

1. Enter the deceased recipient's **NAME** (first name and last name) in the search bar
2. To help narrow results, enter the recipient's **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

***Note**: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself*

3. Click **SEARCH**
4. Click the name of the **DECEASED RECIPIENT**

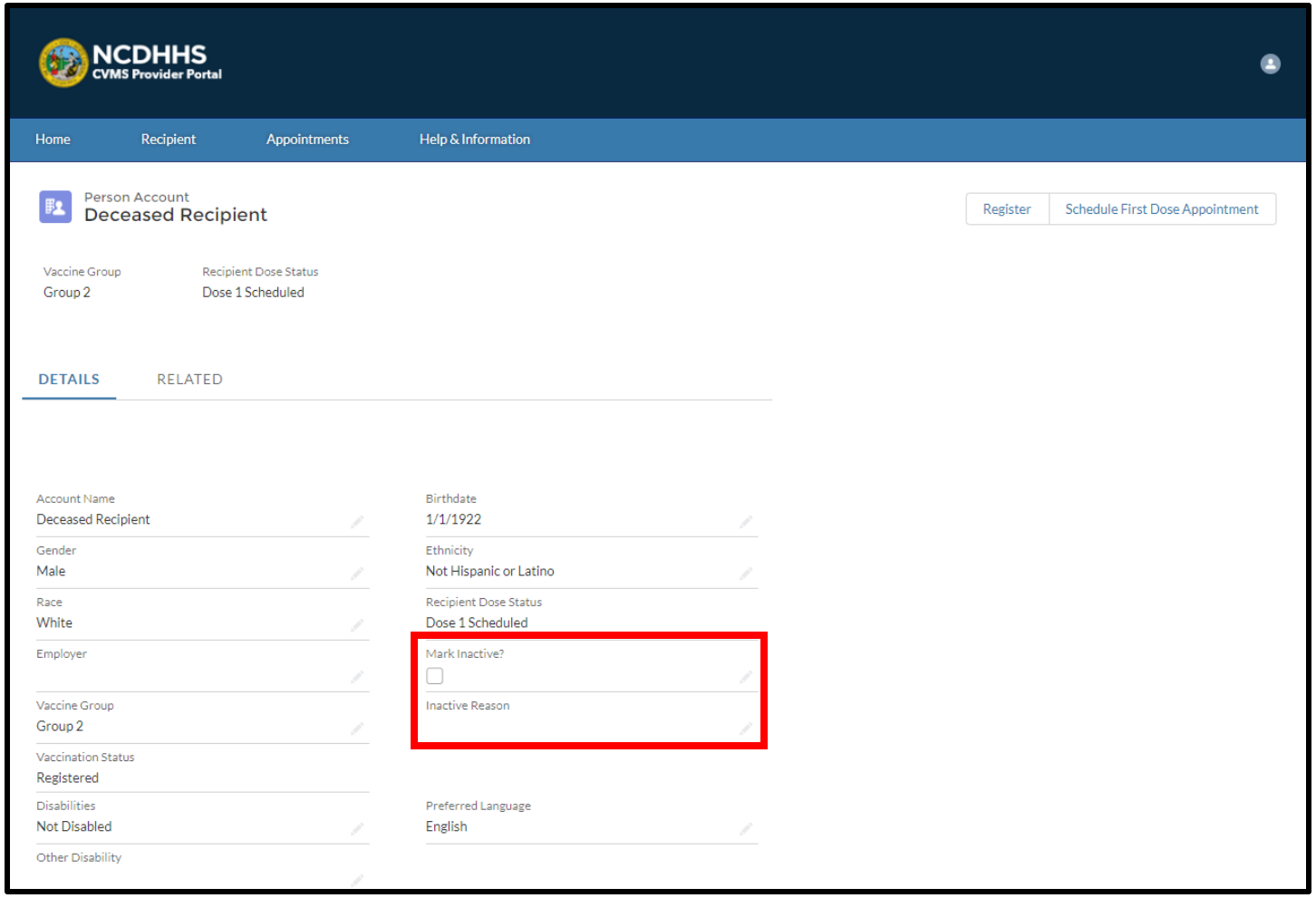


Audience

- **Healthcare Provider**
- **Healthcare Location Manager**
- **Statewide Location Manager**

Step 3 of 5: Edit Recipient Record

1. Click the pencil icon next to the **MARK INACTIVE** field



Audience

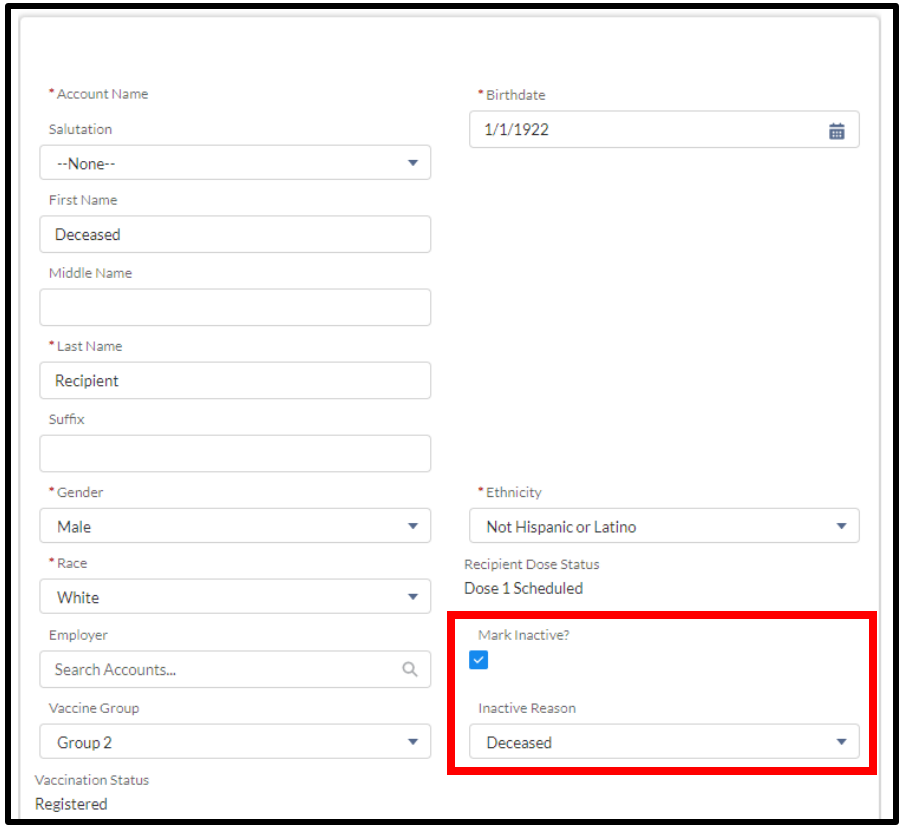
Healthcare Provider

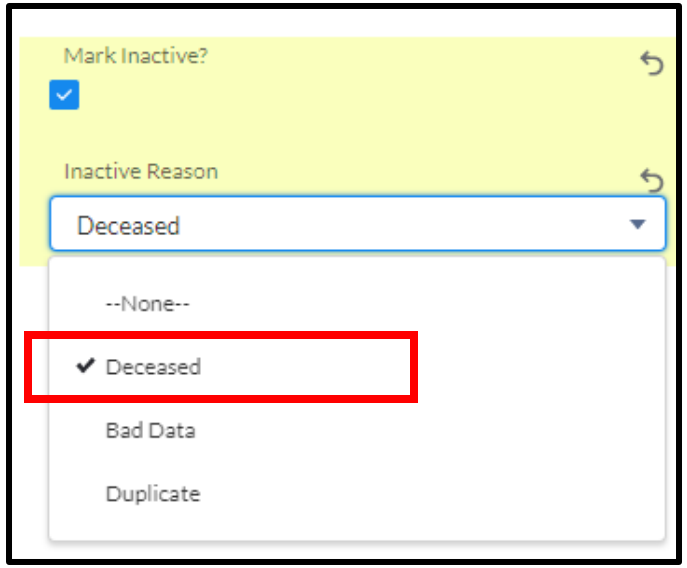
Healthcare Location Manager

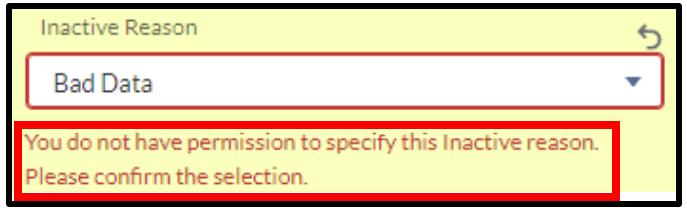
Statewide Location Manager

Step 4 of 5: Mark Recipient as Deceased

1. Check the box under the **MARK INACTIVE** field
2. From the drop-down menu for **INACTIVE REASON,** select **DECEASED**







***Note**: If you select **BAD DATA** or **DUPLICATE** you will receive an error message.*

Audience

Healthcare Provider

Healthcare Location Manager

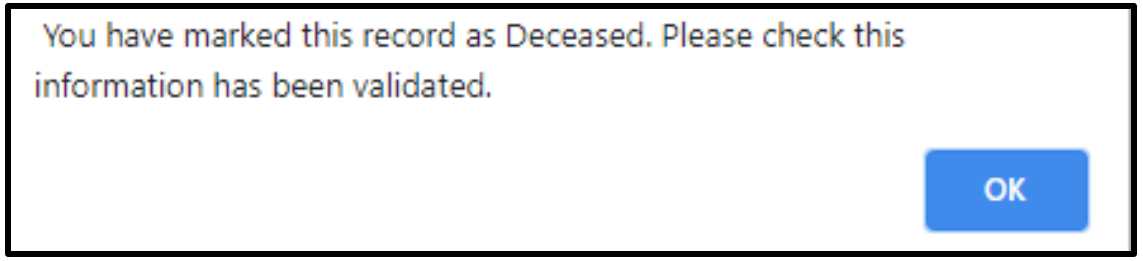
Statewide Location Manager

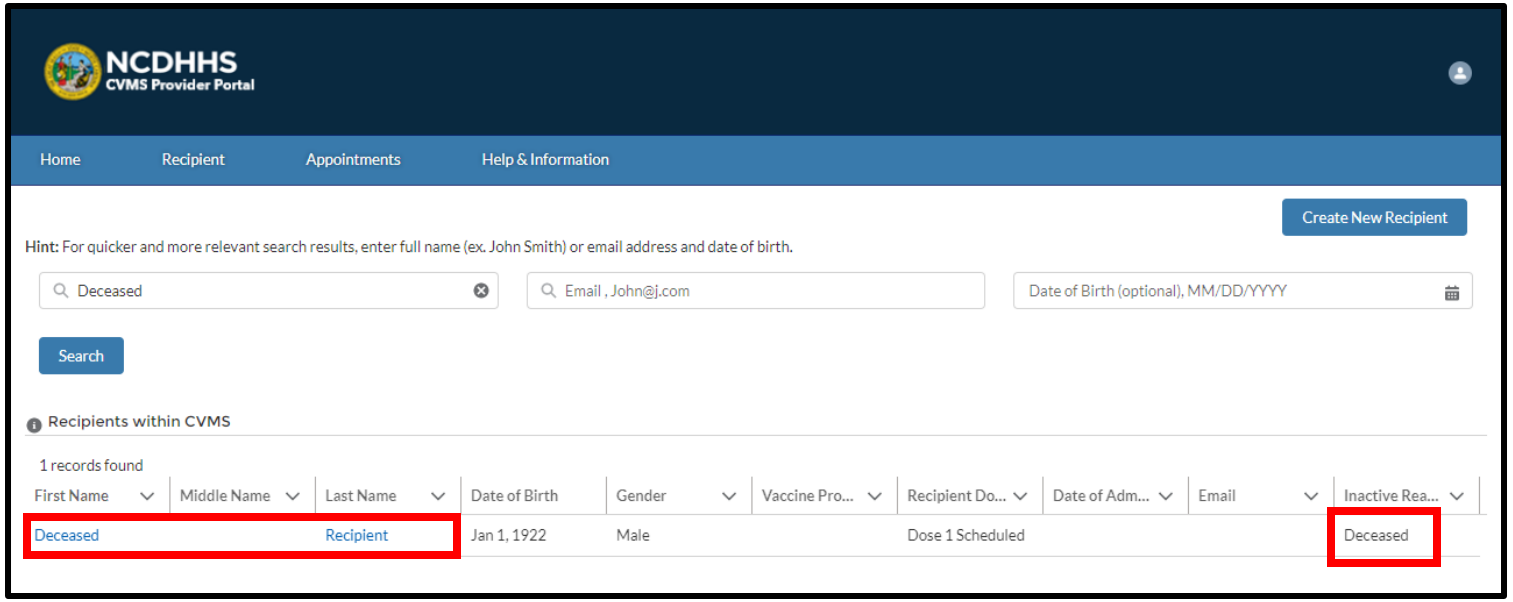
Tips

If a recipient record needs to be marked inactive because it is either bad data or a duplicate of another record, please submit a request through the **CVMS HELP DESK PORTAL at** https://ncgov.servicenowservices.com/csm_vaccine**.**

Step 5 of 5: Confirm Update

1. After updating the recipient's record to **DECEASED**, a pop-up message appears asking you to confirm that the information has been validated
2. On the Recipient tab, the deceased recipient will now show **DECEASED** in the **INACTIVE REASON** column





Audience

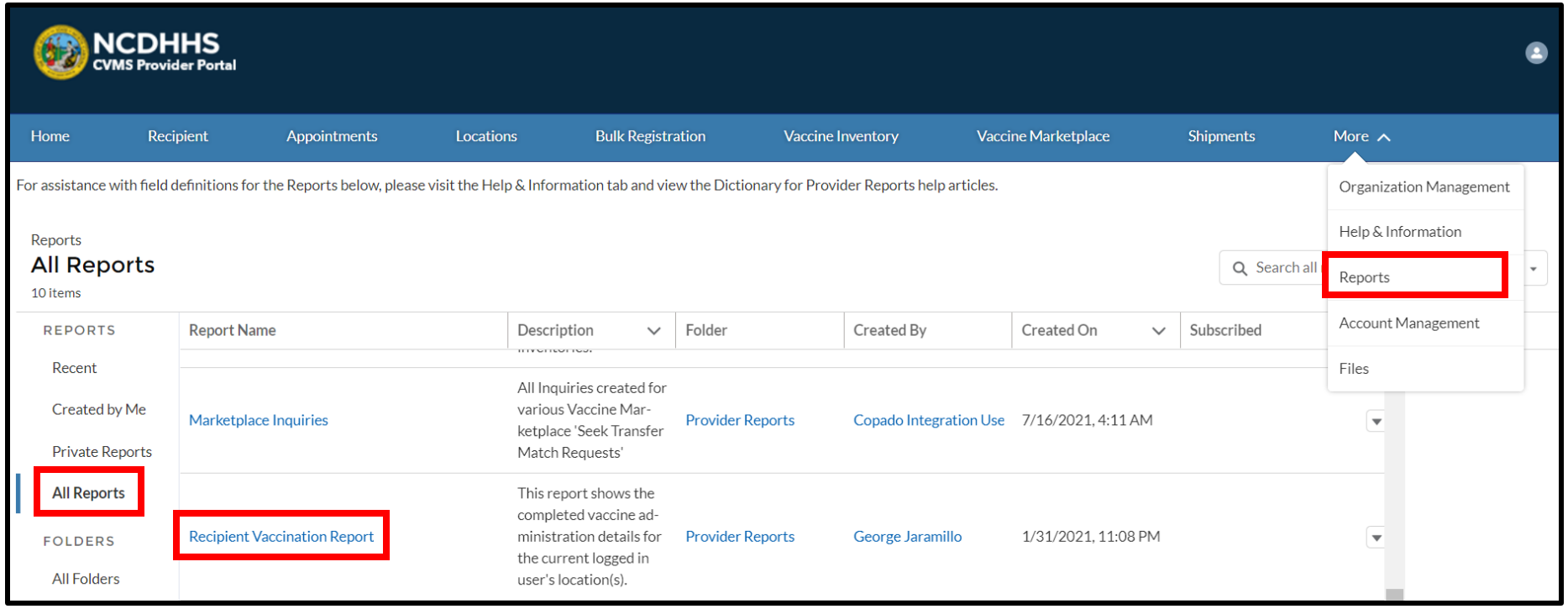
- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Review Recipient Vaccination Report

Step 1 of 2: Navigate to the Reports Tab

Healthcare Location Managers may also run a report in the CVMS Provider Portal that shows a roll-up of recipient vaccination information at your location. Vaccine administration data can be reviewed directly in CVMS or can be exported as a .CSV file to Microsoft Excel.

1. Navigate to the **REPORTS** tab
2. Select **ALL REPORTS**
3. Click **RECIPIENT VACCINATION REPORT**



Audience

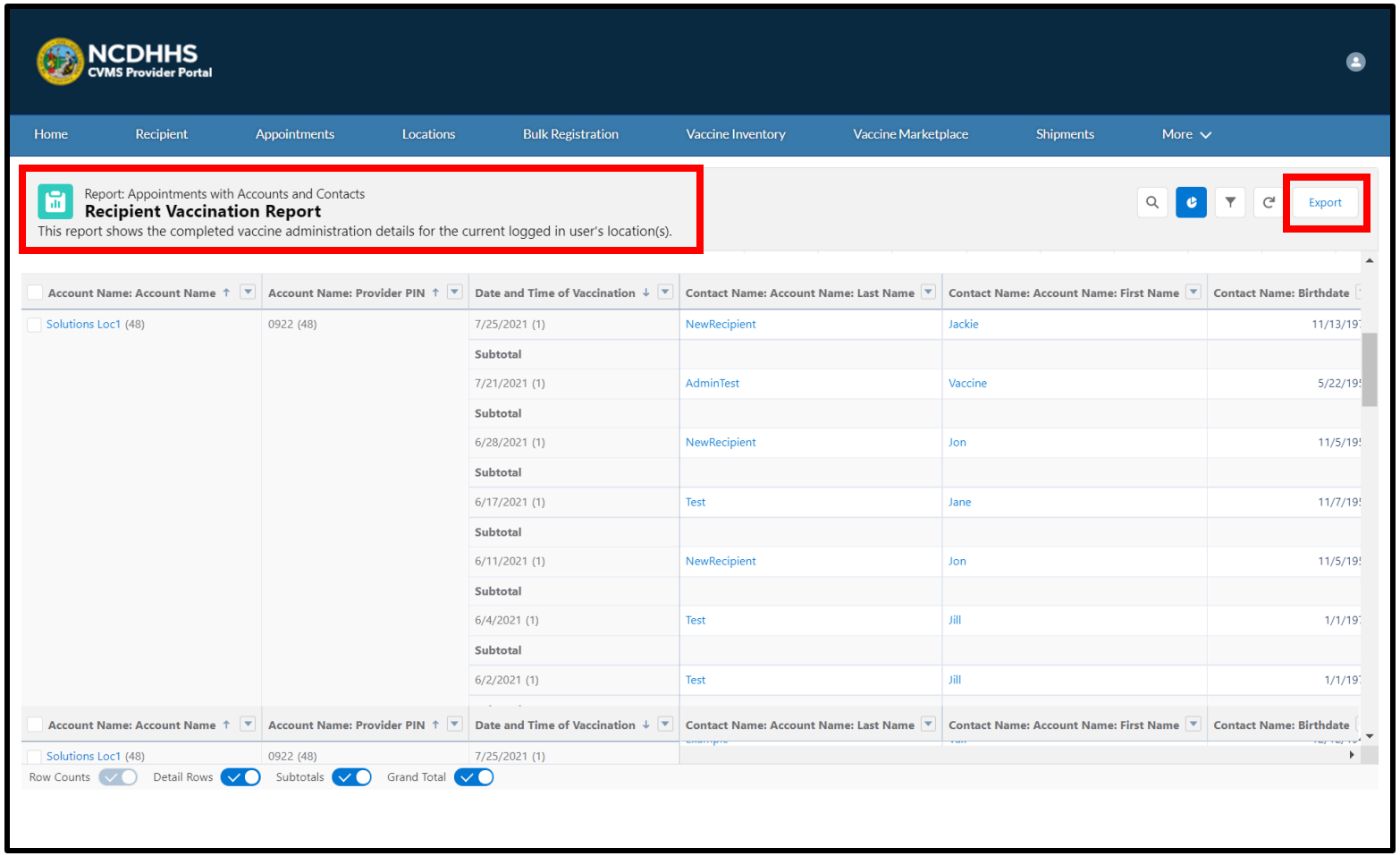
Healthcare Location Manager

Tips

To learn more on using reports in **CVMS,** please check the **Step 5 – 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.

Step 2 of 2: Review Recipient Vaccination Report

1. Sort, filter, or review the report as needed
2. Click **EXPORT** if you would like to download the data into a spreadsheet



Audience

Healthcare Location Manager

Checking-in a Recipient at the Front-desk (Locations that enabled the scheduling feature in CVMS)

For information on how to enable the scheduling feature in CVMS, please refer to the **Step 9 – Invite Recipients to Self-Schedule Their Appointments User Guide** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers

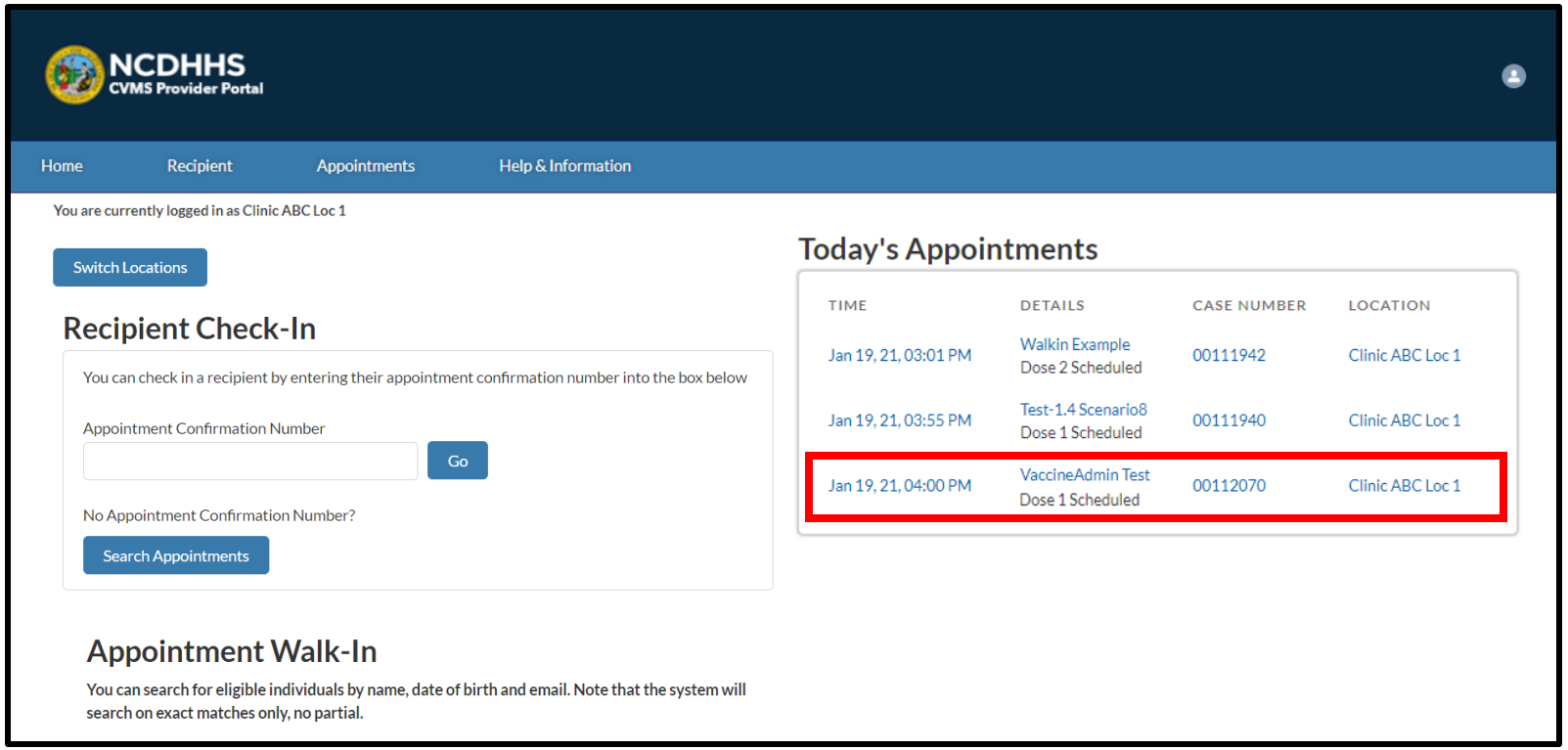
Check-In Recipients with Scheduled Appointments

Method 1: Begin Vaccine Administration through Today's Appointments

There are three methods to begin the **VACCINE ADMINISTRATION** process.

The provider who will administer the COVID-19 vaccine can select the Recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE** which will begin the **VACCINE ADMINISTRATION** process.

1. Click on the **RECIPIENT'S NAME** to begin the Vaccine Administration
2. Begin **VACCINE ADMINISTRATION**



Audience

Healthcare Provider

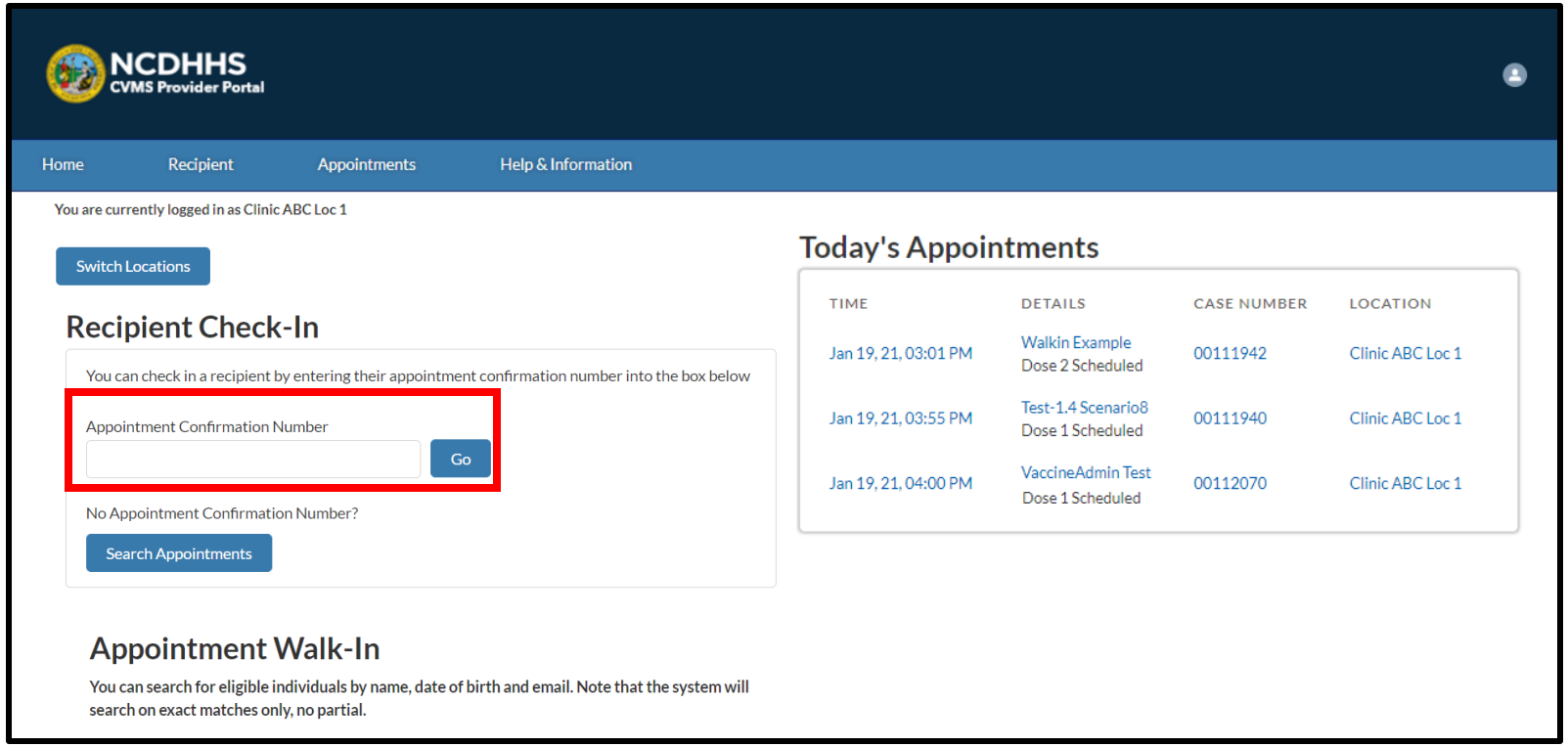
Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Method 2: Enter the Appointment Confirmation Number

Alternatively, you can begin the **VACCINE ADMINISTRATION PROCESS** by entering the Recipient's **APPOINTMENT CONFIRMATION NUMBER** that they received after scheduling their appointment online using the scheduling feature in CVMS.

1. Enter the **APPOINTMENT CONFIRMATION NUMBER** under the Recipient Check In tool
2. Click **GO** to begin the **VACCINE ADMINISTRATION**



Audience

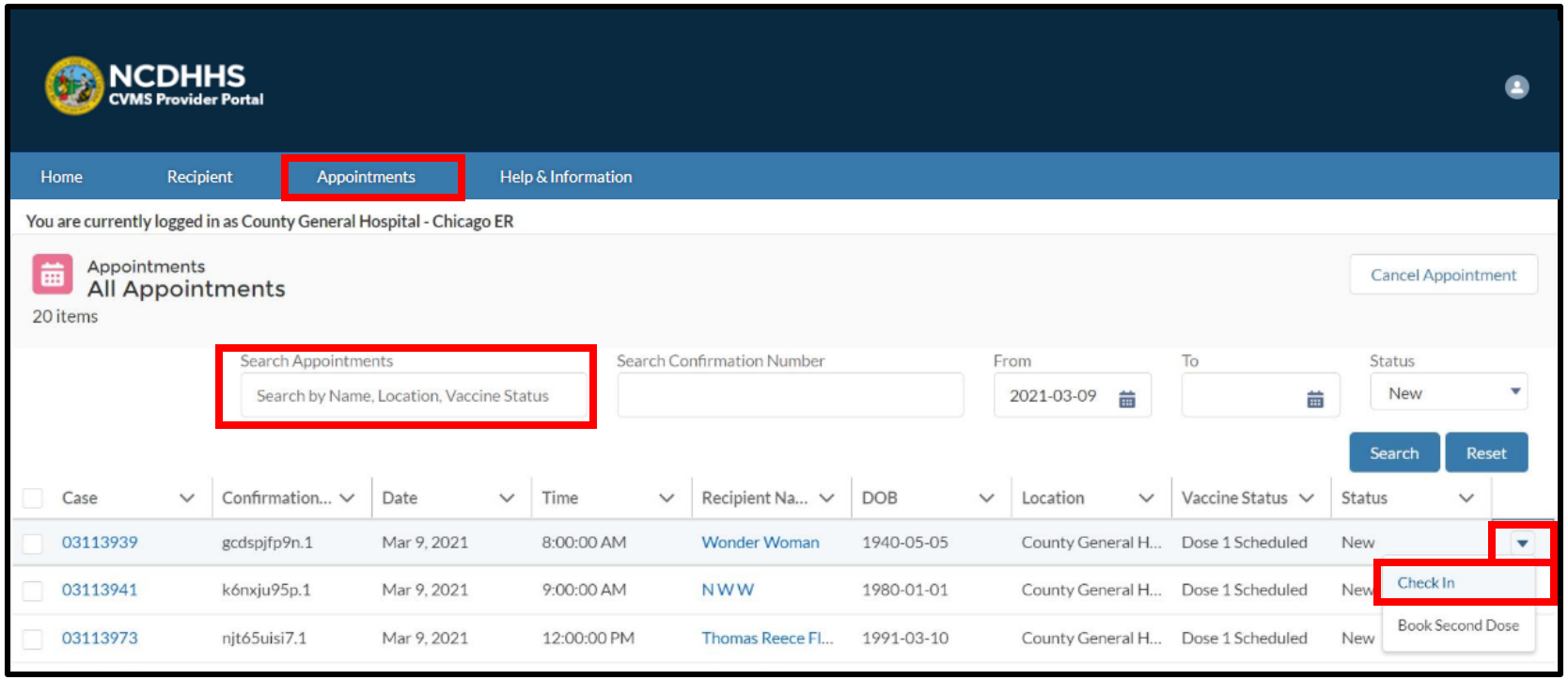
Healthcare Provider

Healthcare Location Manager

Method 3: Check In the Recipient in the Appointment Tab

Lastly, the **VACCINE ADMINISTRATION** process can begin from the **APPOINTMENTS TAB.**

1. Navigate to the **APPOINTMENTS TAB**
2. Find the **CORRECT APPOINTMENT BOOKING** for the Recipient you would like to begin the Vaccine Administration for
3. Click the drop-down arrow to the right of their name
4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**



Audience

Healthcare Provider

Healthcare Location Manager

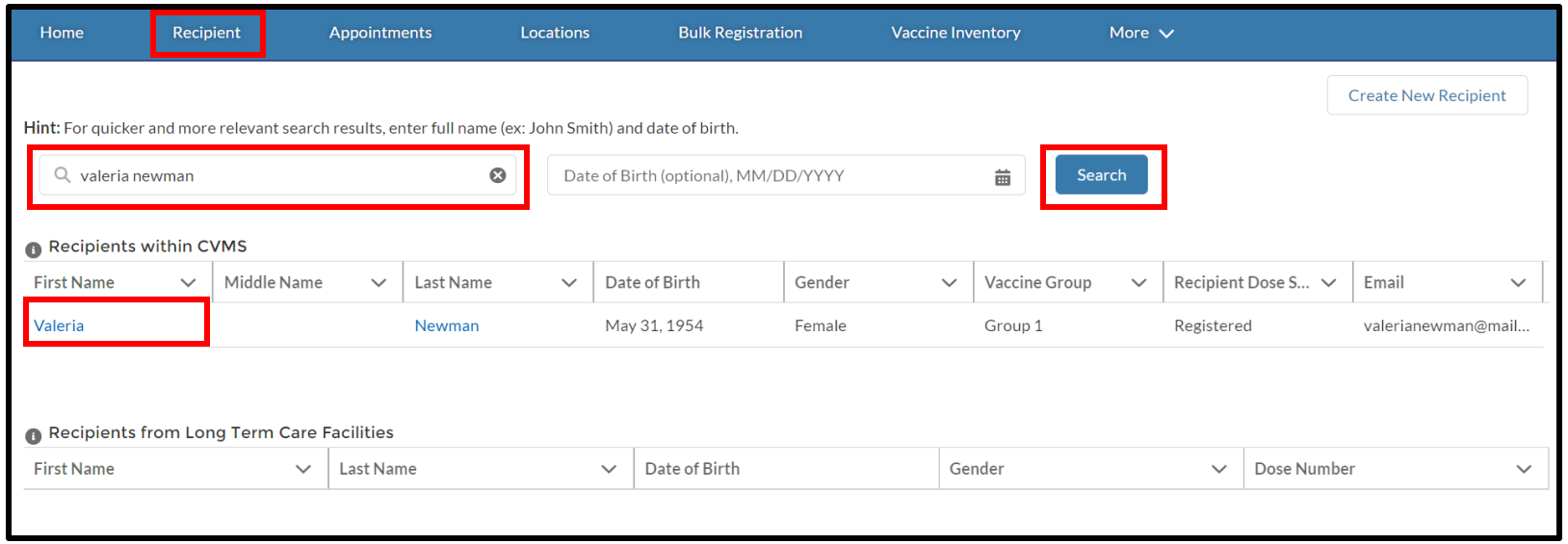
Schedule a First Dose Appointment

Step 1 of 8: Search for the Recipient Record

As a provider, you can schedule a first dose appointment using the scheduling feature in CVMS. To do so, **you must first confirm that the recipient is registered in CVMS**.

Once confirmed, you can begin the scheduling process from the CVMS Provider Portal.

1. To begin, click the **RECIPIENT** tab
2. **SEARCH FOR THE RECIPIENT** with their name and/or date of birth
3. Confirm their Recipient Dose Status is **REGISTERED**
4. If the recipient is registered, **open the recipient record**



Audience

Healthcare Provider

Healthcare Location Manager

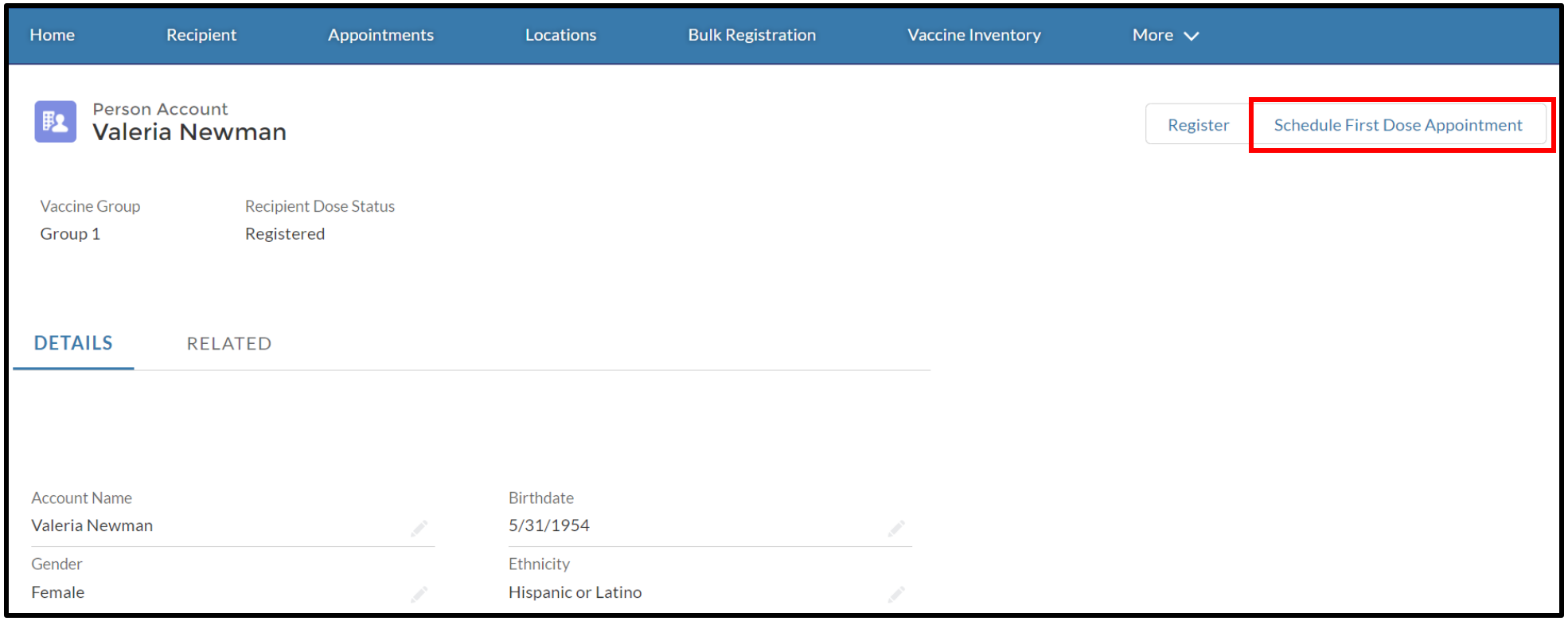
Tips

For guidance on how to confirm if a recipient is registered in CVMS (and how to register them if they are not), please reference the **Recipient Point of Care** section of this user guide.

Step 2 of 8: Begin Scheduling the First Dose Appointment

Once you confirm that you opened the correct Recipient record, make sure that the **recipient's preferred method of contact is up to date**, or the recipient will not receive an appointment confirmation notification.

1. Click the **SCHEDULE FIRST DOSE APPOINTMENT** button in the upper right corner



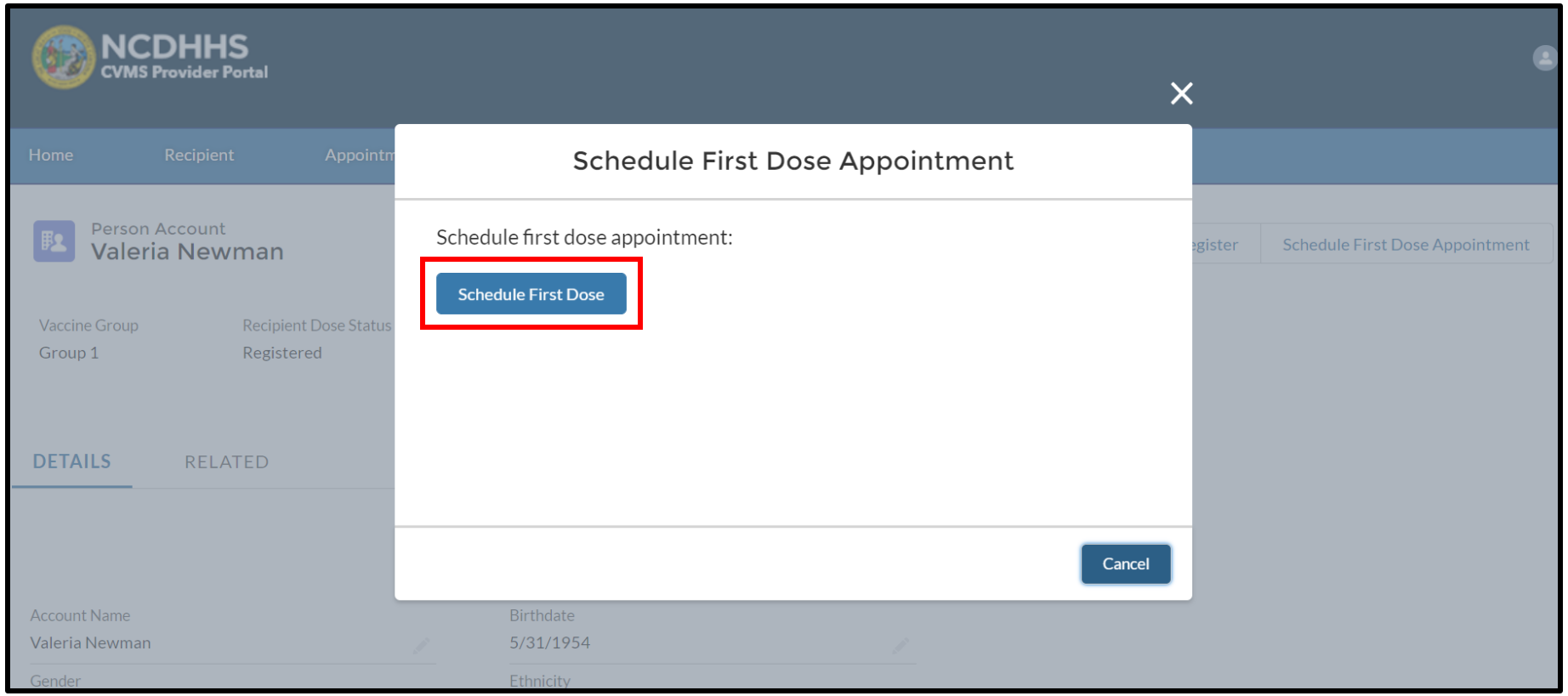
Audience

Healthcare Provider

Healthcare Location Manager

Step 3 of 8: Click Schedule First Dose

Continue into the scheduling feature in CVMS by clicking, **Schedule First Dose**.



Audience

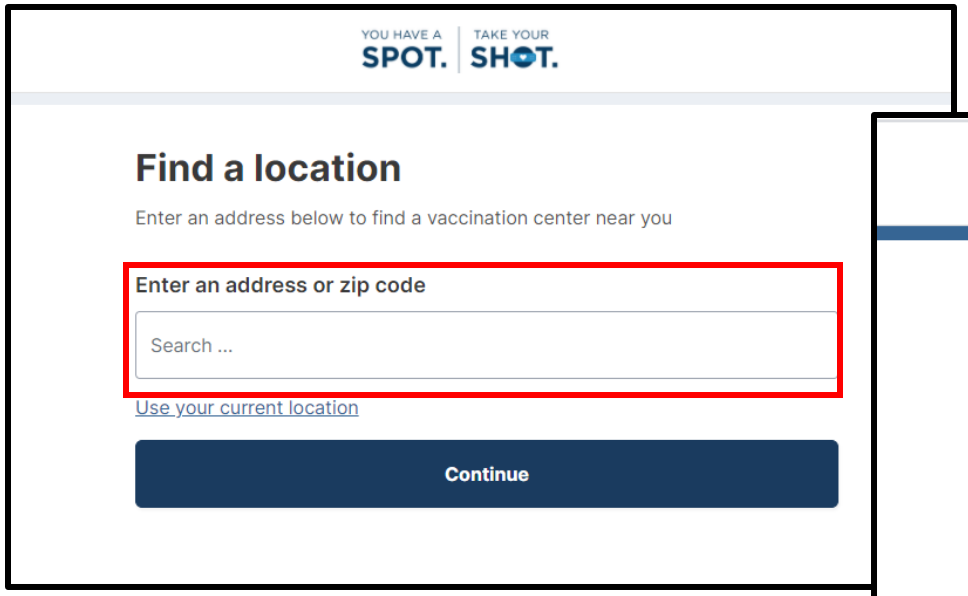
Healthcare Provider

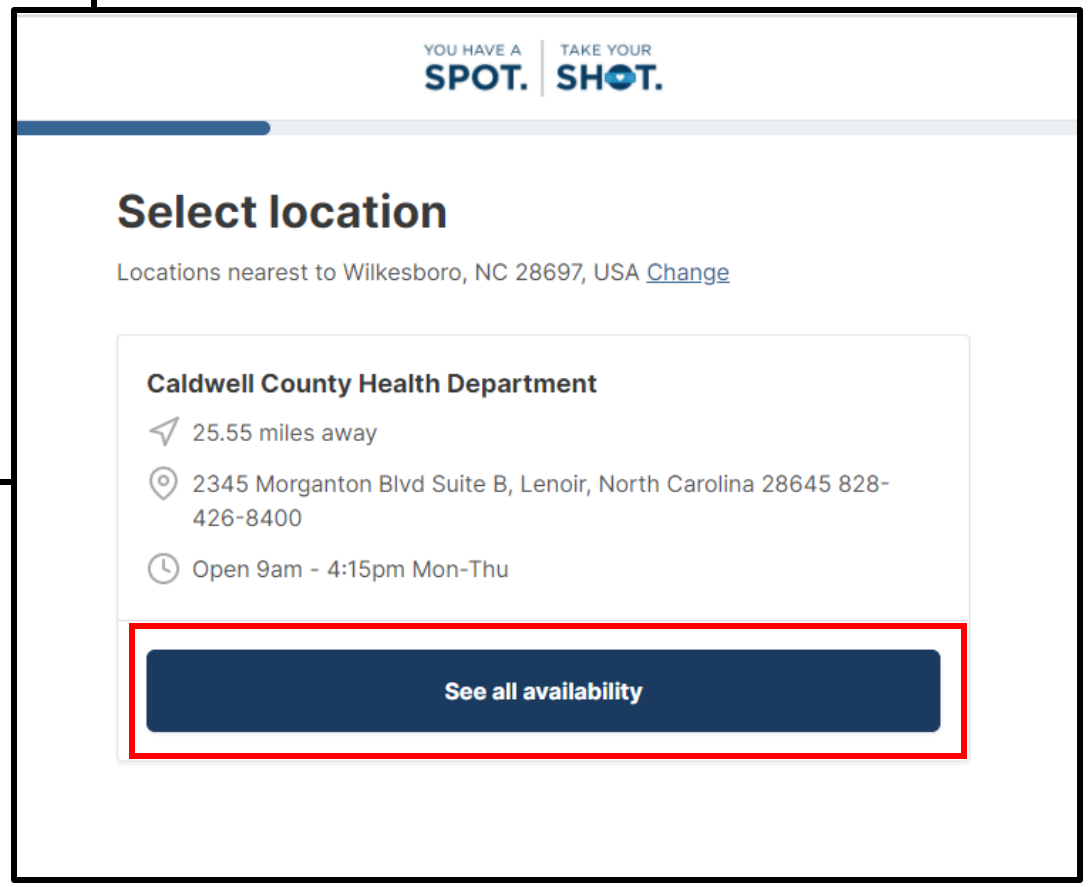
Healthcare Location Manager

Step 4 of 8: Search for Location and click, See Availability

A new tab will open and direct you to select a location.

1. Search using an **ADDRESS OR ZIP CODE**
2. Select a location and click **SEE AVAILIBITY**





Audience

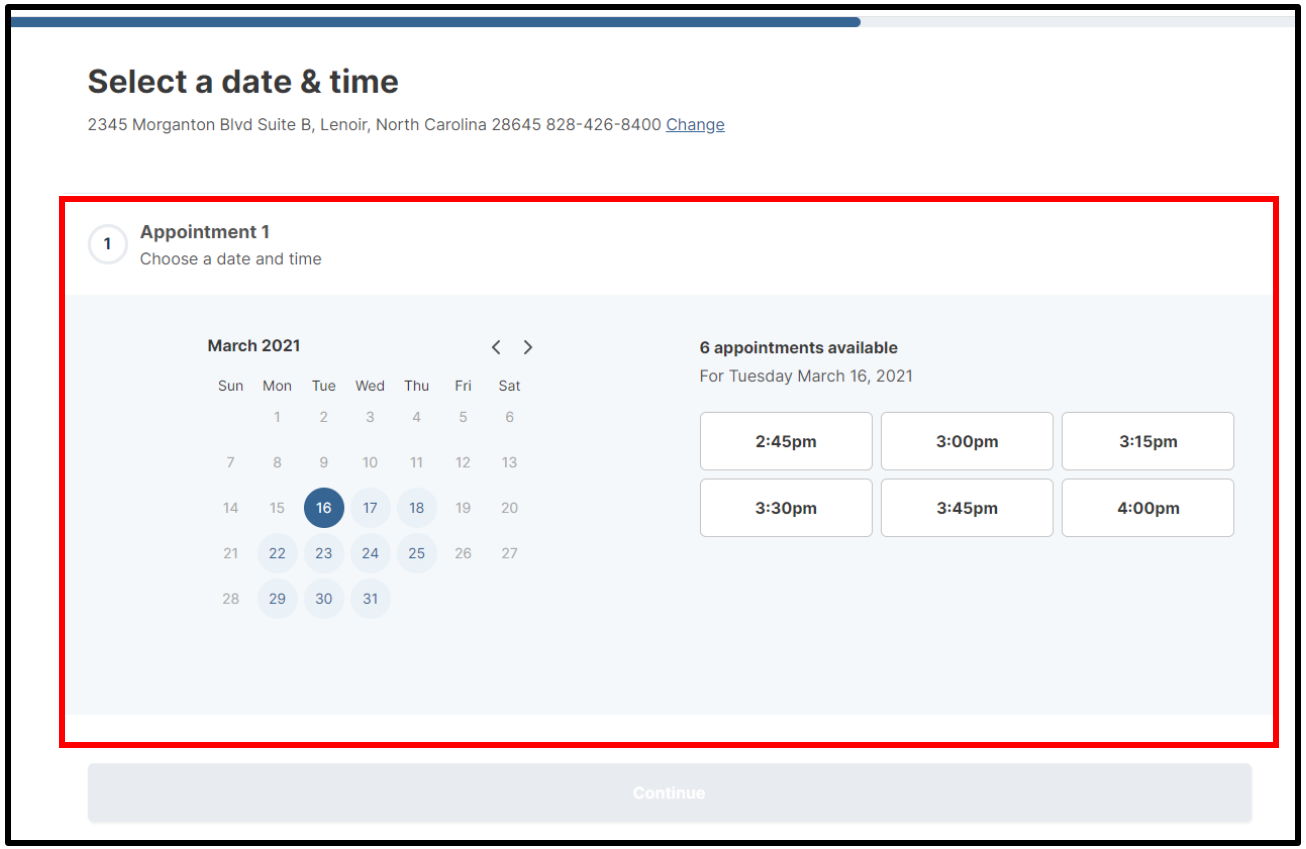
Healthcare Provider

Healthcare Location Manager

Step 5 of 8: Select an Appointment Date and Time

You will be prompted to select a date and time for the selected location. Only days with available appointments will appear enabled on the calendar.

1. Select an **AVAILABLE DATE**
2. Select an **AVAILABLE APPOINTMENT TIME**



Audience

Healthcare Provider

Healthcare Location Manager

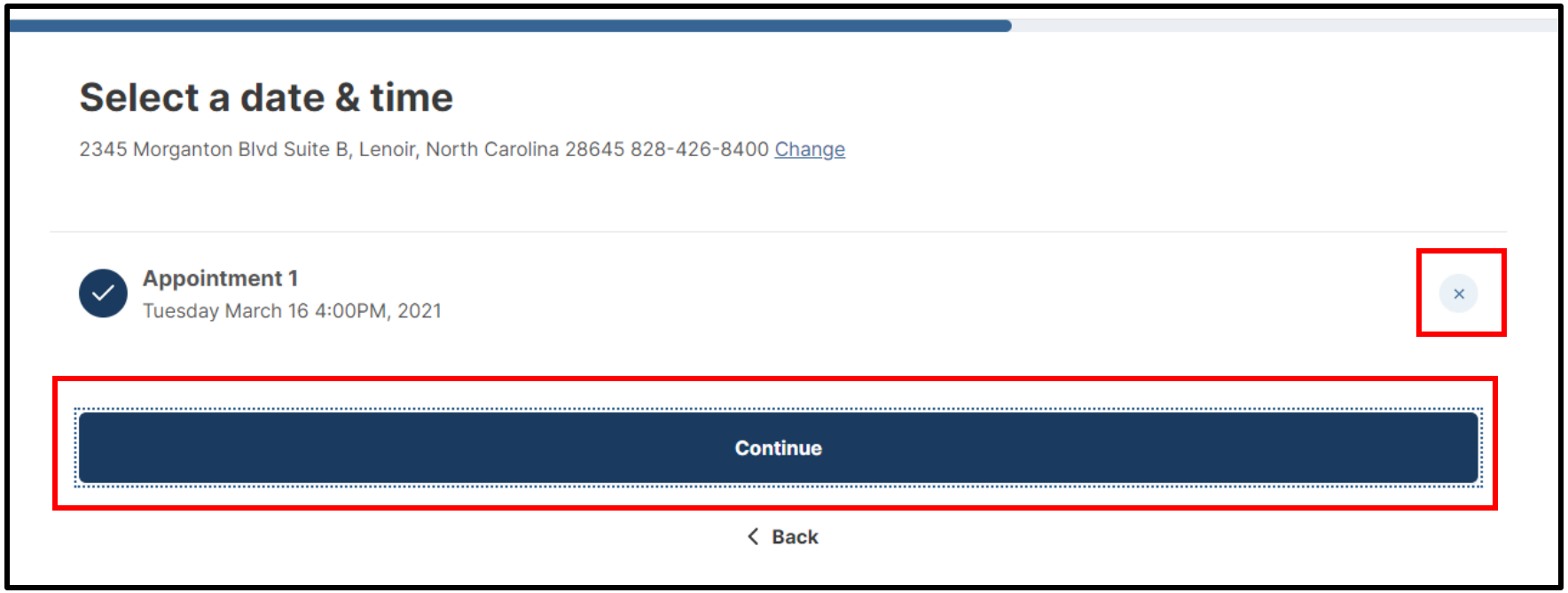
Tips

If you need to change the location of the appointment, click the Change button at the top of the page.

Step 6 of 8: Confirm Appointment Details

Review the appointment details before moving forward. If you need to select a new date and time, you can click the X button to select a new appointment for the same location.

1. Click **CONTINUE**



Audience

Healthcare Provider

Healthcare Location Manager

Tips

If you need to change the location of the appointment, this is the last page where you will be able to do so.

Click the Change button at the top of the page.

Step 7 of 8: Click Complete Appointment

The recipient's details are already saved from their registration.

1. Scroll down, click **COMPLETE APPOINTMENT**

YOU HAVE A SPOT. | TAKE YOUR SHOT.

Please provide the information below

Legal First Name
James

Middle Name (optional)

Legal Last Name
Harden

Address
123 Test Dr

City
Raleigh

County
Wake

State
North Carolina

Zip Code
27609

Best way to contact you (Email will allow you to access your vaccine information in the COVID-19 Vaccine Portal.)

- [x] Email
- [ ] SMS/Text
- [ ] Both
- [ ] None

Date of Birth

Month	Day	Year
1	1	1980

Race
Native Hawaiian or Other Pacific Islander

Ethnicity

- [ ] Hispanic or Latino
- [x] Not Hispanic or Latino
- [ ] Unknown
- [ ] Declined to State

Gender

- [ ] Female
- [x] Male
- [ ] Decline to Specify
- [ ] Other
- [ ] Unknown

Complete Appointment

< Back

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

Audience

Healthcare Provider

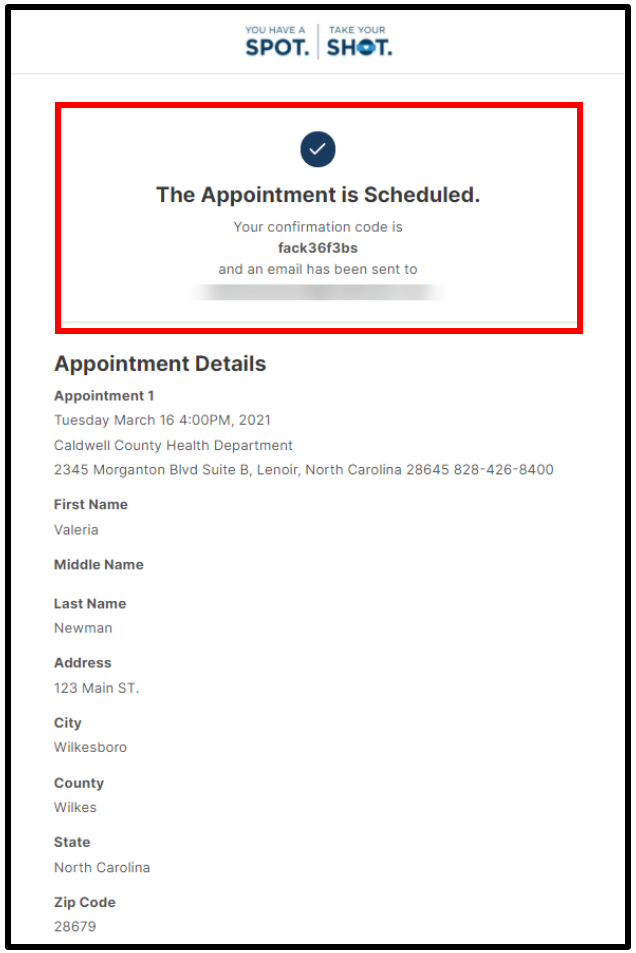
Healthcare Location Manager

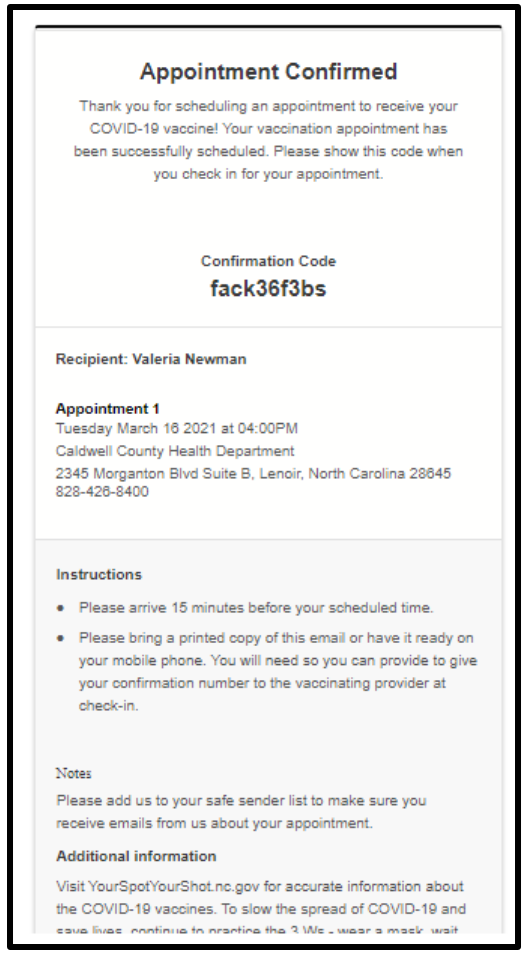
NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 8 of 8: Review Appointment Confirmation

Once the appointment is complete, the recipient will receive an appointment confirmation via email and / or text/SMS if they provided contact information. It is important that the recipient note their appointment confirmation code and details if they did not provide a preferred method of contact.

1. Review the **APPOINTMENT CONFIRMATION** details





Audience

Healthcare Provider

Healthcare Location Manager

Tips

Recipients will receive an appointment confirmation to the email address and / or phone number provided with their confirmation code and instructions (screenshot on the right).

If they did not select a preferred method of contact, they should make note of their appointment details.

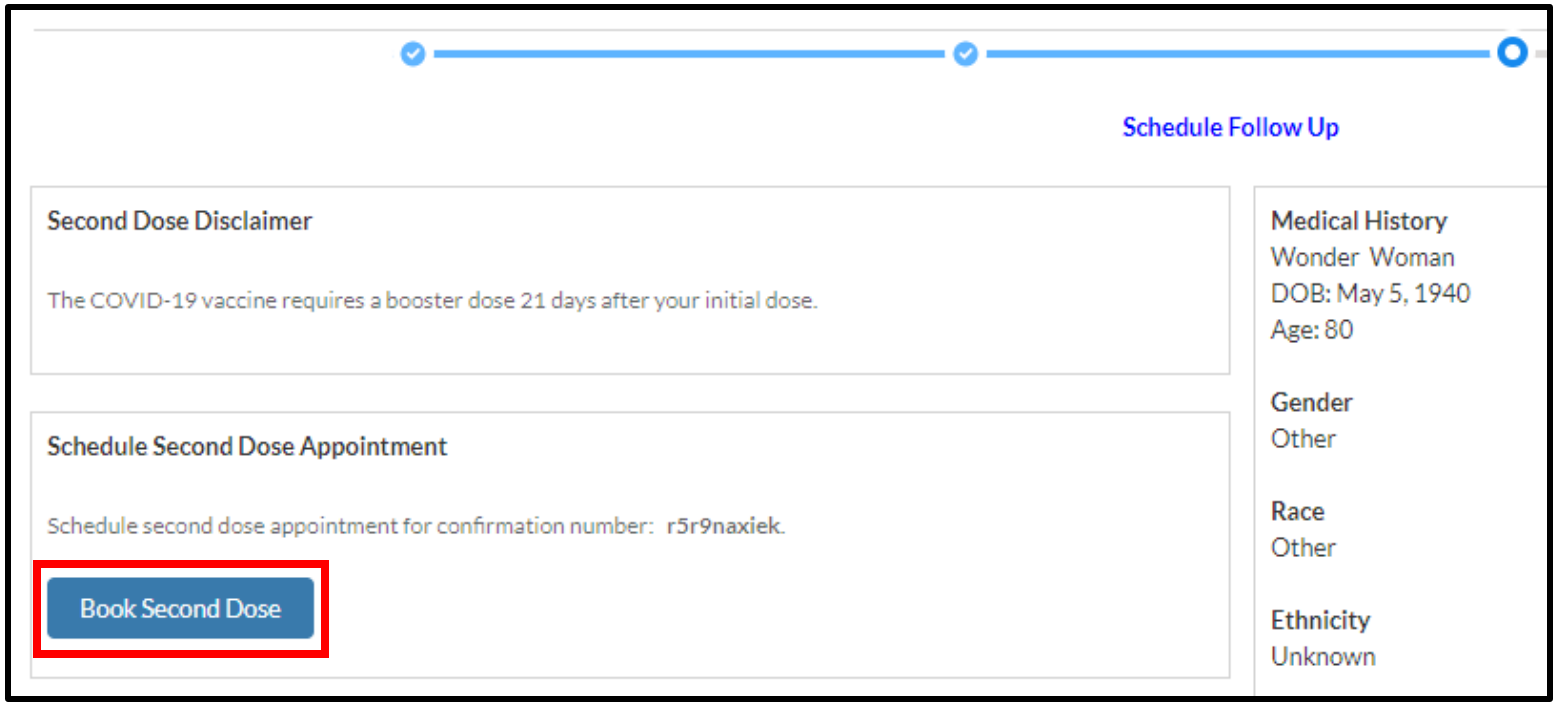
Schedule a Second Dose Appointment

Method 1 - Step 1 of 3: Book Second Dose at Time of First Dose Administration

If a **RECIPIENT** used the scheduling feature in CVMS to book their first appointment and received a vaccine product that requires a second dose, the final page of the **VACCINE ADMINISTRATION** process will display a button labeled **BOOK SECOND DOSE**.

Second dose appointments use the same **AVAILABILITY SCHEDULE** as first dose appointments.

1. To begin, click the **BOOK SECOND DOSE** button



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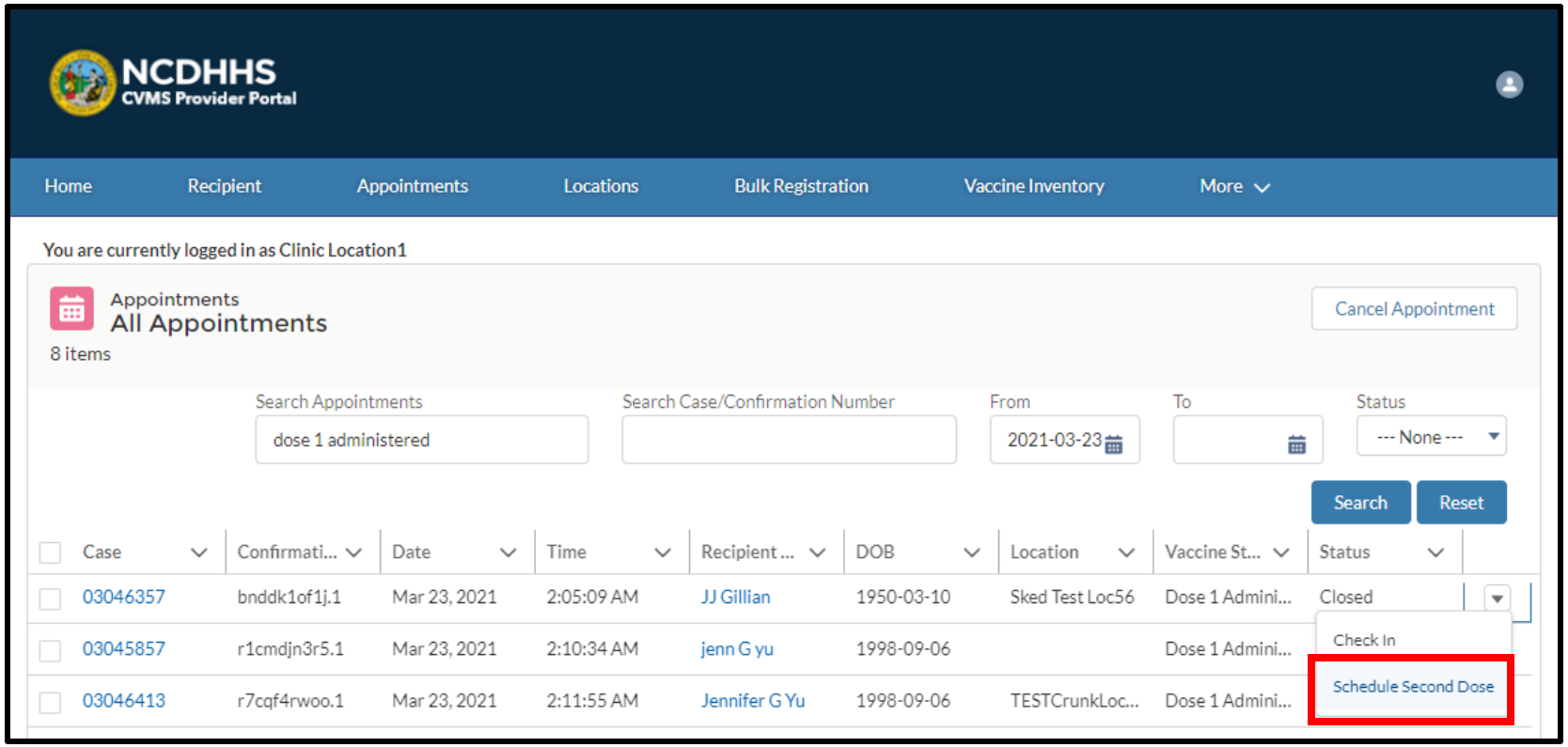
Tips

Healthcare Providers will only see this option for recipients who booked their first dose appointment through the scheduling feature in CVMS.

Method 2 - Step 1 of 3: Book Second Dose After First Dose Administration

You may choose to book a second dose appointment after first dose vaccine administration.

1. To begin, navigate to the **LOCATIONS** tab
2. Find the **DOSE 1 ADMINISTERED** appointment
3. Open the menu and click **SCHEDULE SECOND DOSE**



Audience

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Tips

Schedule the **SECOND DOSE APPOINTMENT** while the recipient is on-site to confirm that you have availability at the planned appointment time.

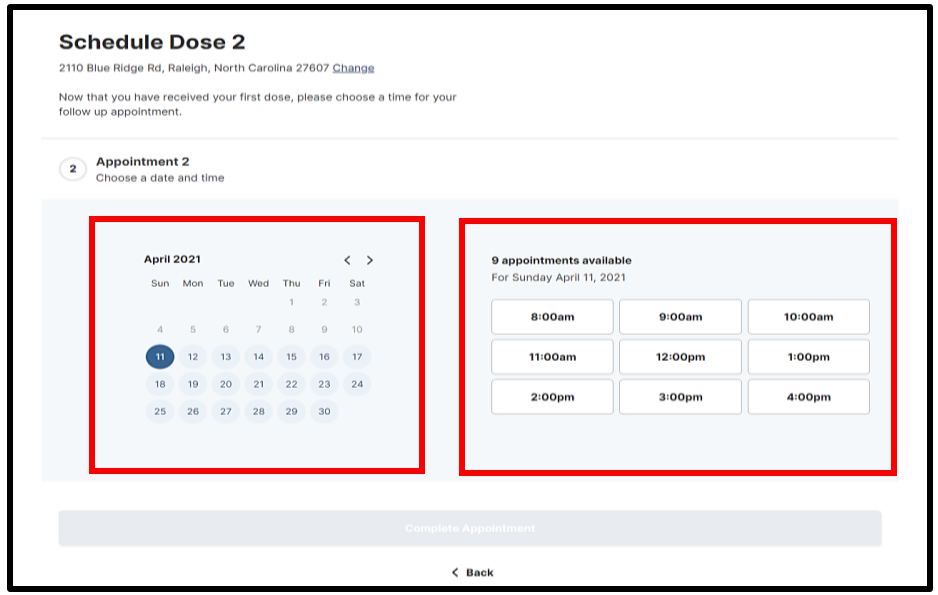
Step 2 of 3: Select a Date and Time

The scheduling feature in CVMS will appear in a new tab and will **default to the same location as the first dose** appointment. If the recipient needs to change the location, the new provider location must book the appointment for the recipient.

1. **Select a date** for the second dose

***NOTE**: The first available date for a second dose is based upon the product the recipient received for their first dose (21 days or 28 days). For example, if a recipient was vaccinated with Pfizer with a recommended 21-day interval for their second dose, the earliest possible appointment for their second dose would be 21 days after their first dose. However, the recipient should be scheduled as close to the recommended interval as possible.*

2. **Select an available time slot** for the second dose



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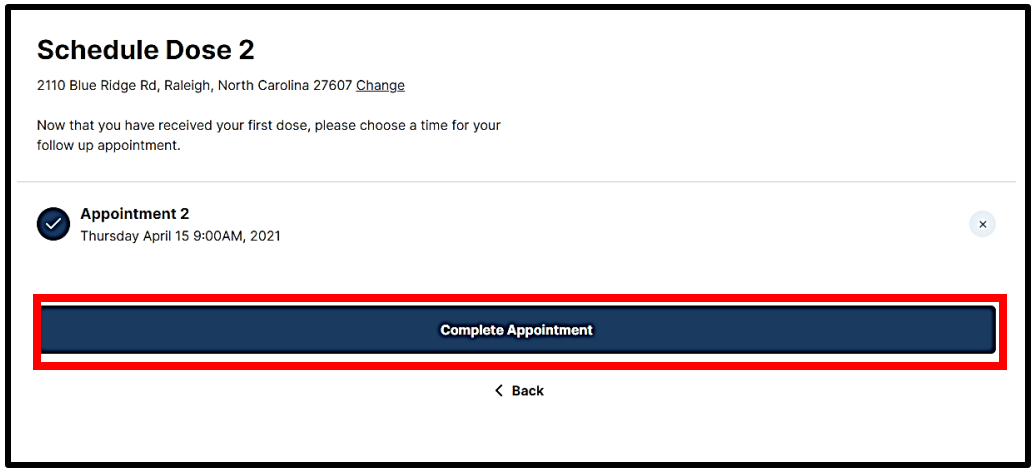
Tips

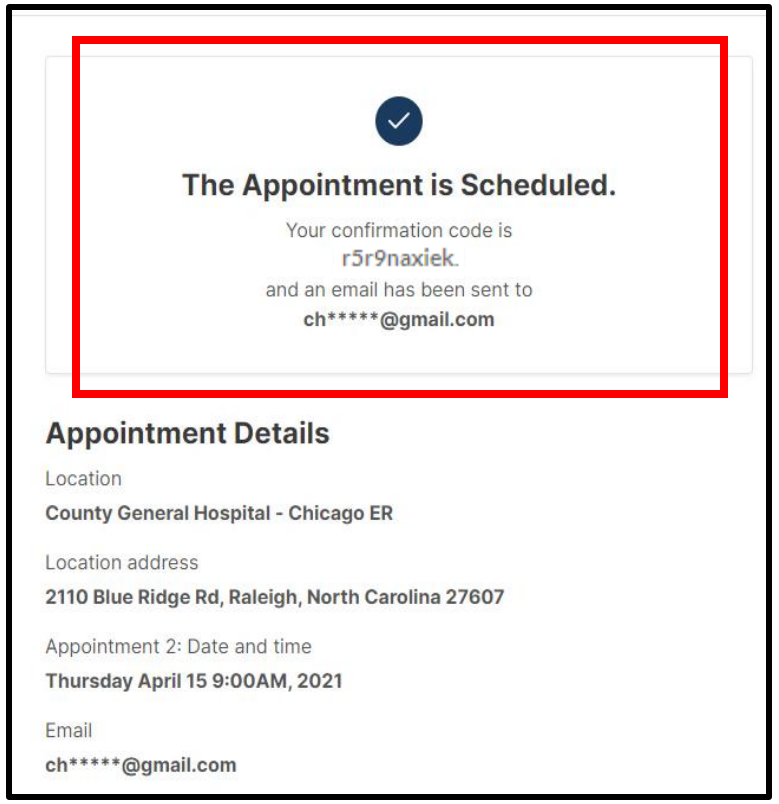
You will not be able to schedule an appointment too early. The scheduling feature in CVMS will show you the correct timeline for the vaccine your recipient received.

Step 3 of 3: Confirm Appointment

Now, you will complete the 2nd dose appointment booking.

1. Click **COMPLETE APPOINTMENT**
2. Review the details of the scheduled appointment
3. The recipient will only receive a reminder notification if they provided an email and/or phone number and agreed to reminders when they scheduled their 1st dose appointment





Audience

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Tips

You will not be able to change the location of the appointment through the appointment confirmation email.

You must cancel the appointment and the new location must schedule the appointment for the recipient.

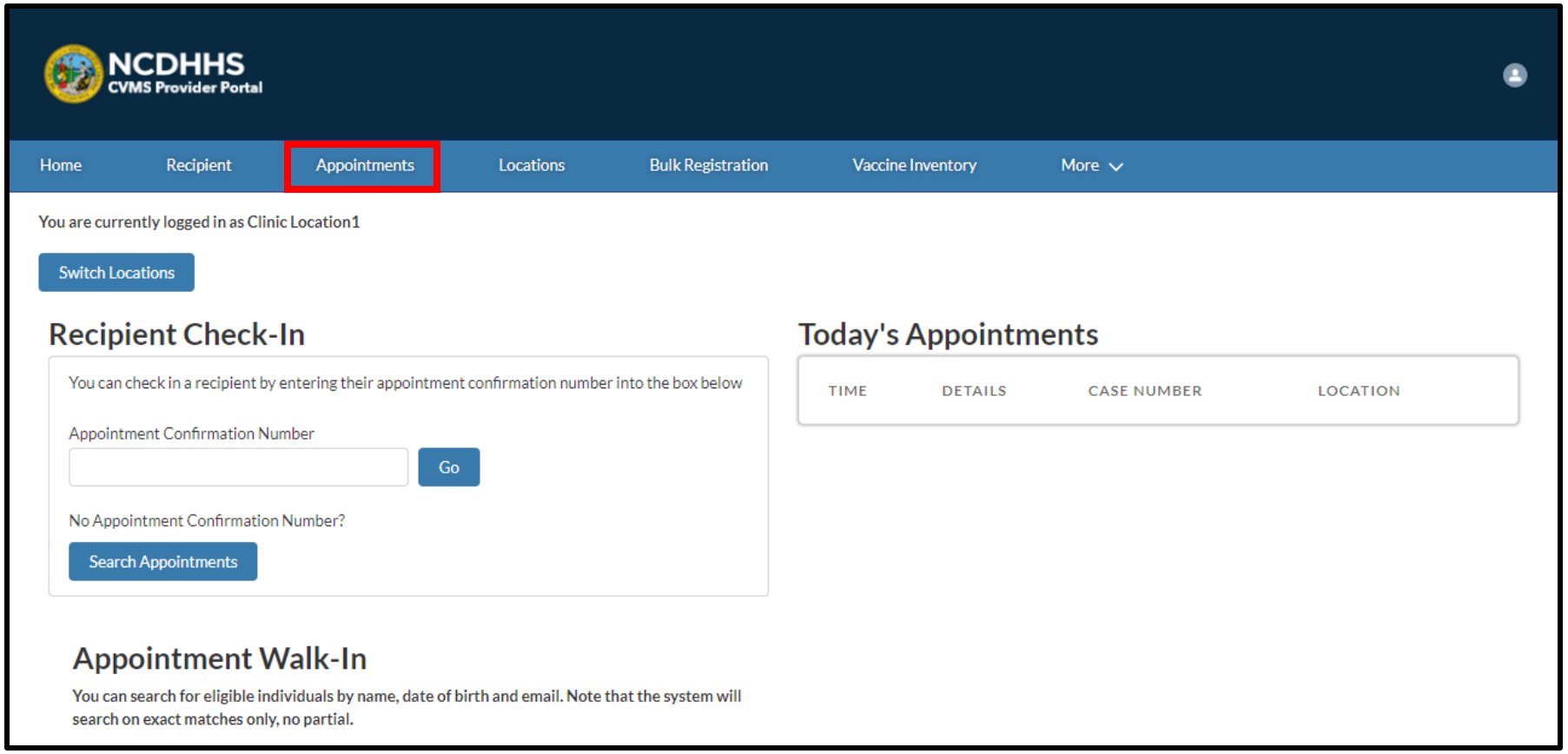
The confirmation code for the 2nd dose appointment is the same as the confirmation code for the 1st dose appointment.

Search Scheduled Appointments

Step 1 of 5: Navigate to Appointments Tab

Periodically, you may want to verify how many appointments have been scheduled for a specific day or period. Searching for upcoming appointments can be done from the Appointments Tab.

1. To begin, navigate to the **APPOINTMENTS** tab.



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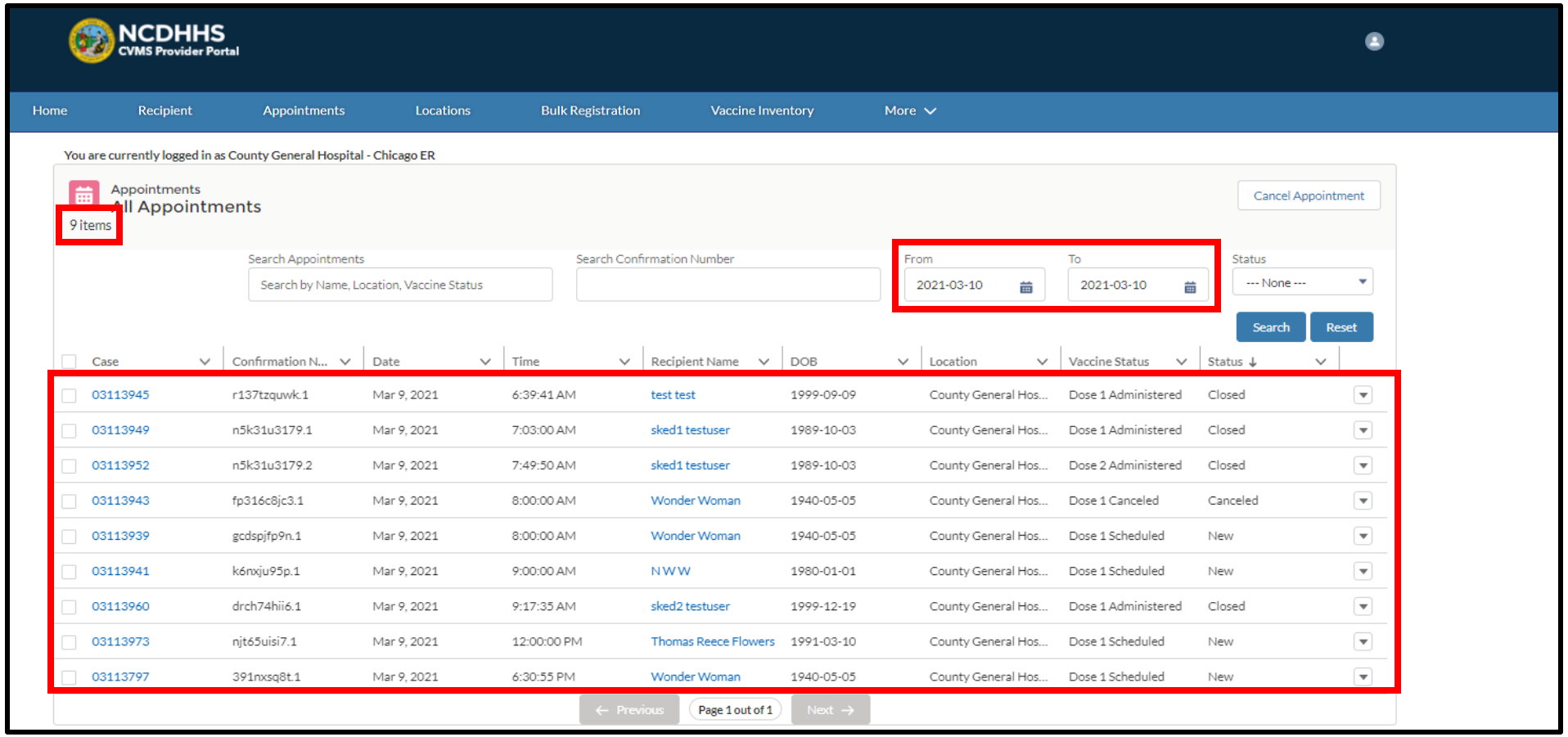
Step 2 of 5: Review and Plan Appointments for the Day

You will first need to enter a date range.

1. Enter the specific dates in the two fields **FROM** and **TO**
2. Click **SEARCH**



Audience

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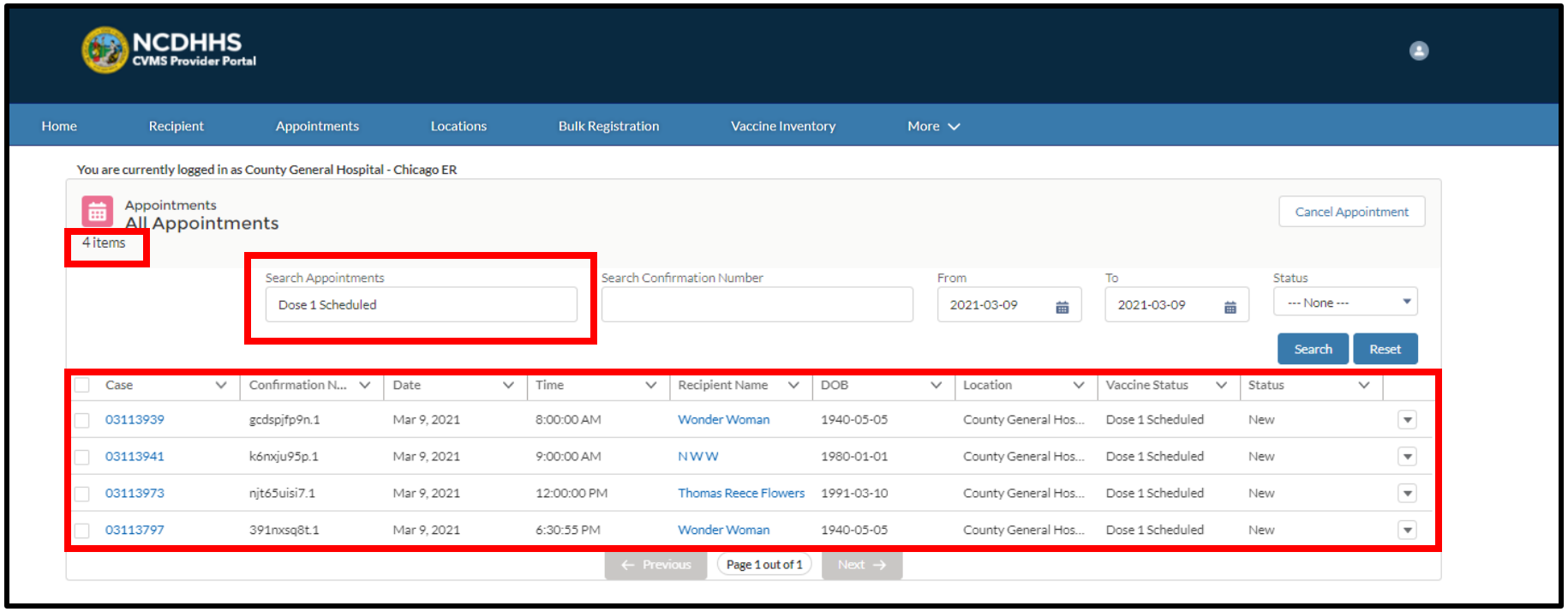
Tips

The number of appointments will show at the top left of the page.

Step 3 of 5: Search by Name, Location, or Vaccine Status

In the **SEARCH APPOINTMENT** field, you can search including recipient name, location name, or vaccine status. If multiple locations are available, you can enter the location name. Vaccine statuses include **DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) SCHEDULED, or DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) ADMINISTERED**.

1. Enter the keyword in the **SEARCH APPOINTMENTS** field
2. Click **SEARCH**
3. Click **RESET** to restore the standard view



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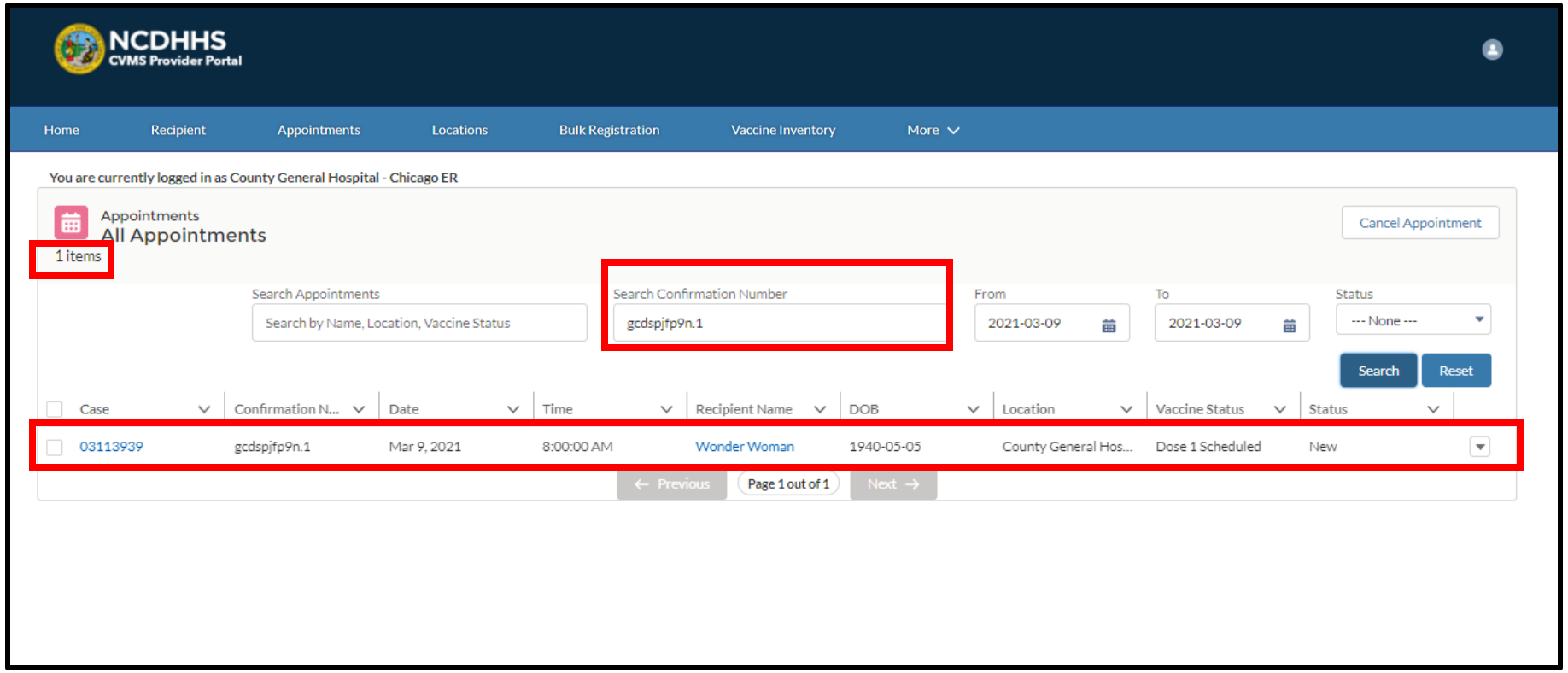
Step 4 of 5: Search by Using Recipient's Confirmation Number

For locations that enable the scheduling feature in CVMS, **recipients that book an appointment will be sent a unique confirmation code for their appointment**. You can search for a specific recipient's appointment using this confirmation code.

1. Enter the confirmation code in the field labeled **SEACH CONFIRMATION NUMBER** field
2. Click **SEARCH**



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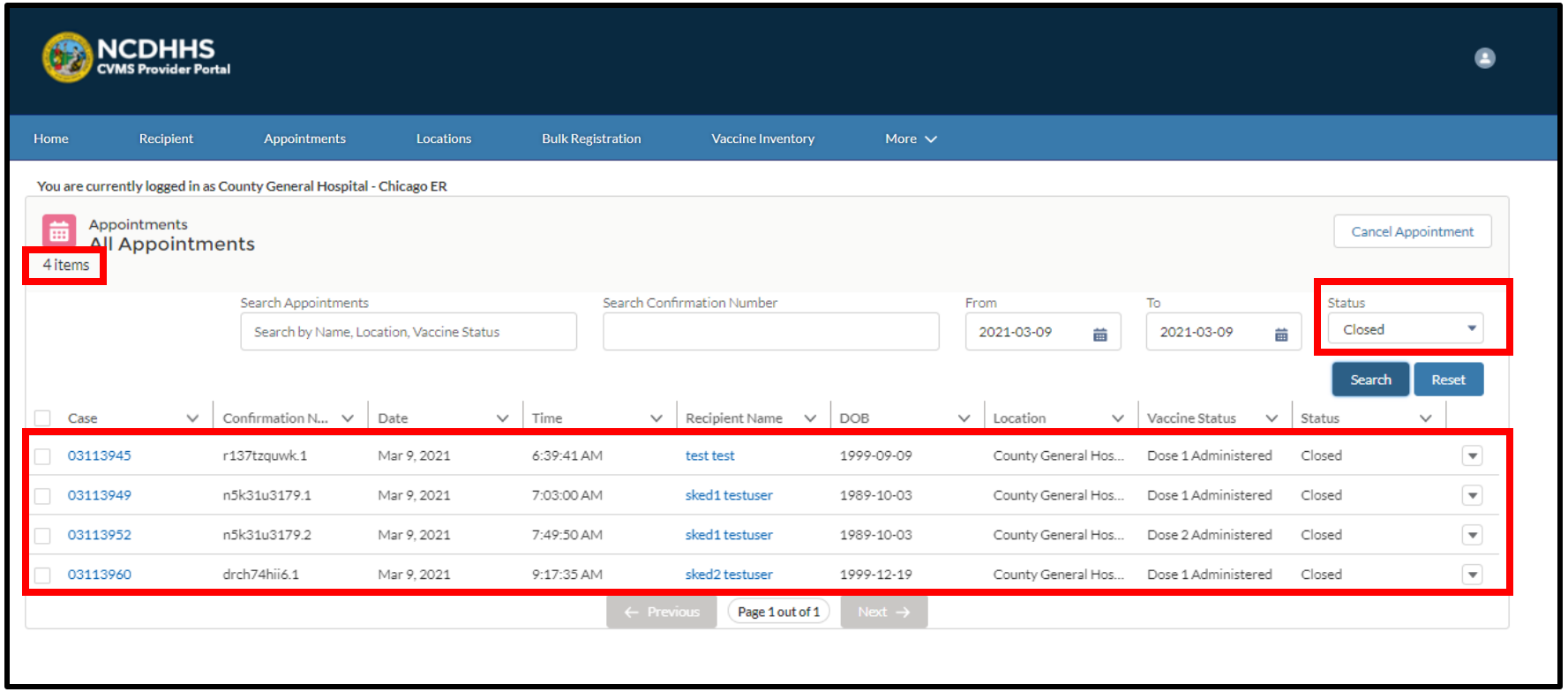
Step 5 of 5: Search by Appointment Status

Another helpful view is Appointment Status over to the right. Options include:

- New – recipients with an upcoming appointments
- Closed – scheduled recipients that completed their appointment
- Canceled – appointment canceled either by the recipient or by the provider

1. Select STATUS
2. Click **SEARCH**



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Tips

Search using the **NEW** status filter to quickly see which appointments were booked overnight.

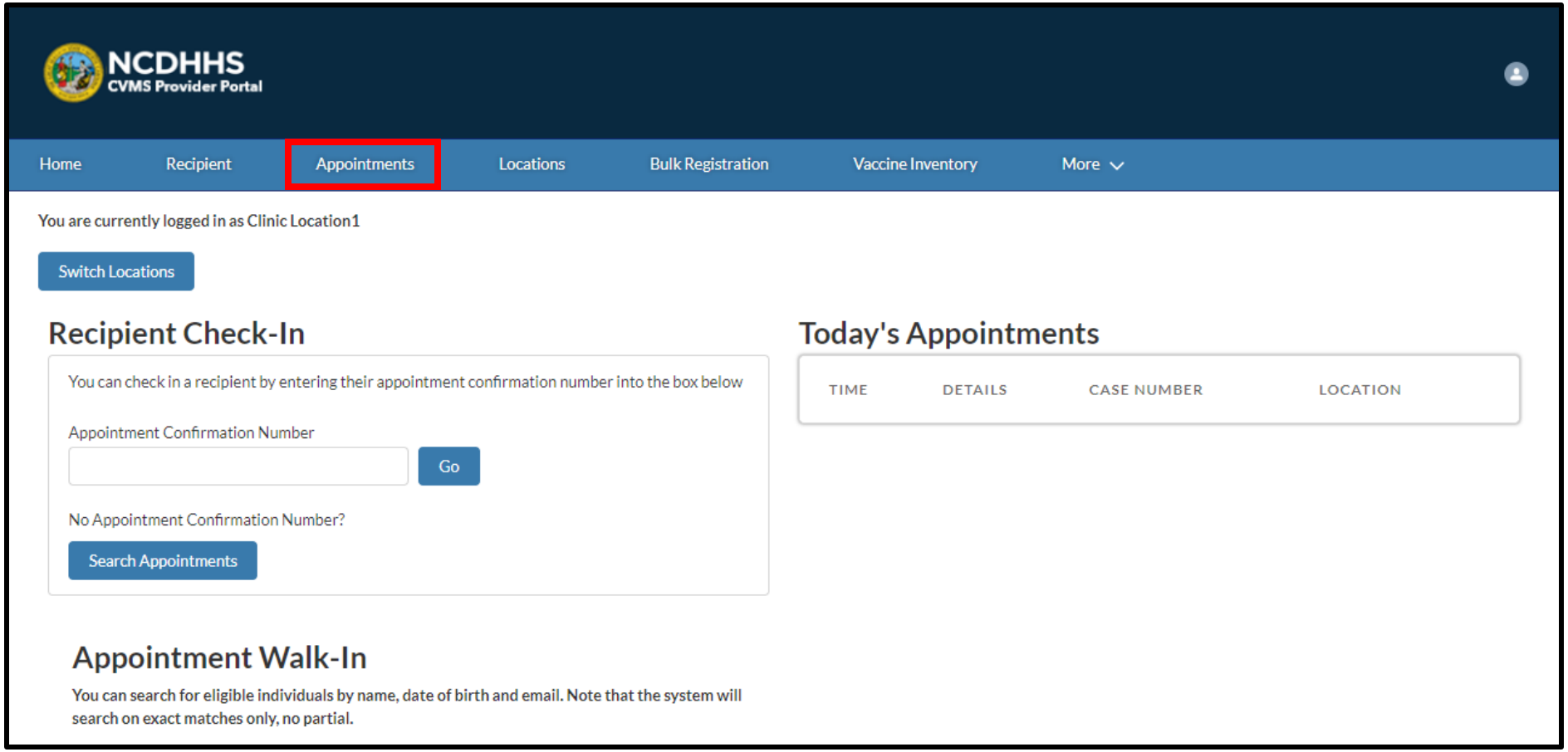
Recipients can cancel their appointment in CVMS directly through a link included in the confirmation email or the text message.

Cancel Scheduled Appointments

Step 1 of 5: Navigate to Appointments Tab

If a scheduled appointment needs to be cancelled, you can cancel it and notify the recipient of the reason for cancellation.

To begin, navigate to the **APPOINTMENTS** tab.



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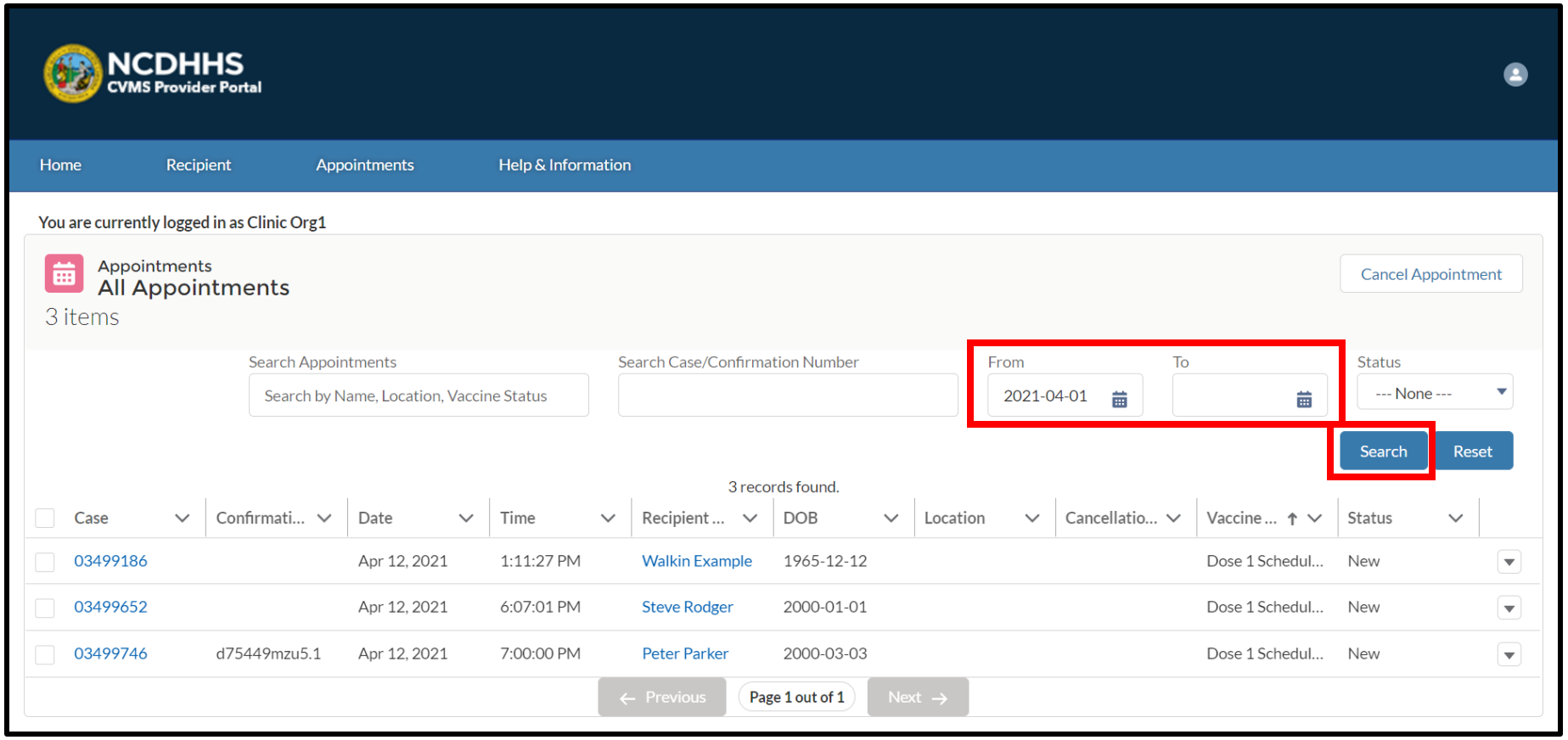
Step 2 of 5: Search for the Recipient by Name, Appointment Date, Confirmation Code, and/or Vaccine Status

You will first need to find the appointment you wish to cancel. You can search using the recipient's name or confirmation code as well as filter by the date and/or status.

1. Search for the appointment(s) you need to cancel



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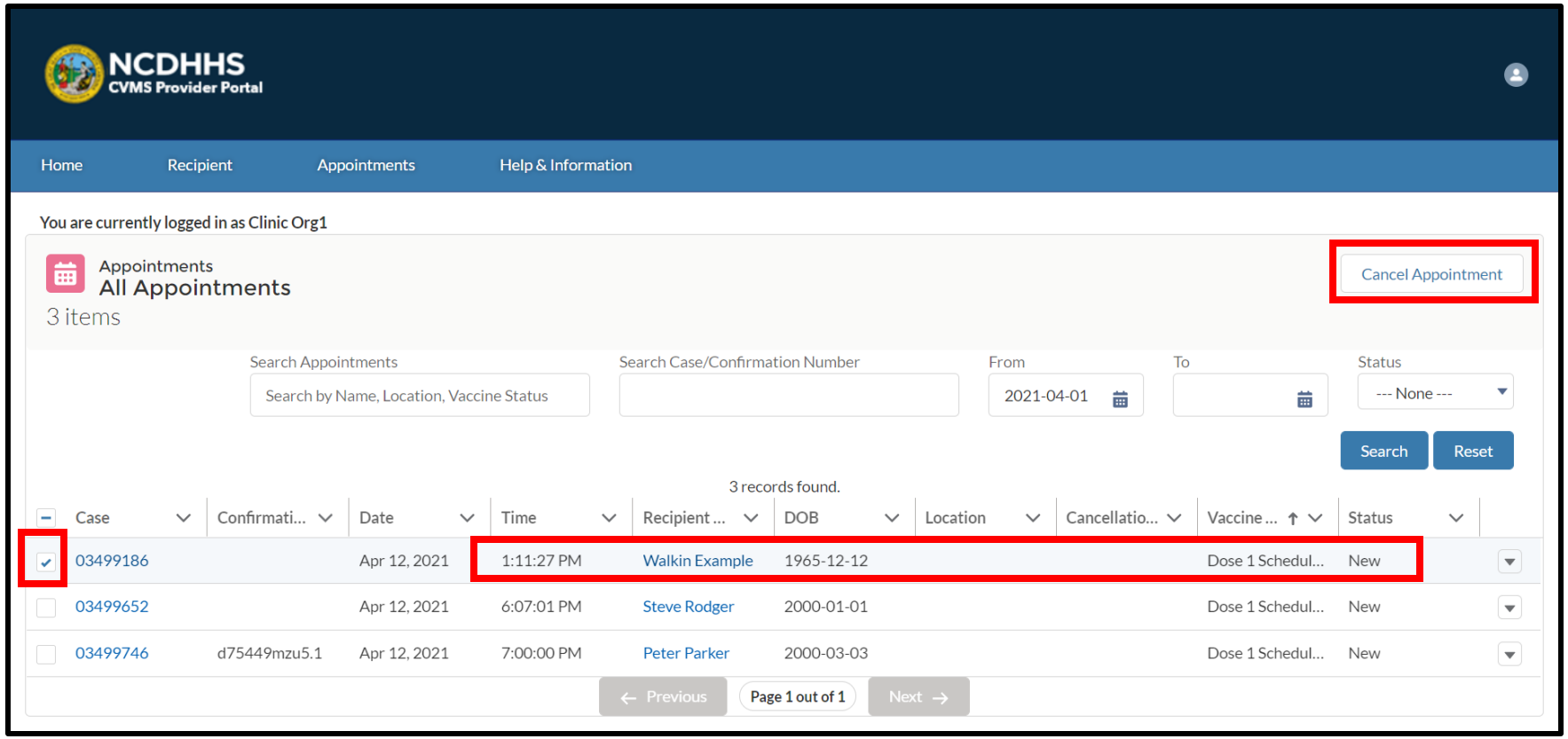
Step 3 of 5: Cancel Up to 20 Appointments

You can cancel up to 20 appointments at a time.

1. Click the checkbox at left of the appointments you wish to cancel (up to 20)
2. Click the **CANCEL APPOINTMENT** button in the upper right.



Audience

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Tips

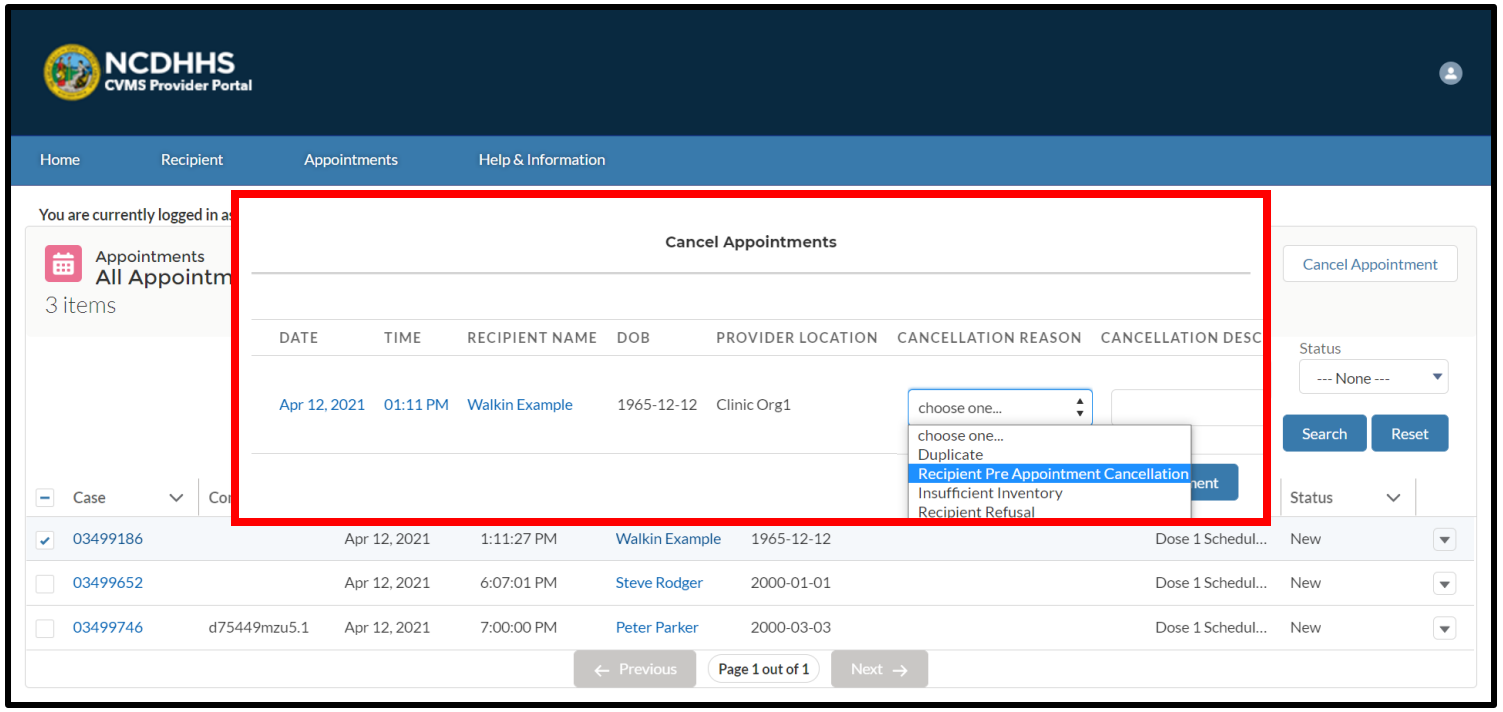
The ability to cancel 20 appointments at a time can be particularly helpful if you have a capacity issue and need to quickly cancel some appointments for the day that cannot be reassigned.

Step 4 of 5: Provide Cancellation Reason and Cancel Appointment

If the appointment was made through the scheduling feature in CVMS *and* the Recipient opted "in" for receiving text and/or email notifications, they will be notified of the cancellation.

1. Input a reason for cancelling the appointment(s) from the drop-down menu (you may optionally add a cancellation description in the free text field)
2. Click the **CANCEL APPOINTMENT** button to confirm the cancellation

***Note**: If the recipient did not sign up for text and/or email notifications as their preferred method of contact, they will not know that the appointment has been cancelled.*



Audience

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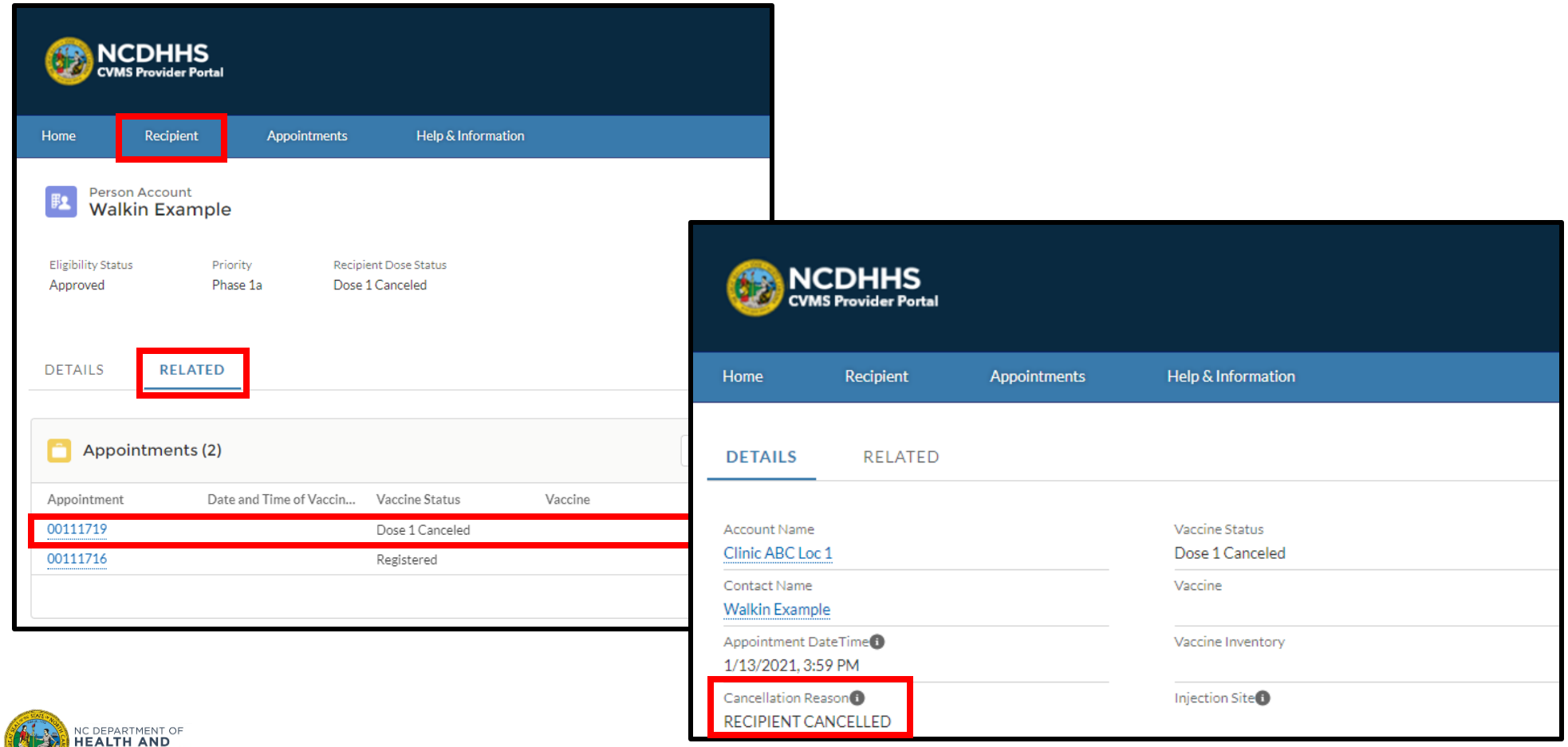
Tips

You may want to follow up with a call to the recipient even if they have signed up to receive notifications just to make sure they saw the cancellation.

Step 5 of 5: View Appointment / Cancellation History

To view a record of a Recipient's appointment history, navigate to the Recipient tab, locate the Recipient's record, and select **RELATED** tab. The Recipient's appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.



Audience

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Tips

You may need to reschedule the appointment if the recipient has not already received their vaccination. **If they did *not* sign up for the text and/or email notifications, they will not receive a booking confirmation.**

Automatic Cancellations

There are a few scenarios that may result in an automatic cancellation:

1. If a Recipient appears in **TODAY'S APPOINTMENTS** (either through the Appointment Walk-In process or due to a scheduled appointment) but does not complete their appointment within 72 hours, the appointment will be **AUTOMATICALLY** cancelled, and their Dose Status will update to **DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) CANCELLED.**

2. If a Recipient creates multiple appointments (for example at different locations in hopes of being vaccinated as quickly as possible), all the remaining appointments will be automatically cancelled as soon as one of the appointments is changed to an **ADMINISTERED** status.

3. Providers using CVMS Direct (Electronic Health Record system integration with CVMS) may also notice cancelled appointments appearing in the system. Those appointments are created during the integration process and will be automatically cancelled and marked as **DUPLICATE** as they are a replica of the scheduled appointment.

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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 information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not compatible with CVMS.

User Guide Change Log (1 on 3)

Version	Date of Change	Changes Made	Author
1	12/1/2020	• Initial document	Azalea Troche
2	12/18/2020	• Added Create Recipient, Register Recipient sections, updated Process Flow, added Generic Employer List, eligibility criteria • Added Patient Verification and Screening page, Removed mention of Adverse Reaction Annotation, clarified On Behalf Of (Clinician), added Schedule Follow-up Page • Updated Process for recipients that are not Eligible yet / Not Approved	Steve DiGangi
3	1/15/2021	• Updated instructions for Creating Recipient • Updated Screenshots • Updated instructions for Appointment Booking (select a location) • Updated Understanding How Recipient Eligibility Status is Determined Section • Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information • Added "What to do if a Recipient received their first dose through a LTC/Pharmacy" section • Added Cancelling an Existing Appointment Section • Updated screenshots to include updated branding, Appointments tab, Second Dose warning label, and new Vaccine Route • Included information about recipients who may receive a first dose outside of CVMS	Steve DiGangi Courtney Seward
4	1/26/2021	• Added in Updated Priority Group Tiering Logic • Corrected Priority Tiering Screenshots • Added screenshots to include Location Switcher button • Added Location Switcher button explanation section • Added new section: Edit Vaccine Administration Details After Submission • Added new section: Edit Vaccine Administration Recipient	Steve DiGangi
5	2/9/2021	• Added new section on Editing Recipient Registration Information • Updated section titles in TOC	Steve DiGangi
6	3/4/2021	• Added information about single-dose products • Updated eligibility branding to Vaccine Group • Removed priority tiering logic and eligibility visibility • Removed eligibility branding to replace with Vaccine Group • Updated screenshots to correct branding (DOB & Middle name fields, vaccine group)	Steve DiGangi

User Guide Change Log (2 on 3)

Version	Date of Change	Changes Made	Author
7	3/10/2021	• Updated Overview slide • Updated branding to include Recipient Check-In tool • Updated Cancelling an Existing Appointment section • Added Appointment Confirmation Number usage • Added Book Second Dose Appointment section • Created new section to cover scheduled appointments	Steve DiGangi
8	4/16/2021	• Removed explanations on 2nd dose appointment cancellations • Removed Eligibility definition • Updated branding to remove Vaccine Group and add date/product of vaccination • Added search by email address in Recipient tab • Added Cancellation changes for 24-hour automatic cancel after a no-show, automatic cancellation if there are duplicate appointments, and cancel reason picklist • Added new section on marking recipient deceased • Removed slide concerning inactive Vaccine Groups • Updated Cancellation branding with picklist • Removed guidance to enter recipient demographic information from 1st dose appointment booking	Steve DiGangi
9	5/05/2021	• Updated branding to change "Long term care/federal pharmacy programs" fields • Added Generate PDF button	Kaitlin Gates
10	5/16/2021	• Updated Cancel Appointment section to show if an appointment was cancelled automatically • Added updated QR code to PDF	Steve DiGangi
11	6/13/2021	• Updated screenshot of registration form • Updated auto-cancellation rule to reflect 72-hour cancellation after no-show appointments	Steve DiGangi
12	6/30/2021	• Added Address Line 2 field • Updated branding of screenshots • Added Remove Vaccine Administration section • Added note about being unable to blank-out information on a vaccine administration in an effort to remove the record	Steve DiGangi

User Guide Change Log (3 on 3)

Version	Date of Change	Changes Made	Author
13	07/30/2021	• Consolidated user guides and updated links • Rewrote user guide overview • Added ability to book, administer, cancel, and view 3rd doses (known as Additional Dose on the Vaccine Administration page) • Added information on logging Dose 1 administration after Dose 2 has already been logged • Removed 'Proof of Vaccination' tab as Vaccine Information PDF is now used • Added section on Report Vaccine Information	Steve DiGangi
14	08/17/2021	• Added new CDC guidance regarding additional doses	Steve DiGangi
15	8/26/2021	• Updated reason for Vaccine Administration removal	Steve DiGangi
16	9/10/2021	• Updated Appointment Walk-in DOB Format • New consent language for Vaccine Administrations • Updated language for FDA-Approved Pfizer vaccine • Updated Vaccination Log Screenshots and explanation • Revised guidance on Additional Doses up to 6 total administrations	Steve DiGangi
17	9/20/2021	• 16, 18, 54-55, 61, 81, 87, 90-91, 93, 100, 133, 143: Updated guidance and screenshots for Additional Dose / Booster • 2: Help Desk Hours Updated	Steve DiGangi
18	10/20/2021	• 92, 93 – Added to reflect new J&J and Moderna Additional Dose/Booster updates	Darrell Lee