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

Navigate the CVMS Provider Portal User Guide

Version 13
December 17, 2021
On the home page of the NC Vaccines Help Desk Portal, select Login at the top right-hand corner, then select the "Vaccine Provider" option to submit your question, issue, or request.

Providers that are first time users of the NC Vaccines Help Desk Portal will have to follow the steps below:

1. Register for an account by clicking 'Login' then 'Register' on the left side of the screen
2. Populate your first name, last name, business e-mail, and registration code
   
   *Note: If you do not know your organization's registration code (ORG-ID), please contact the help desk*
3. You will receive an e-mail with your username and temporary password to log into the portal

If you have any questions, issues or requests, please go to the NC Vaccines Help Desk *at [https://ncgov.servicenowservices.com/csm_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)*

You can also call the NC Vaccines Help Desk at (877) 873-6247 and select option 1.

The NC Vaccines 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 NC Vaccines Help Desk Portal, select Login at the top right-hand corner, then select the "Vaccine Provider" option to submit your question, issue, or request.
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Overview
The CVMS Provider Portal allows Healthcare Providers in North Carolina to manage the administration of the COVID-19 vaccine. The CVMS Provider Portal is different than the CVMS Provider Enrollment Portal, where Healthcare Providers enroll in the NC Vaccination Program and maintain their provider agreement.

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

The processes included in this training are for the Healthcare Provider, Healthcare Location Manager, and Statewide Location Managers profiles. For Statewide Location Managers, all information for the Healthcare Provider profile will apply to the Statewide Location Manager profile. The ‘Add A Healthcare Provider Location’ section is only for Statewide Location Managers.

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

Now, let’s get started!
Log in to the CVMS Provider Portal
How to Log in to CVMS
Enter NCID Username and NCID Password

2. Click on the NCID button
3. Enter your NCID username and NCID password
4. Click NCID LOGIN
5. You are logged in to the CVMS Provider Portal

For guidance on obtaining an NCID, refer to this user guide: [https://covid19.ncdhhs.gov/step-3-obtain-ncid-credentials-0](https://covid19.ncdhhs.gov/step-3-obtain-ncid-credentials-0)

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

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

1. Read the statement

2. Click on I AGREE

Confidentiality Agreement

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

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

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

1. Users with **Healthcare Provider** profile have the tabs shown below: Home, Recipient, Appointments, Locations, and Help & Information

2. Users with **Healthcare Location Manager** profile have the tabs shown below: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, Organization management, Account Management, Reports, Files, and Help & Information

3. Users with **Statewide Location Manager** profile have the tabs shown below: Home, recipient, appointments, locations, bulk registration, help & information, and reports
How to Select Location
(Users Assigned to Multiple Locations Only)
Multi-Location Users Only: Select Location Using ‘Select Location’ Before Proceeding

Users associated with multiple locations can select the location from which they are operating in the CVMS Provider Portal. Upon logging in, the user will have access to their Default location. In this example the default location is TestLoc_UAT1.

All of the operations in the Portal (e.g., booking appointments, logging vaccine administration) will be attributed to the location that you select.

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

If reconnecting after logging out, your location will have been erased and you will need to once again select the location where you are operating from.
Logging In to Another Location (if necessary)

At any time, you can switch to another location if you need to support another location by using the SELECT LOCATION button.

1. Click on the SELECT LOCATION button

2. Select the appropriate location from the list that appears and click SUBMIT

3. Please always confirm that your location was switched to the location of your choice by checking the location name displayed at the top of the HOME page

Tips

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

If you have a Statewide Location Manager profile, please read Statewide Location Manager Profile: Add a Healthcare Provider Location at the end of this User Guide.
How to Add and Access Additional Locations
(Users with Statewide Location Manager Profile Only)
If you are a Statewide Location Manager, you can add new locations to the list of locations for you to select you are operating from by clicking the ADD LOCATION button.

1. Click on the ADD LOCATION button

Tips
Learn more about it in the Statewide Location Manager Profile - Switch Location Job Aid at https://covid19.ncdhhs.gov/cvms-statewide-location-manager-profile-switch-location-job-aid/download.
Step 2 of 3: Search and select the location

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

1. Click on the **SWITCH LOCATIONS** button
2. Select the newly added location you wish to login in as
3. Click **SUBMIT**
Navigate the CVMS Provider Portal
Step 1 of 13: View the CVMS Provider Portal Homepage

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

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

**Audience**

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

**Tips**

If inactive for 2 hours, the session will expire, and you will have to sign back into the CVMS Provider Portal. **If you are timed out**, you will need to start your current action over, as the system will not save where you left off.
Step 2 of 13: Recipient Tab Overview

The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal. Your search results will also include in the lower section any records of a recipient who received a COVID-19 vaccine dose from a Federal Long-Term Care Facility Program partner (e.g., CVMS, Walgreens) or from a Federal Retail Pharmacy partner (e.g., CVS, Walgreens).

Tips

Step 3 of 13: Appointments Tab Overview

The **APPOINTMENTS** tab shows a list of appointments in CVMS Provider Portal. Click the Case Number to view appointment information. You can search appointments by Name, Location, Confirmation Code, Vaccine Status, or Date.

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

**Tips**
The appointments tab will default to show you appointments that are scheduled for the same day for the location you are logged in under.
The **LOCATIONS** tab can be used to list your location’s details on the Vaccine Site Locator website ([https://vaccines.gov](https://vaccines.gov)), and to share your scheduling website to recipients. You can also create additional locations to list on the Vaccine Site Locator website (e.g., a community vaccination event covered by your location). If your location elects to use the scheduling feature in CVMS, your location record links to the scheduling feature in CVMS so that recipients can use CVMS to book appointments at your location.

**Note:** This tab will only be available if you have the Healthcare Location Manager profile.
The **BULK REGISTRATION** tab allows you to upload a list of recipients and generate their invitation to register in the COVID-19 Vaccine Portal to receive a COVID-19 vaccine.

**Audience**

- Healthcare Location Manager
- Statewide Location Manager

**Tips**

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

1. To pin a list view, click 🔄. The pinned list view will then load as the default list view.

2. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column’s first record ↑ (alphanumerically) or its last ↓ (Down Sort icon).

3. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

Note: This tab will only be available if you have the Healthcare Location Manager profile.
1. The **VACCINE MARKETPLACE** tab allows Healthcare Location Managers to directly communicate and collaborate to arrange for the transfer of vaccine inventory from site to site.

2. Healthcare Location Managers can seek matches, place wanted transfers, and place extra transfers.

**Note:** This tab will only be available you have the Healthcare Location Manager profile.
1. The **SHIPMENTS** tab allows you to see your location’s COVID-19 vaccine shipment information.

2. To pin a list view, click ⬅️. The pinned list view will then load as the default list view.

3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column’s first record 🔄 (alphabetically) or its last ➤ (Down Sort icon).

4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

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

![Organization Management Tab](image.png)

<table>
<thead>
<tr>
<th>ACCOUNT NAME</th>
<th>INDUSTRY</th>
<th>PHONE</th>
<th>ADDRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>TESTEmployerOrg</td>
<td>Critical Manufacturing</td>
<td>222-222-2222</td>
<td>asdf asdf asdf 22222</td>
</tr>
<tr>
<td>Grace Commercial Org</td>
<td>Commercial Facilities for Essential Goods</td>
<td>555-555-5555</td>
<td>2222 North St Charlotte, North Carolina 27603</td>
</tr>
</tbody>
</table>

**Tips**


**Audience**

Healthcare Location Manager
Step 10 of 13: Help and Information Tab Overview

The HELP & INFORMATION tab allows you to see Frequently Asked Questions and General Information about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccine Registration Form.
Step 11 of 13: Report Tab Overview

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

Note: This tab will only be available if you have the Healthcare Location Manager profile.
Step 12 of 13: Account Management Tab Overview

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

**Tips**

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

**Note:** Most users will not have access to this feature.
How to Use the Vaccine Virtual Agent
Launching the Vaccine Virtual Agent

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

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

The CVMS Virtual Agent launches in a new window.

1. Read the message, then click I AGREE
2. Select your type of profile

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

Vaccine Virtual Agent

We collect session information to personalize your experience, improve the quality of the virtual agent, provide new content and features over time, and analyze the traffic. It includes:
- Your interactions with the Virtual Agent (i.e., text of original questions entered and responses received, buttons clicked, session date and time)

When interacting with the virtual agent, you do not need to enter any personal information (i.e. your name, address, email address, login, password...).

By clicking "I agree", you consent to the collection and use of your information for analytical purposes and for services provided by the Department of Health and Human Services of the State of North Carolina.

I Agree

Hi! I'm Sophia, the State of North Carolina's virtual agent for Covid-19 vaccines.
I am here to serve Healthcare Providers, Help Desk Representatives and Organization Administrators.

Before we start, please select one of the options below:

- Healthcare Provider
- Help Desk Representative
- Organisation Administrator
- Other

Type your message...
Access Reports
(Users with a Location Manager Profile Only)
A report is a list of records that meet defined criteria. It is displayed in the CVMS Provider Portal in rows and columns, and can be filtered and sorted, or exported into Excel. It shows the latest data, and automatically updates as each record updates. This user guide will show you:

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

Only users with a Healthcare Location Manager profile can access available reports. They cannot create new reports or add new fields to the existing reports.
Reports available in the CVMS Provider Portal

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

1. **Expiring Doses by Account and Manufacturer Report** – provides a breakdown of upcoming vaccine expirations to help prioritize administration or transfers

2. **HCP Healthcare Roles Report** - identify all users and associated roles at the location of the logged-in user

3. **Inventory Summary Report** - view your location(s) COVID-19 vaccine inventories

4. **Marketplace Inquiries Report** – view all inquiries made against your seek transfer matches in the Vaccine Marketplace

5. **Recipient Vaccination Report** - view all recipient vaccination details of your location(s)
Accessing Reports

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

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

**Note**

The page displayed when clicking the **REPORTS** tab will include standard fields and features that cannot be leveraged with your current profile level. Views named ‘Created by Me’, ‘Private Reports’, ‘Shared with Me’, and ‘All Favorites’ will not display any reports.
Accessing Reports
1 - Learn how to Filter and Format Reports
Applying Filters

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

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

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Healthcare Location Manager

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

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

1. Click the **FILTER** icon ▼
2. Click the **DELETE** icon ighbors on eligible filter’s criteria
Several buttons are available to change the format of the Reports:

<table>
<thead>
<tr>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare Location Manager</td>
</tr>
</tbody>
</table>

### Inventory Summary Report

<table>
<thead>
<tr>
<th>Vaccine Inventory Name</th>
<th>Lot</th>
<th>Product</th>
<th>NOC (Product)</th>
<th>Expiration Date (MM/DD/YYYY)</th>
<th>Date and Time Received (MM/DD/YYYY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grose Pfizer Inventory 909</td>
<td></td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>2/28/2021, 12:00 PM</td>
<td>1/13/21, 12:00 PM</td>
</tr>
<tr>
<td>Expiration 1/31/2021 8:30</td>
<td>100</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/13/2021, 8:30 AM</td>
<td>1/12/2021, 2:30 PM</td>
</tr>
<tr>
<td>Delivery 01/07/2021</td>
<td>300</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/12/2021, 12:00 PM</td>
<td>1/7/2021, 2:30 PM</td>
</tr>
<tr>
<td>Delivery 01/25/2021</td>
<td>2</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/28/2021, 12:00 PM</td>
<td>1/25/2021, 2:30 PM</td>
</tr>
<tr>
<td>Grose Pfizer Inventory 3</td>
<td>1111</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/31/2021, 12:00 PM</td>
<td>1/26/2021, 2:30 PM</td>
</tr>
<tr>
<td>Delivery 01/26/2021</td>
<td>1000000</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/26/2021, 12:00 PM</td>
<td>1/26/2021, 2:30 PM</td>
</tr>
<tr>
<td>Delivery 01/28/2021</td>
<td>100</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/31/2021, 12:00 PM</td>
<td>1/26/2021, 2:30 PM</td>
</tr>
<tr>
<td>Delivery 01/31/2021</td>
<td>3245</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/31/2021, 12:00 PM</td>
<td>1/31/2021, 2:30 PM</td>
</tr>
<tr>
<td>Nino Grose Pfizer Biotech Inventory for testing alcohol</td>
<td>3000</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/31/2021, 12:00 PM</td>
<td>1/31/2021, 2:30 PM</td>
</tr>
<tr>
<td>Grose Pfizer Inventory 2</td>
<td>5000000</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/31/2021, 12:00 PM</td>
<td>1/31/2021, 2:30 PM</td>
</tr>
<tr>
<td>MEDIC MCMV Chest 1</td>
<td></td>
<td>Moderna (SARS-CoV-2) COVID-19 Vaccine 8077002</td>
<td>90267-1000-02</td>
<td>1/31/2021, 12:00 PM</td>
<td>1/31/2021, 2:30 PM</td>
</tr>
<tr>
<td>ADN/inventory</td>
<td>50034255</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/31/2021, 12:00 PM</td>
<td>1/31/2021, 2:30 PM</td>
</tr>
<tr>
<td>Grose Pfizer Inventory 3</td>
<td>9000900</td>
<td>Pfizer/BioNTech (COVID-19) Vaccine 0001</td>
<td>90267-1000-02</td>
<td>1/31/2021, 12:00 PM</td>
<td>1/31/2021, 2:30 PM</td>
</tr>
</tbody>
</table>

Total Records: 52
Total Doses Available: 7,098
Total Doses Administered: 227
Total Doses for 204
Total Doses Lost in Format: 2
Total Shipment: 204
Total Favorite: 513

[Image of Vaccine Inventory Report]
Formatting Reports

1. Show or hide **TOGGLE CHART** by hitting the Chart button 📊 or 📊 Add Chart located at the top-right of the report; the Chart displays the number of records per location.

2. Show or hide **ROW COUNTS** by clicking the Row Counts button Row Counts 🏆 located at the bottom to show or hide the Total Records count field displayed at the top left of the report.

3. Show or hide **DETAIL ROWS** by clicking the Row Counts button Detail Rows 🏆 located at the bottom to show or hide the records’ details (one row = one record).

4. Show or hide **SUBTOTALS** by clicking the Row Counts button Subtotals 🏆 located at the bottom to show or hide the row Subtotals which is the last row of the location.

5. Show or hide **GRAND TOTAL** by clicking the Row Counts button Grand Total 🏆 located at the bottom of the report to show or hide the Totals displayed at the top of the report.

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**Audience**

Healthcare Location Manager

**Tips**

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

Formatting changes made to a report will carry over to the Format Report export option.
Use the SEARCH feature at the top of the report to identify records containing values matching key words.

1. Click on the **SEARCH BUTTON**
2. Type a key word within the **SEARCH BAR**
3. Each value within the report matching the key word will be highlighted in yellow.
4. You can navigate from one search result to the next by hitting the up and down buttons that appears within the search bar
Accessing Reports
2 - Learn How to Export Reports
Step 1 of 3: Exporting Reports

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

1. Open the report, click on **EXPORT**
Step 2 of 3: Formatting Reports

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

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Healthcare Location Manager

Tips

Review the previous section to see how to change the format and filters of a report.
Step 3 of 3: Exporting Reports

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

3 - Discover Available Reports
View the list of your location’s users with access to the CVMS Provider Portal as well as their assigned roles.

**INFORMATION DISPLAYED:**
- First name, last name, title, NCID, email, last login

**FILTERS AVAILABLE:**
- Last Login Time and Date
- Note: Filter ‘Show Me All Users’ cannot be modified
View your locations’ inventory summary details.

**INFORMATION DISPLAYED:**

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

**FILTERS AVAILABLE:**

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

_A user associated to more than one location will see inventory information associated to each of these locations in this report._
Recipient Vaccination Report

View all recipient vaccination details of your location.

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

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

Audience
Healthcare Location Manager

Tips
A user associated to more than one location will see vaccination information associated to each of these locations in this report.
Accessing Reports
4 - Check Reports’ Data Dictionaries in the Help & Information tab
Accessing Help & Information

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

1. Navigate to **MORE** on the Menu Bar then select **HELP & INFORMATION**
1. Navigate to and click on the **DICTIONARY FOR PROVIDER REPORTS** to see associated articles.

**Audience**

- Healthcare Location Manager
Selecting Articles in the Dictionary for Provider Reports

1. Select the desired article to view.

Audience

Healthcare Location Manager
1. Each dictionary will provide a detailed list of terms for each report available.
Appendix
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.

• Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.

• A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Supported Web Browsers:

• Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.

• For more details on supported browsers, see [https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)

• Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.
<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Changes Made</th>
<th>Author</th>
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<tbody>
<tr>
<td>1</td>
<td>12/10/2020</td>
<td>• Uploaded the first version of the PPT</td>
<td>Training Team</td>
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<tr>
<td>2</td>
<td>1/10/2021</td>
<td>• Removed any mention of the 2 CVMS Help Desk emails</td>
<td>Courtney Seward</td>
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<td></td>
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<td>• Added Service Now Portal information</td>
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<td>• Screenshot of new bulk upload added</td>
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<td>3</td>
<td>1/15/2021</td>
<td>• Updated navigation bars for both CVMS Provider Profiles</td>
<td>Azalea Troche</td>
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<td></td>
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<td>• Updated Recipient Tab search feature</td>
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<td>4</td>
<td>2/1/2021</td>
<td>• Updated the screen shots for Location manager to show reports tab on nav bar</td>
<td>Kristin Clark; Tabitha McKelvy</td>
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<tr>
<td></td>
<td></td>
<td>• Added Statewide Profile content</td>
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<td>• Added Reports tab content and Appointments tab content</td>
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<td>5</td>
<td>2/12/2021</td>
<td>• Add Slides for Account Management and Organizational Management</td>
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<td></td>
<td></td>
<td>• Added session expired tip</td>
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<td></td>
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<td>• Added multi locations slide</td>
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<td>• Updated screen shots of the expanded more tabs list</td>
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<td>6</td>
<td>3/11/2021</td>
<td>• Added Locations tab slide</td>
<td>Kristin Clark</td>
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<tr>
<td></td>
<td></td>
<td>• Changed Scheduling tab to show Locations tab</td>
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<td>• Updated all nav bars for location manager</td>
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<td>• Updated screen shots to show Recipient Check In component</td>
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<td>• Updated Recipient screenshot to include e-mail search and Vaccine Product Name</td>
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<td>• Updated Appointments screenshot to include Cancellation status</td>
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<td>• Added “confirmation code” to text to Appointments search</td>
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<td>• Updated Switch Locations screenshot to include current navigation bar</td>
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<td>• Added Confidentiality Agreement at first login slide</td>
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<td>• Added Vaccine Marketplace Overview</td>
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<td>• Added Files Tab Overview</td>
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<td>• Updated screenshots to reflect Vaccine Marketplace Tab</td>
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<td>6/28/2021</td>
<td>• Added chatbot/Vaccine Virtual Agent slides</td>
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<td></td>
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<td>• Updated branding from MySpot.NC.gov to Vaccines.gov</td>
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## User Guide Change Log

<table>
<thead>
<tr>
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<td>07/28/2021</td>
<td>• New consolidated version&lt;br&gt;• Added Accessing Reports to the User Guide</td>
<td>Vanessa Kemajou, Darrell Lee</td>
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<td>11</td>
<td>09/01/2021</td>
<td>• 38 – Listed additional reports</td>
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<td>12</td>
<td>09/14/2021</td>
<td>• Help desk hours updated</td>
<td>Kaitlin Gates</td>
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<td>13</td>
<td>12/17/2021</td>
<td>• 2: Help Desk name updated to “NC Vaccines Help Desk”&lt;br&gt;• 11, 12, 13, 15, 17, 55: Updated screenshots/text to reflect change to “Select Location”&lt;br&gt;• Updated Outdated Screenshots&lt;br&gt;• Updated Section Titles and Divider Slides&lt;br&gt;• Updated Text on Slides 10 &amp; 12</td>
<td>Niya Nelson, Darrell Lee</td>
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