

# NC COVID-19 RESPONSE: NCIR Provider Enrollment

This roadmap serves as a guide for new COVID-19 vaccine providers on how to enroll in the COVID-19 Vaccination Provider Program and use the North Carolina Immunization Registry (NCIR) to report and manage COVID-19 vaccine administration.

## New NCIR Providers

Thank you for your willingness to help keep North Carolinians safe and healthy from COVID-19!

Before getting started in NCIR, someone from your organization should:

- [Attend an NCIR training](#) and [review NCIR training materials](#)
- [Review the COVID-19 Vaccine Provider Toolkit](#)

*Do not begin reporting COVID-19 vaccine administrations in NCIR until you have received a final email communication stating that your site is ready to begin using NCIR for COVID-19 vaccine management.*

## Existing NCIR Providers

Thank you for your continued commitment to keeping North Carolinians safe and healthy!

Existing providers in NCIR who are planning to register as a COVID-19 Provider will be able to add COVID-19 vaccine management to their existing workflows in NCIR.

*Do not begin reporting COVID-19 vaccine administrations in NCIR until you have received a final email communication stating that your site is ready to begin using NCIR for COVID-19 vaccine management.*

## North Carolina Immunization Registry (NCIR)

The North Carolina Immunization Registry (NCIR) is a secure, web-based clinical tool which is the official source for North Carolina immunization information. Immunization providers may access all recorded immunizations administered in North Carolina, regardless of where the immunizations were given. The purpose of NCIR is:

- To give patients, parents, health care providers, schools and childcare facilities timely access to complete, accurate and relevant immunization data;
- To assist in the evaluation of a child's immunization status and identify children who need immunizations;
- To assist communities in assessing their immunization coverage and identifying areas of under-immunization.

NCIR providers can enroll in the CDC COVID-19 Vaccine Program at <https://covid-enroll.ncdhhs.gov>.

## Key Roles

- **Organization Administrator:** Person responsible for initiating the provider enrollment process on behalf of an organization and managing the organization in NCIR.
- **Vaccine Coordinator (Primary & Back-up):** Person responsible for completing Section B of the CDC COVID-19 Vaccination Provider Enrollment Agreement in CVMS Provider Enrollment Portal. The back-up is the second point of contact after the Primary Vaccine Coordinator for a specific location.
- **NCIR Administrator:** Person responsible for adding/deactivating additional users at site, managing clinicians within NCIR, determining the appropriate user role to assign to individual users who access NCIR
- **DHHS Immunization Branch (IB) Enrollment Team:** Responsible for reviewing and approving locations who have submitted their completed CDC COVID-19 Vaccination Provider Enrollment Agreement through the CVMS Provider Enrollment Portal.

## Your enrollment journey begins here...

### 1 Start COVID-19 Vaccination Provider Enrollment Agreement

Organization Administrator receives email from NCDHHS with the link to the Provider Enrollment (PE) Page or goes to: <https://covid-enroll.ncdhhs.gov>. Create a username and password for login.

**Responsible: Organization Administrator**

### 2 Provide Organization Details

Organization Administrator will complete Section A by providing details including:

- Organization details
- Details of each location within the organization
- Vaccine Coordinator details for each listed location
- Selection of Provider Type
- CEO and CMO contact information

**Responsible: Organization Administrator**

### 3 Select NCIR System and Complete Agreement

Organization Administrator will select NCIR as the preferred system for managing COVID-19 vaccinations and complete the NCIR Agreement.

**Responsible: Organization Administrator**

### 4 Register Each Vaccine Location

**Provider Enrollment Portal - Section B**

Location Vaccine Coordinators will receive a unique email link to create a login for the CVMS Provider Enrollment Portal and complete Section B. Details include:

- Storage & Handling capabilities
- ALL Healthcare providers at that location who are licensed to authorize the vaccination.
- Identifying first NCIR Administrator user

**CEO and CMO will sign the completed Agreement before submitting.**

**Responsible: Vaccine Coordinator, CMO & CEO**

*Submitted applications undergo an extensive approval process by NCDHHS. Due to high volume of applications at times, you may have a delay in response. Please allow up to two weeks for a response.*

### 5 Provider enrollment tasks complete!

### 6 Create User Accounts for NCIR Users

Following approval, the NCIR Administrator identified in Section B will be added to NCIR by NCDHHS IB Enrollment Team. This user will be responsible for adding the organization's NCIR users and clinicians. Users will provide their NCID username to the NCIR Administrator to add them to the system.

**Responsible: Vaccine Coordinator**

*If users do not already have an NCID account, they will need to self-register for one in the [North Carolina Identity Management portal](#) by following these [detailed instructions](#). Note: Users must register using the "Business" account type.*

**DO NOT** begin reporting COVID-19 vaccine administrations in NCIR until indicated in the final setup complete email.

### 7 Receive and Manage Vaccine Inventories

NCIR users designated with Inventory Control will have access to view and manage vaccine inventories, orders, and transfers, as well as to record wastage.

**Responsible: Inventory Control User, NCIR Administrator**

### 8 Receive Email That NCIR Setup Is Complete

The Vaccine Coordinator, Organization Administrator, CEO & CMO will receive a final email indicating when to start managing COVID-19 vaccines in NCIR.

**Responsible: Vaccine Coordinator, Org Admin, CMO & CEO**

### 9 Display Locations on Vaccines.gov Website

Log into the CVMS Provider Enrollment Portal and use the Vaccines.gov Locations tab to add, remove, and edit sites.

**Responsible: Vaccine Coordinator**

### 10 Add New Clients

NCIR users authorized to do so can add new clients into NCIR after conducting a client search and confirming they do not exist in the system already

**Responsible: Typical Users, Inventory Control User, NCIR Administrator**

### 11 Document Vaccination

During the vaccination appointment, authorized users are responsible for logging a recipient's vaccination within NCIR.

**Responsible: Typical Users, Inventory Control User, NCIR Administrator**

**Key:** ● NCIR Enrollment/Onboarding ● Preparation Steps ● NCIR Vaccine Management

Questions? You can submit a [ticket](#) or call the NC Vaccines Help Desk at 1-877-873-6247 (Monday-Friday 7:00 AM - 7:00 PM ET and Saturday 8:00 AM - 4:00 PM ET)

# Step-by-Step Instructions for NCIR Enrollment

## STEP 1: Start COVID-19 Vaccination Provider Enrollment Agreement

A designated Organization Administrator receives email from NCDHHS with guidance on enrolling their organization in the COVID-19 Vaccination Provider Program. The email will contain a link to the Provider Enrollment (PE) Page. Once navigating to the login page, select Register in the bottom right corner to create a username and password for login.

The COVID-19 Vaccination Provider Enrollment Agreement can also be accessed by going to <https://covid-enroll.ncdhhs.gov>.

**HELPFUL LINKS:** [NCIR Education Page](#)

## Section A

### STEP 2: Provide Organization Details

Organization Administrators will enter the information for the Organization Administrator (Section A) in the CVMS Provider Enrollment Portal by providing the following information:

- Organization details
- Name of the Organization Administrator and contact information
- All location(s) that will administer vaccinations and the onsite Vaccine Coordinator contact information
- Names of Executive Officers (CEO and CMO) and contact information

**HELPFUL LINKS:** [Register Your Organization and Select System User Guide](#)

### STEP 3: Select NCIR System and Complete Agreement

Organization Administrators will review the system selection considerations and select NCIR as appropriate. The NCIR Agreement will then be presented and agreed to by checking the box.

**HELPFUL LINKS:** [System Selection Considerations](#)

## Section B

### STEP 4: Register Each Vaccine Location

After the Organization Administrator completes Section A, the Vaccine Coordinator will receive an email inviting them to register for the Provider Enrollment Portal by creating a username and password. Once logged in, they will complete Section B for their assigned location(s) with the following details:

- Location address and contact information
- Names of a primary and a back-up Vaccine Coordinator and contact information
- Shipment availability
- Provider type and setting
- Population(s) served
- Storage capacity and storage unit specifications
- List of providers who will administer vaccines, including license numbers with prescriptive authority \*
- Initial NCIR Administrator

Once all required fields are completed for Section B, the Vaccine Coordinator will:

- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement
- Review and sign to the Storage and Handling Attestation

Upon completion of Section B, the organization's CEO and CMO will receive a welcome email inviting them to register and access the CVMS Provider Enrollment Portal to:

- Review the submitted organization information
- Approve submitted organization information via e-signature
- Review and sign the Storage and Handling Attestation
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement

The CEO and CMO signatures are required at completion of Sections A and B.

Note: If necessary, you have the option to resubmit your Section B as well as review all the information you are submitting one more time. Once you reach the final page of Section B, select your reasons for resubmitting and select Resubmit.

**HELPFUL LINKS:**

- [CVMS Provider Enrollment Portal Complete Storage and Handling Attestation Job Aid](#)
- [CVMS Provider Enrollment Portal Sign a Redistribution Agreement Job Aid](#)
- [Register Each Vaccine Location and All Prescribing Providers Who Will Administer Vaccine User Guide](#)



## STEP 5: Provider enrollment tasks complete!

The provider enrollment tasks have been completed.

Submitted applications undergo an extensive approval process by NCDHHS. You will be notified when your file has been approved, denied or requires additional information.

## Preparation Steps

### STEP 6: Create User Accounts for NCIR Users

Once the organization has been approved, the initial NCIR Administrator will receive an email detailing the next steps, including adding users and clinicians who will be administering COVID-19 vaccines, or confirming existing access.

All users must complete the [NCIR Confidentiality Agreement](#). The NCIR Administrator should maintain these on site.

Steps to create users:

- Select **Manage Users**
- Click **Add User**
- Type in the NCID
- Click **Verify**
- Confirm that the information is correct
- Choose the appropriate **User Role**
- Click **Save**

Steps to create clinicians:

- Select **Manage Clinicians**
- Click **Add Clinician**
- Select a **Role** and **Credentials**
- Complete the identifying information
- Select the clinician's site
- Click Save

The user's NCID will also be their NCIR username/user ID. If a user does not already have one, they will need to self-register for a NCID account in the [North Carolina Identity Management portal](#) by following these detailed [instructions](#). Note: NCIR users must register using the "Business" account type.

#### HELPFUL LINKS:

- [Managing Users](#)
- [Managing Clinicians and Physicians](#)

### STEP 7: Receive Email That NCIR Setup Is Complete

The Vaccine Coordinator, Organization Administrator, CMO and CEO will receive a final communication email detailing next steps and when the organization can begin using NCIR to manage COVID-19 vaccinations.



**STEP 8: DO NOT** begin reporting COVID-19 vaccine administrations in NCIR until indicated in the final setup complete email.

### Navigate to NCIR

Added users can access NCIR and capabilities granted based on their specific role's capabilities.

There are different user roles in NCIR. They are defined as:

- **Reports Only:** searches for clients and views/prints client specific records
- **Typical User:** has all functionality that the reports only role has; manages (add & edit) clients; and manages immunization information
- **Inventory Control:** has all functionality that the reports only and typical user roles have; manages inventory and ordering
- **Administrator** (at least 2 required per organization): has all functionality that the other roles have; manages users, sites, and clinicians; and runs practice-level reports, including reminder/recall

**HELPFUL LINKS:** [Logging into NCIR and Common Issues](#)

# Vaccine Management

## STEP 9: Receive and Manage Vaccine Inventories

Users designated as "Inventory Control" or "Administrator" in NCIR can receive and process vaccine inventories in the system. CDC COVID-19 vaccine guidelines require that you maintain accurate COVID-19 inventory levels for each location you support.

After clicking **Manage Orders in NCIR**, you can create, view, and modify vaccine orders.

The Shipping Information includes details about your expected order such as date shipped, quantity shipped, tracking information, vaccine lot number, NDC number, expiration date, and the manufacturer name.

Please reference the user guide in the linked listed below, for detailed instructions on how to complete the following actions relating to vaccine inventories:

- **Ordering COVID-19 Vaccine** -- All COVID-19 vaccine is currently ordered outside of NCIR. Providers need to submit requests via the Allocation Request Form
- **Adding Vaccine Inventory** - When you physically receive a vaccine inventory shipment, you need to add the inventory to your location's vaccine inventory in NCIR. Processing your COVID-19 vaccine shipments correctly will ensure accurate COVID-19 vaccine inventory reporting to the state.
- **Receiving an Inbound Vaccine Transfer** - If you are receiving an inbound transfer from another location using NCIR, process the inventory via the **Manage Transfers** page in NCIR.
- **Sending an Outbound Vaccine Transfer** - If you are sending an outbound transfer to another location using NCIR, process the inventory via the **Manage Transfers** page in NCIR.
- **Updating Vaccine Records** - You will be able to update the vaccine inventory record. It is very important to ensure accurate data entry when processing a new COVID-19 vaccine inventory shipment.
- **Running an Inventory Reconciliation Report**- An inventory reconciliation report will show you what the NCIR says you have in your inventory and give you room to write your actual count from your refrigerator so that you can begin to balance your inventory.

### HELPFUL LINKS:

- [Ordering, Transferring and Inventory Management for COVID-19 Vaccine](#)
- [NCIR to CVMS Transfer Form](#)

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## STEP 10: Display Locations on Vaccines.gov Website

1. To display your vaccination sites on the CDC's Vaccines.gov Vaccine Site Locator website, log in to the CVMS Provider Enrollment Portal.
2. Navigate to the Vaccines.gov Locations tab and click on the location name you wish to add to the Vaccines.gov Vaccine Site Locator website.
3. Enter your vaccination location information and then select "Yes" under "Display on Vaccine Site Locator" to add your site to the CDC's Vaccine Site Locator website if your location provides COVID-19 vaccines to the general public. Click "SAVE" once you are ready to publish the location.

### HELPFUL LINKS:

- [Display on Vaccine Site Locator](#)
- [Vaccines.Gov Vaccine Site Locator User Guide](#)

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## STEP 11: Add New Clients

In order to add a new client in NCIR, you must first search for the client. If you have conducted a client search and you receive the following message: "no clients were found for the requested search criteria", your client is not located in the system.

If no client is found, Administrators must complete the following steps to add clients:

- Search for client
- Once client is found, select **Add This Client**
- Fill in all required fields (required fields are marked in blue with an asterisk)
- Under the **Client Information tab** verify the status of the patient
- Under **the Responsible Person(s) tab**, enter all required information about the responsible parties for the patient
- Under **the Client Comment(s) tab**, choose the appropriate contraindication, click on the **Client Comment** drop down box
- Once you have logged in all the client information, select **Save**

### HELPFUL LINKS:

- [Searching for Clients](#)
- [Adding New Clients](#)

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## STEP 12: Document Vaccination

Administrators must complete the following steps to document COVID-19 vaccination:

- Navigate to **Client Record**
- Select **History/Record**
- Review History Recommendation Screen
- Select **Historical Immunization**
- Select either **New Immunization Entry** or **Add Selected**
- Enter **Live Immunization** Details
- Both options will take you to the same entry screen. However, you must select the vaccines that you would like to document manually when New Immunization is clicked. Add Selected will add the selected immunizations (via the green check marks) automatically for you.
- Select **OK** when completed
- Review Submission and print record, as needed

### HELPFUL LINKS:

- [Adding and Editing New Immunizations](#)
- [Adding and Editing Historical Immunization](#)
- [Reviewing and Printing Immunization Records](#)