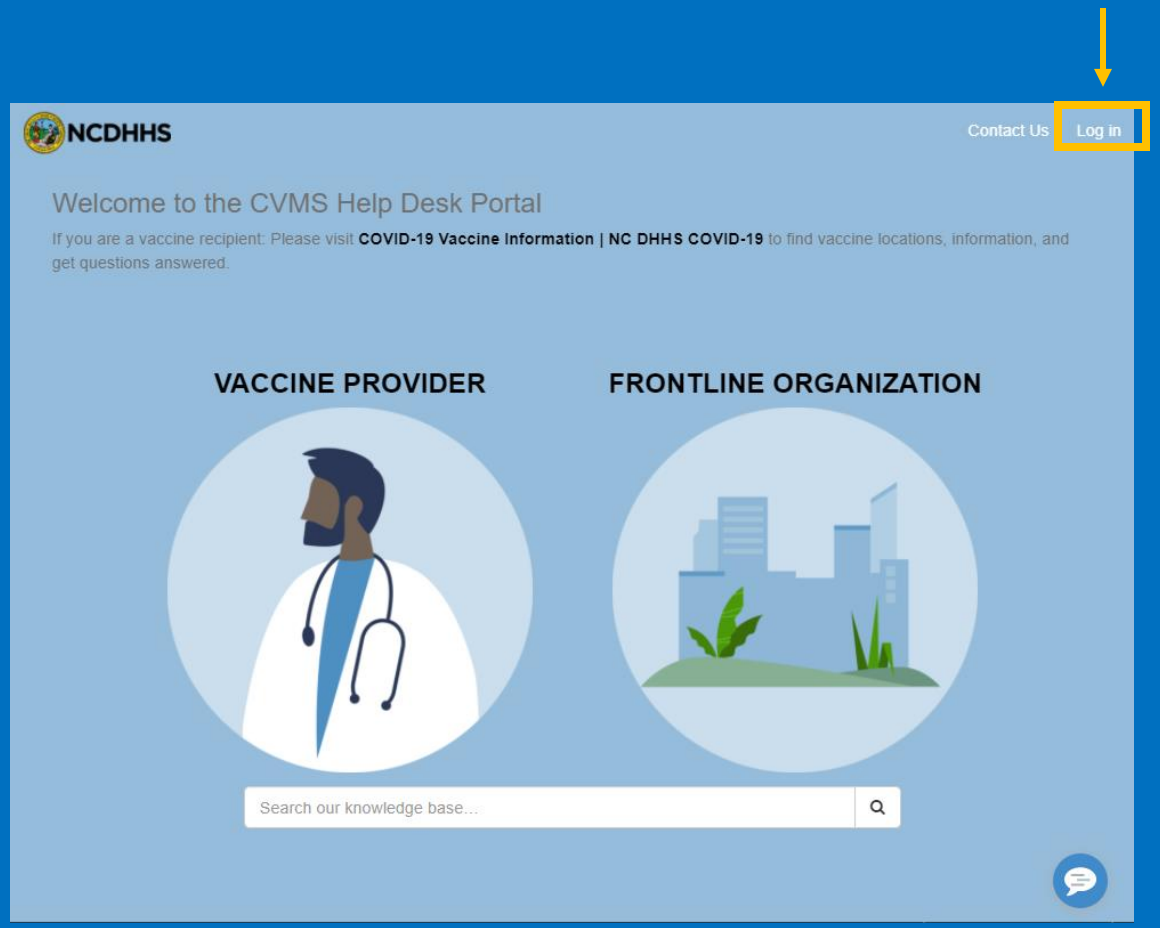
North Carolina COVID-19 Vaccine Management System (CVMS) Provider Portal

Step 6 - Receive and Manage Vaccine Inventories User Guide

Version 21

December 17, 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 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

* On the home page of the CVMS Help Desk Portal, select **Login** at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

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

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

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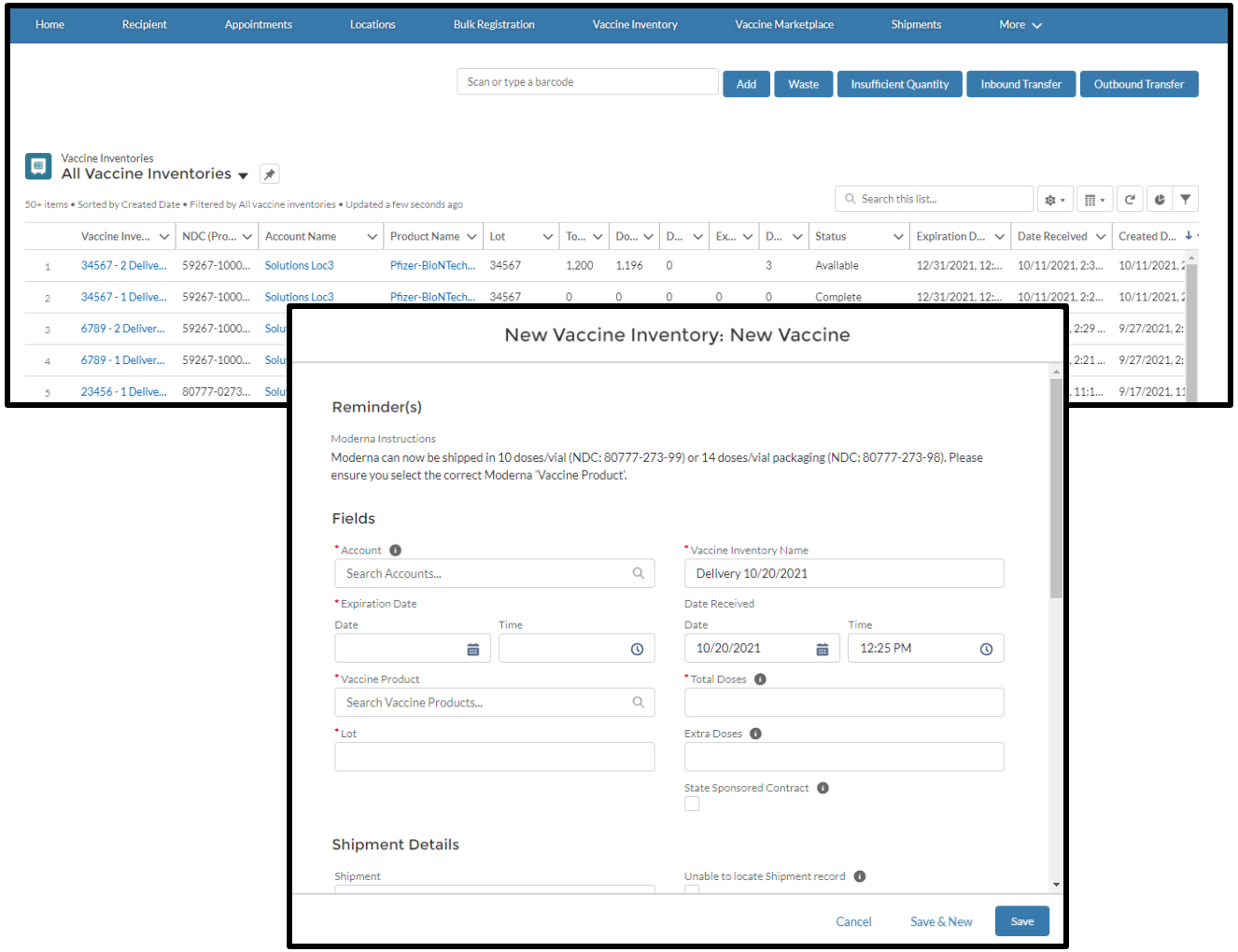
Overview

Inventory Management Overview



To provide NCDHHS with an accurate picture of the COVID-19 vaccine inventory available across all provider locations, you will need to update the CVMS Provider Portal with COVID-19 vaccine inventory receipts of shipments, reductions, deprecations, and transfers / redistributions to other providers or other locations within your organization.

If you have a surplus of COVID-19 vaccine doses or if you need additional COVID-19 vaccine doses, use the **VACCINE MARKETPLACE** to directly coordinate with another provider and agree to transfer COVID-19 vaccine doses.

The processes discussed in this training guide are primarily for users with a **Healthcare Location Manager** profile.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers. Internet Explorer or older versions of Edge (non-Chromium) browsers are not supported.
- 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!

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Receiving Vaccines

Overview of the COVID-19 Vaccine Inventory Receiving Process

1

Once a COVID-19 vaccine shipment is on its way, the Primary Vaccine Coordinator will receive an email notification.

From the homepage, click to the Shipments page to **review shipment information.**

A list of shipments will be on the Shipments page.

You will be able to view on this page shipment information, including date shipped, quantity shipped, tracking information, vaccine lot #, NDC #, expiration date, and the manufacturer name.

2

When you **receive a** COVID-19 vaccine shipment, you will **add the inventory** to your location's overall COVID-19 vaccine inventory.

Navigate to the Vaccine Inventory tab and click add.

Enter all needed details into the prompted fields for the shipped COVID-19 vaccine inventory.

Review and save the inputted information.

3

Need to make updates to a Vaccine Inventory Record? You will be able to edit a few fields including the Extra Doses field and the Vaccine Inventory Record Name. You will also be able to update the Vaccine Inventory Status to Complete when there are no more doses available.

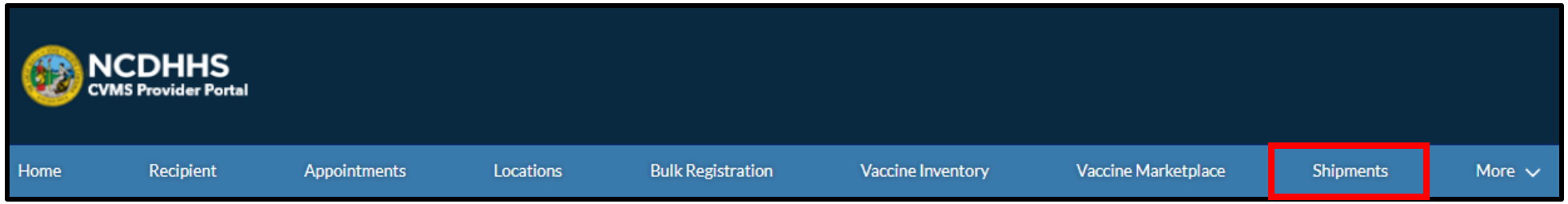
All edits to the Vaccine Inventory Record will be tracked.

Track Vaccine Shipment Notice

Step 1 of 5: Navigate to Shipments

Once a COVID-19 Vaccine Iinventory shipment is on its way, a **VACCINE SHIPMENT RECORD** will be available for you to review in your **SHIPMENTS TAB**.

1. At the top of your home page, click **SHIPMENTS**
2. After clicking **SHIPMENTS**, you will be directed to the **SHIPMENTS PAGE**



Audience

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Tips

The Primary Vaccine Coordinator will be notified when a COVID-19 vaccine shipment is on its way. The Primary Vaccine Coordinator was identified by the Organization Administrator during the enrollment process in the CVMS Provider Enrollment Portal.

.

Step 2 of 5: The Primary Vaccine Coordinator is also Notified by Email

Primary Vaccine Coordinators will also be notified via **EMAIL** if a **VACCINE SHIPMENT** has been processed for location(s) they support. You can expect the email to come from the **CVMS Support Team**.

The Primary Vaccine Coordinator will receive an email notification for each shipment **BY VACCINE TYPE**. Details in the email will include:

- Date Shipped
- Quantity Shipped
- Manufacturer
- NDC Number
- Lot Number
- ExIS Order Number
- Carrier
- Shipment Tracking Number

Note: Email will come from nccvms@dhhs.nc.gov

Hello John Smith,

Please see below for details of a COVID-19 vaccine shipment that is on its way to your location.

Vaccine Details:

- **Date Shipped:** 02/01/2021
- **Quantity Shipped:** 300
- **Manufacturer:** Moderna TX
- **NDC:** 80777-0273-99
- **Lot Number:** 032L20A
- **ExIS Order ID:** FLU920001FC01302021

Shipment Tracking Information:

- **Carrier:** UPS1
- **Shipment Tracking Number:** 1Z126W010100941170

Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine.

Thank you, NC Department of Health and Human Services

Division of Public Health

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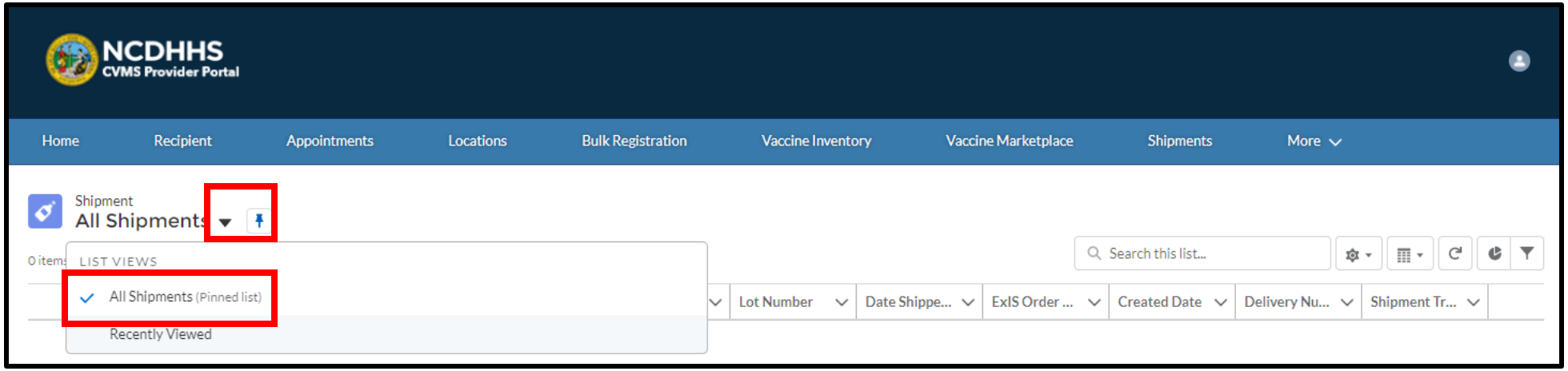
Step 3 of 5: Switch Shipment Record List Views

You will see a **LIST VIEW** on your page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed list view. To see all your Shipment Records, you will have to switch to the 'All Shipment' records list view. You will be able to switch back and forth between list views.

1. Click the **DROP-DOWN MENU** next to the list view name
2. Click **ALL SHIPMENTS**
3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**



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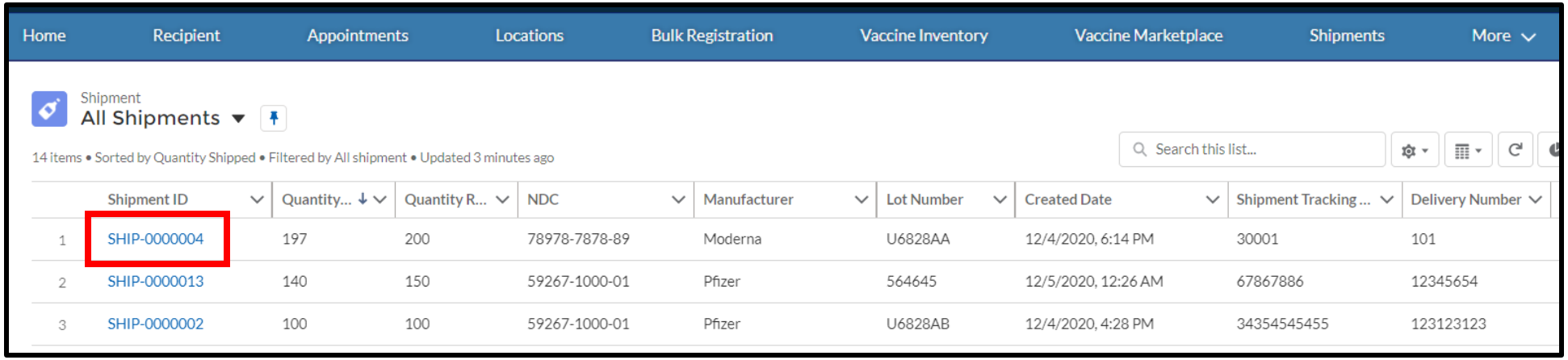
Step 4 of 5: Navigate to the Shipment Record

On this page, you will see a list of Vaccine Shipment records for the location(s) you support. The **VACCINE SHIPMENT RECORD** will be **RELATED** to an **ORDER RECORD.** This means that your Vaccine Shipment record will always be associated to a specific order.

1. Locate the **SHIPMENT ID**
2. Click the **SHIPMENT ID HYPERLINK**
3. You will be directed to the **VACCINE SHIPMENT RECORD**



	Shipment ID	Quantity...	Quantity R...	NDC	Manufacturer	Lot Number	Created Date	Shipment Tracking ...	Delivery Number
1	SHIP-0000004	197	200	78978-7878-89	Moderna	U6828AA	12/4/2020, 6:14 PM	30001	101
2	SHIP-0000013	140	150	59267-1000-01	Pfizer	564645	12/5/2020, 12:26 AM	67867886	12345654
3	SHIP-0000002	100	100	59267-1000-01	Pfizer	U6828AB	12/4/2020, 4:28 PM	34354545455	123123123

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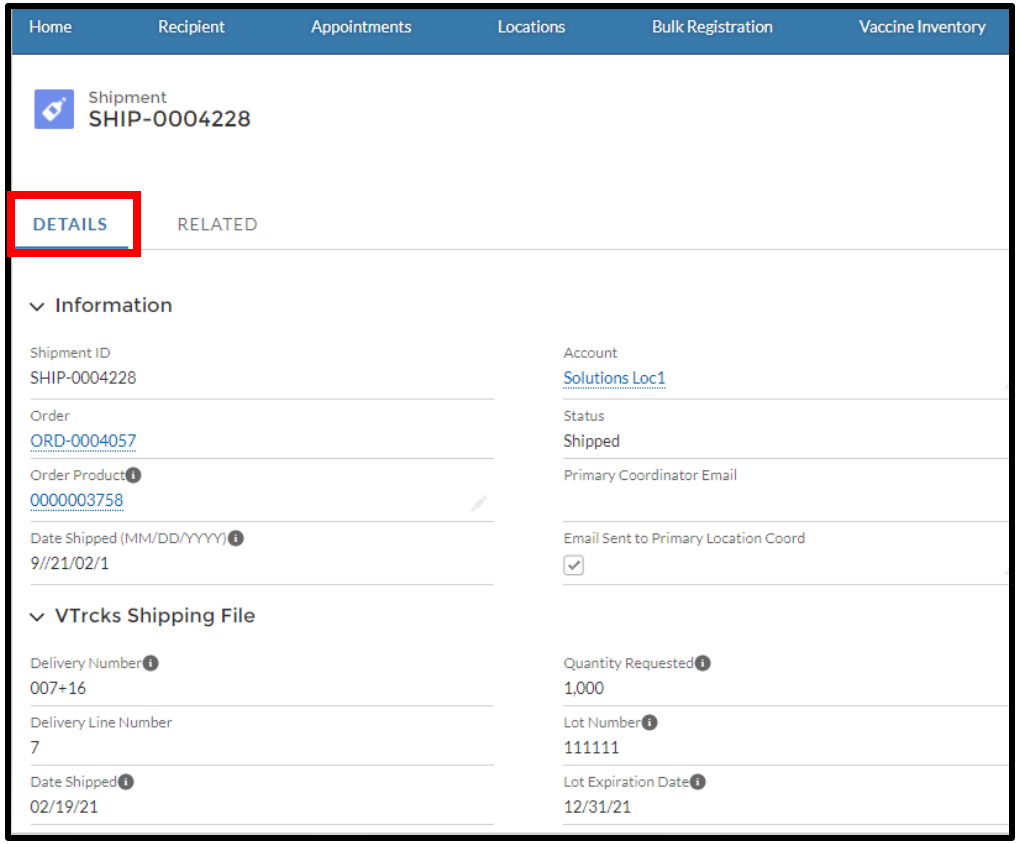
Tips

You can use the SEARCH BAR to search for a record. Clicking on column header will sort by the column.

For example, you may choose to sort by SHIPMENT DATE.

Step 5 of 5: Navigate to the Shipment Details



On the Shipment record, you will be able to **REVIEW DETAILS** about your expected order including:

- Delivery Number
- Date Shipped
- Quantity Requested
- Tracking Information
- Lot #
- NDC #
- Expiration Date
- Manufacturer

1. On the Shipment record, click on the **DETAILS TAB**

Audience

Healthcare Location Manager

Tips

Review specific details about your order.

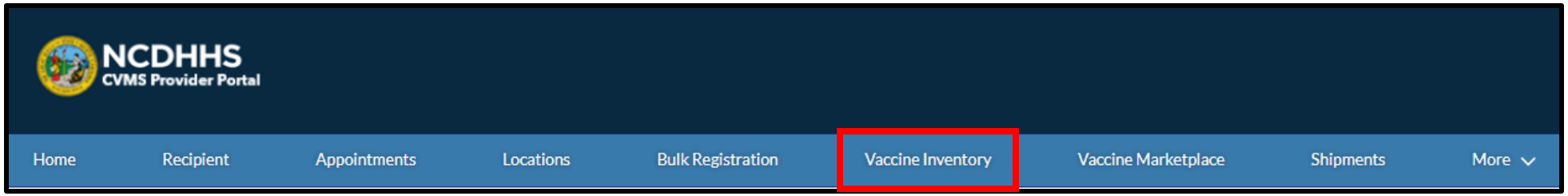
Add New Vaccine Inventory

Step 1 of 6: Navigate to the Vaccine Inventory tab

When you **PHYSICALLY RECEIVE** a COVID-19 vaccine inventory shipment for any COVID-19 vaccine type, you will want to **ADD THE INVENTORY** to your location's overall COVID-19 vaccine inventory. Processing your COVID-19 vaccine shipments correctly will ensure that your COVID-19 vaccine levels are accurate for your reporting.

*This process **DOES NOT** include processing inbound COVID-19 vaccine inventory transfers or redistributions. Please see the Receiving a COVID-19 Vaccine Transfer / Redistribution section for steps on how to process inbound transfers or redistributions.*

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



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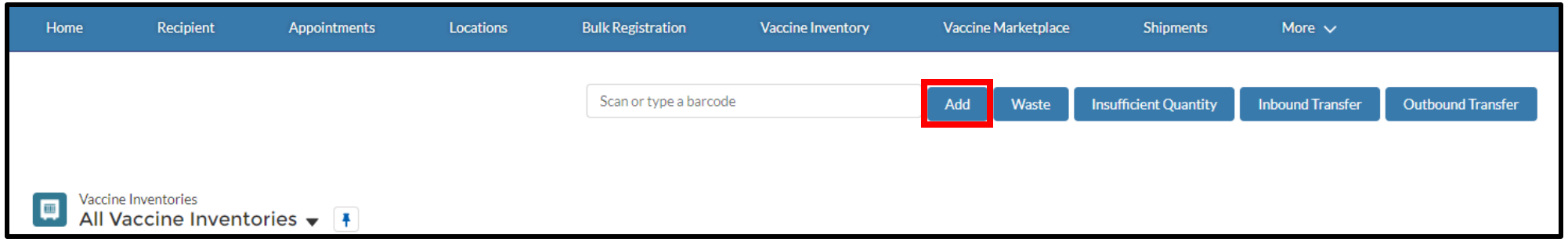
Step 2 of 6: Create a New Vaccine Inventory Record

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. This will be your main working page for ensuring that your inventory levels are accurate. See the **CVMS PROVIDER PORTAL INVENTORY DEPRECATION, TRANSFER, AND REDISTRIBUTION USER GUIDE at** [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19] to learn more about COVID-19 vaccine Wastage, Insufficient Quantities, and Redistribution / Transfer processes.

1. Click **ADD**
2. After clicking add, you will be prompted to **PROVIDE ADDITIONAL VACCINE DETAILS**



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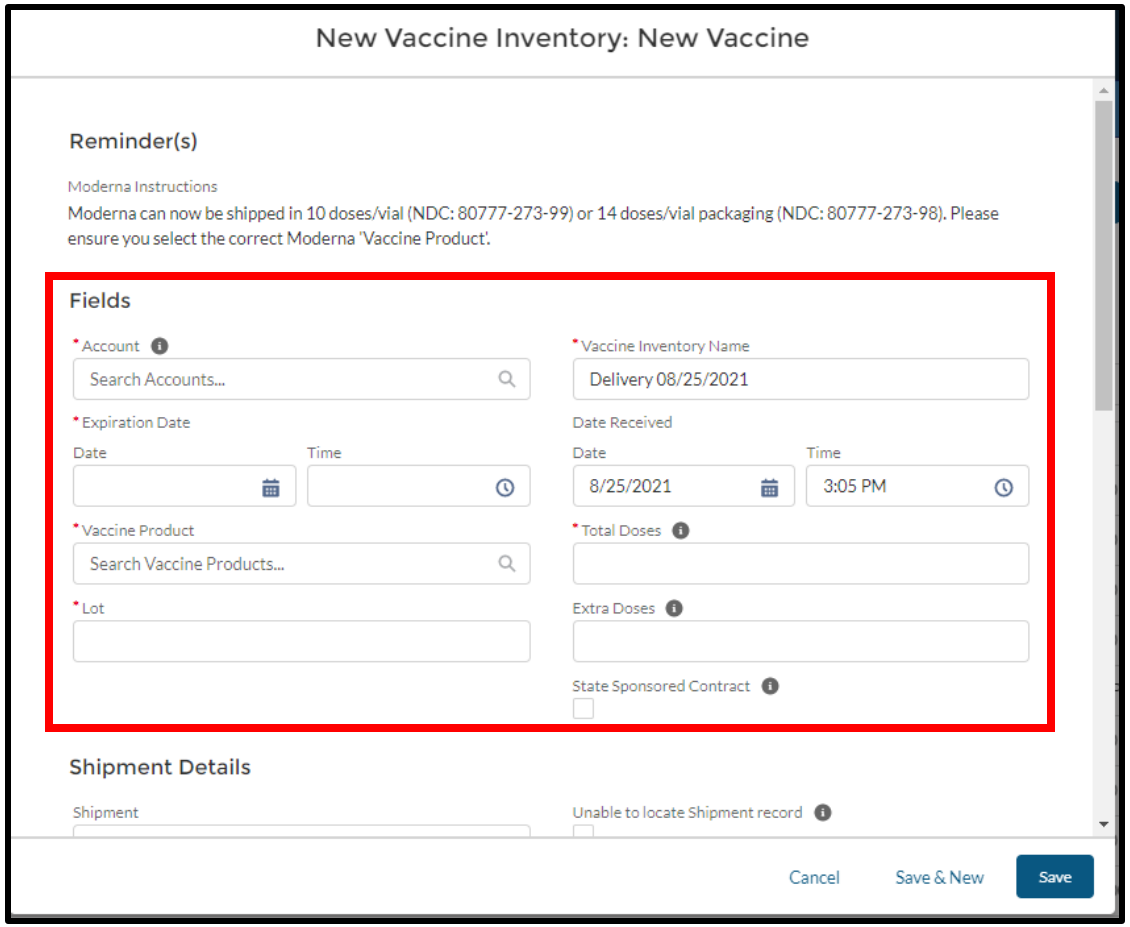
Tips

By Default, the view is set as “Recently Viewed”, therefore the list will seem empty at first.

Change the view to “All Vaccine Inventories” and click the THUMBNAIL icon to PIN your favorite list view.

Step 3 of 6: Enter Vaccine Inventory Information



For more information on Extra Doses, see page 20, **'Entering Extra Doses'**.

The **NEW VACCINE INVENTORY PAGE** will appear.

To search for a picklist value, you need to enter at least **THREE CHARACTERS.**

1. Populate all required **VACCINE INVENTORY FIELDS**
   - Account (Do not create a new Account)
   - Vaccine Inventory Name *(editable)*
   - Expiration Date
   - Date and Time Received
   - Vaccine Product
   - Total Doses
   - Lot #
   - State Sponsored Contract
2. Continue to **SHIPMENT DETAILS**

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Tips

When adding Inventory into CVMS, we recommend including the Lot #s in the Inventory Name to help staff that are administering vaccines to recipients to more easily choose the correct Inventory record.

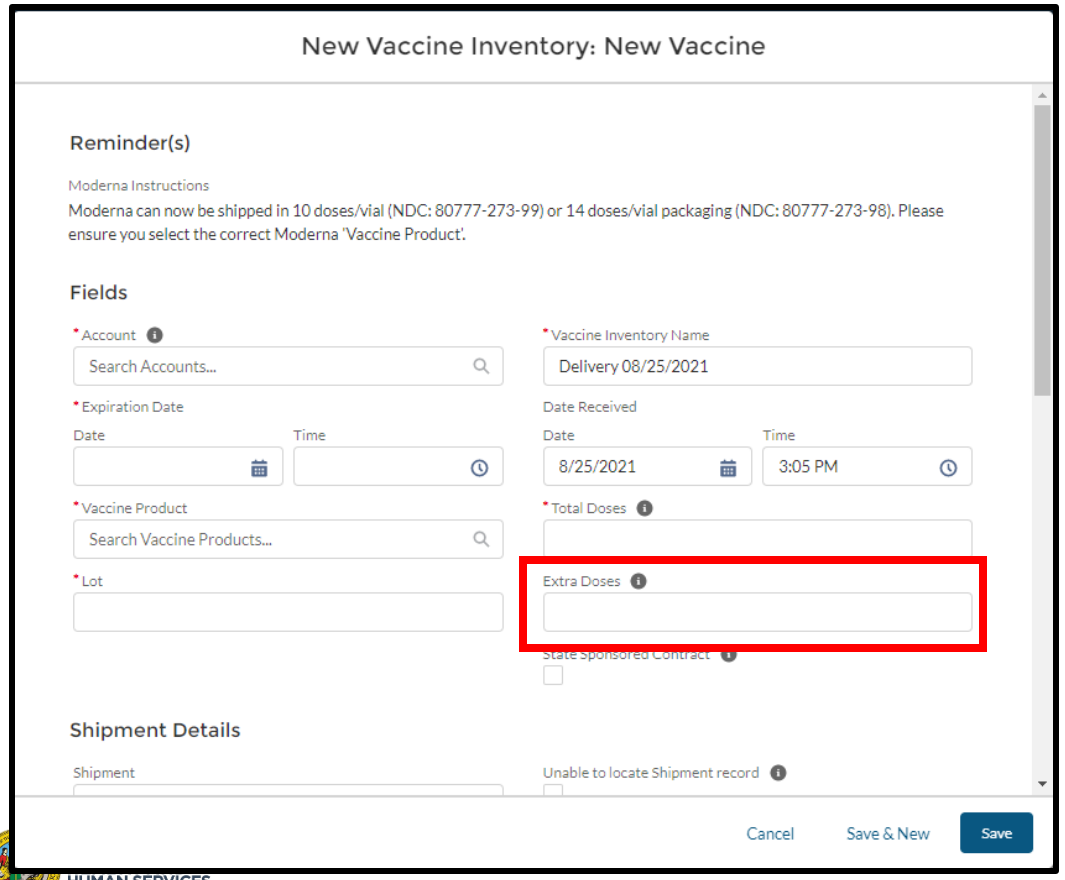
Shipments from **DIFFERENT LOT NUMBERS** must be entered as separate Inventory records.

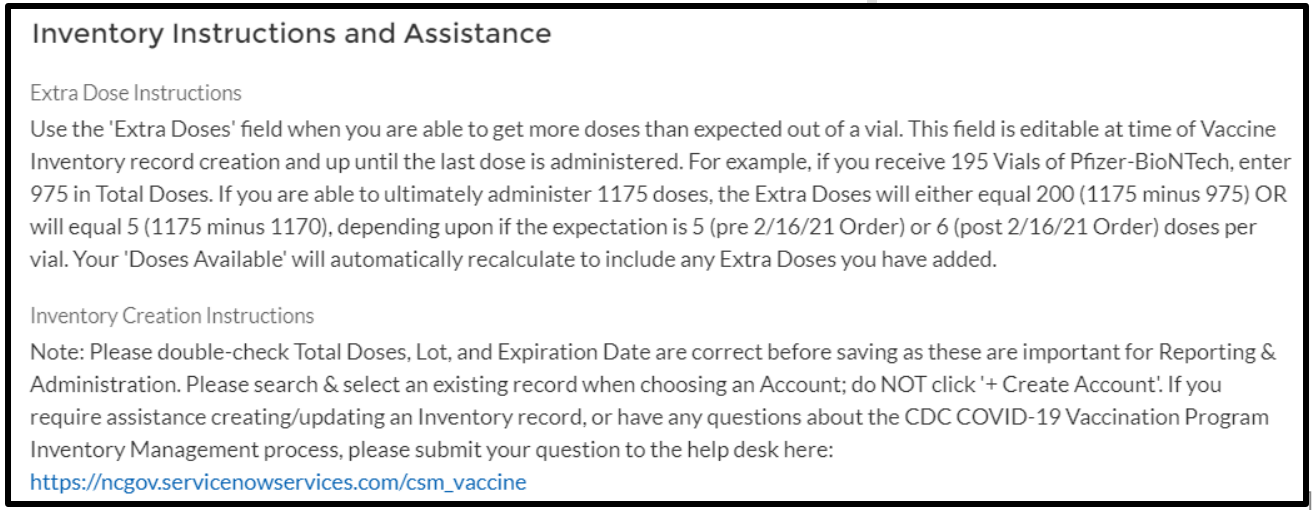
Step 4 of 6: Entering Extra Doses

If you know you will have extra doses, you can update the **EXTRA DOSES** field. You will be able to update this field later to reflect the actual number of extra doses administered.

For an example on when to record **EXTRA DOSES**, please see the **INVENTORY INSTRUCTIONS AND ASSISTANCE** image below.

Note: The CDC has directed that the Pfizer 6 dose vials should never have an extra dose.





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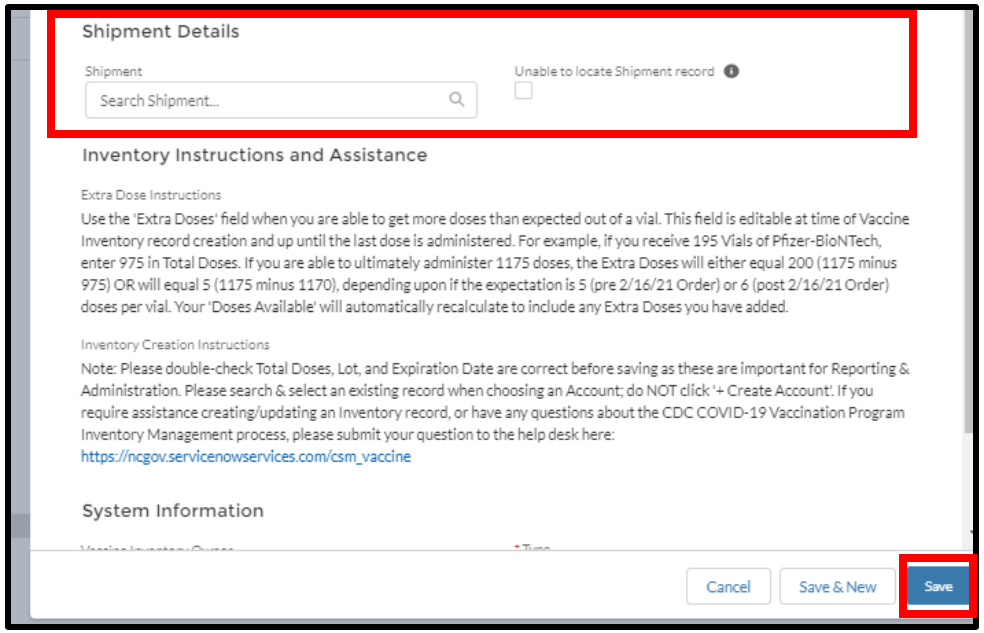
Healthcare Location Manager

Tips

The Extra Doses field is editable at time of Vaccine Inventory record creation and up until the last dose is administered.

It is recommended that you enter extra doses as they happen instead of at the time of record creation.

Step 5 of 6: Enter Shipment Details



You can now enter the remaining Vaccine Shipment record details.

Do **NOT** reduce the **TOTAL DOSES AMOUNT** if you have wastage or plan to redistribute inventory.

This process **MUST** be recorded separately as **INVENTORY DEPRECATION**.

1. Select a **SHIPMENT RECORD**
2. If you cannot locate the Shipment record, **CHECK** the **UNABLE TO LOCATE SHIPMENT RECORD** box
3. Before saving, **REVIEW** all entered details
4. Click **SAVE**

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Tips

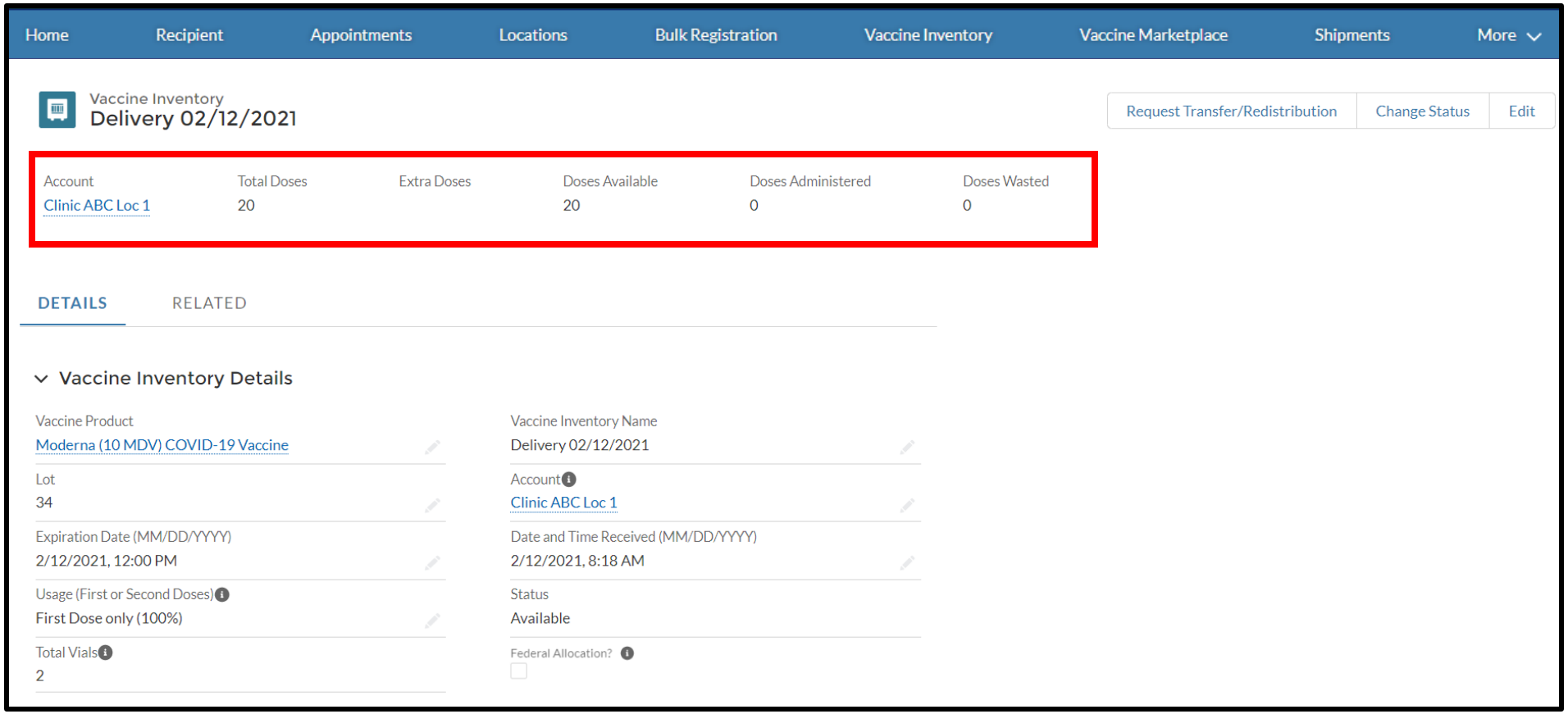
You may click SAVE & NEW to process / add additional Vaccine Inventory records.

Vaccine Pfizer products Ordered on or after January 26 should be logged as the 6 doses/vial Pfizer product (not 5) so that inventory is being tracked per more recent guidance from the CDC. Vaccine Pfizer products Ordered before January 26 should be logged as the 5 doses/vial Pfizer product.

Step 6 of 6: Review the Vaccine Inventory Record

After clicking save, you will be directed to the **VACCINE INVENTORY RECORD**. Your total COVID-19 vaccine inventory has now been updated to reflect this additional inventory.

At the top of the record, your **VACCINE INVENTORY HIGHLIGHT PANEL** will reflect ongoing **DOSAGE ACTIVITY** for this inventory.



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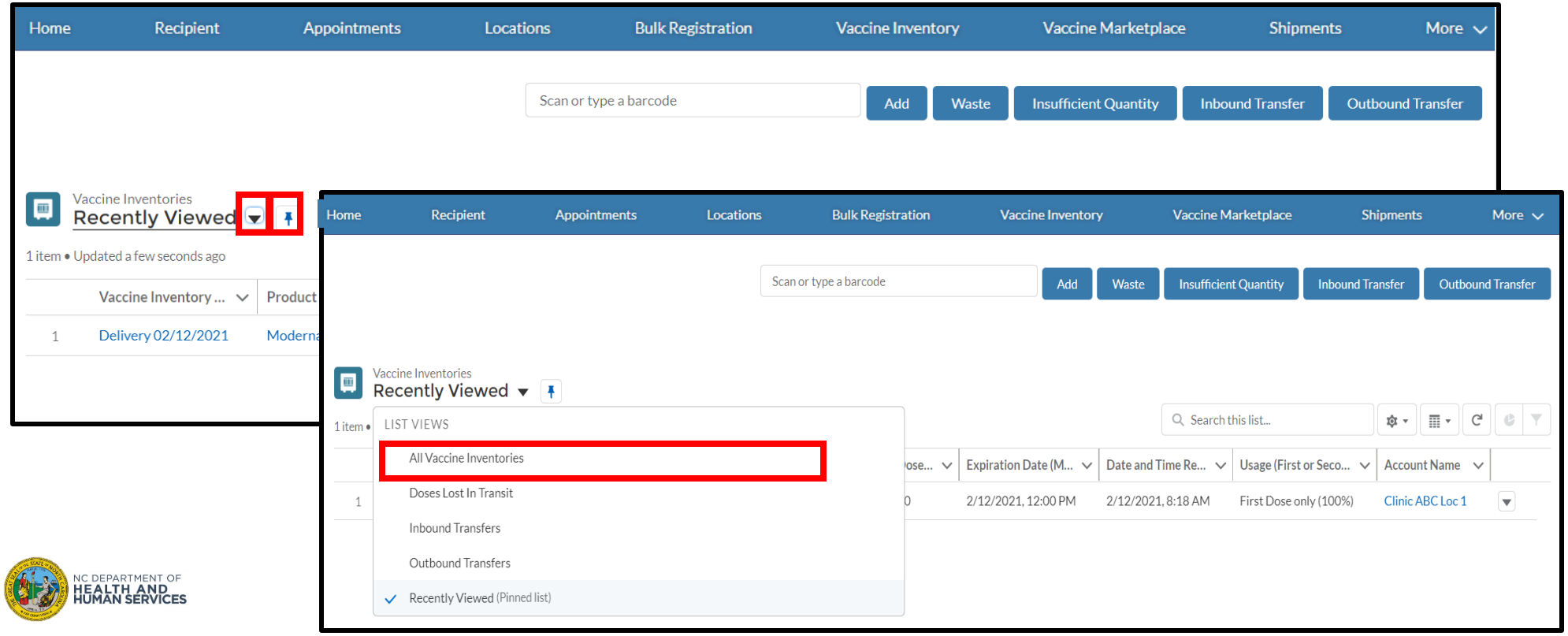
Tips

Review the Highlight Panel at the top of the Vaccine Inventory Record.

Switch Inventory List Views

You will see a **LIST VIEW** on the vaccine inventory page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed List View. To see all your Inventory Records, you will have to switch to the All Vaccine Inventories list view. You will be able to switch back and forth between list views.

1. Click the **DROP-DOWN MENU** next to the list view name
2. Click **ALL VACCINE INVENTORIES**
3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**



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Tips

Click the THUMBNAIL icon to PIN your favorite list view.

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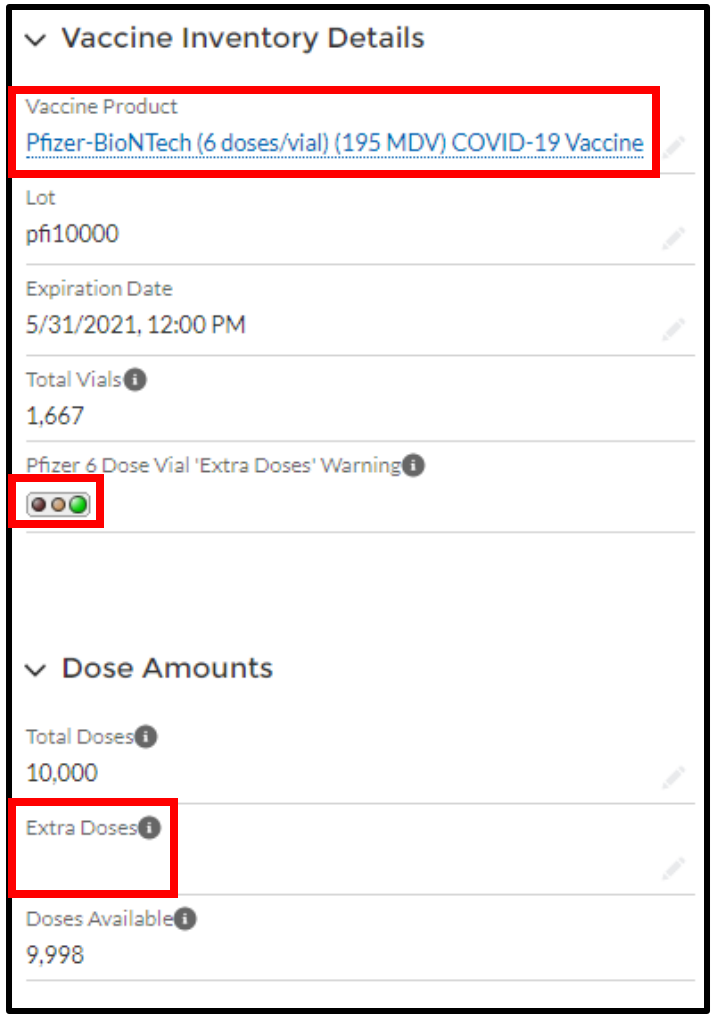
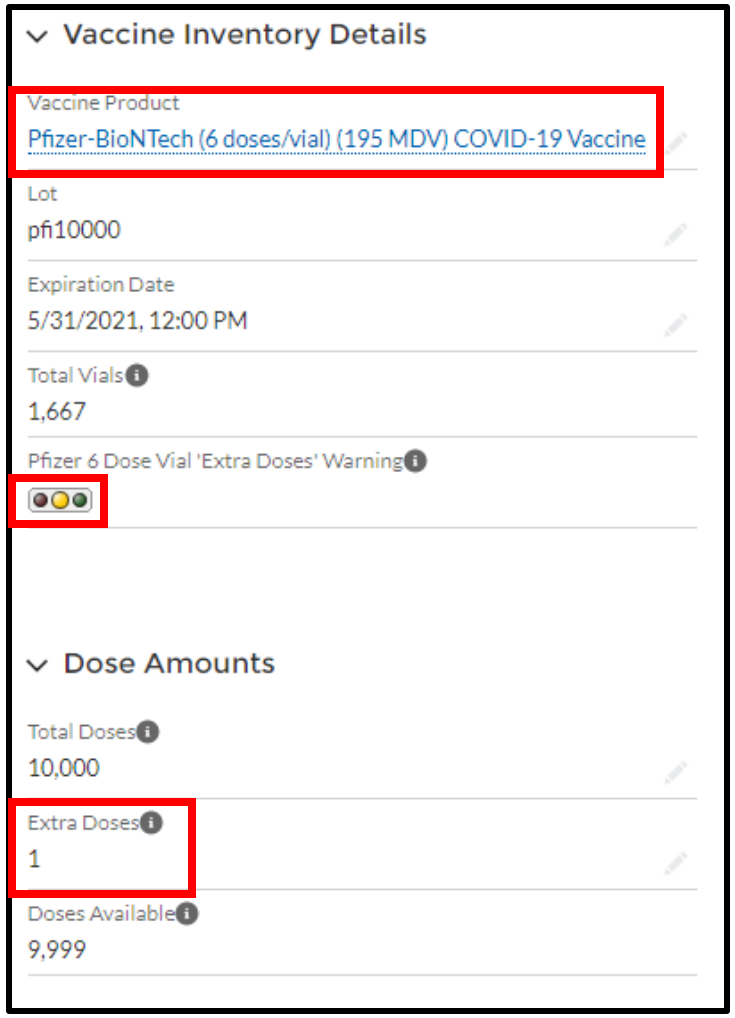
Special Attention to the Pfizer 6-dose Vial Control

Due to the nature of the Pfizer 6-dose vial, extra doses are not allowed by the CDC. Though CVMS will still allow you to enter an extra dose for any vaccine inventory, you will receive a yellow traffic light visual alert for any Pfizer 6-dose product inventories if you attempt to add extra doses.





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Tips

If extra doses were previously annotated, do not try to remove them. All extra doses and wastage events should be entered at the time of the event.

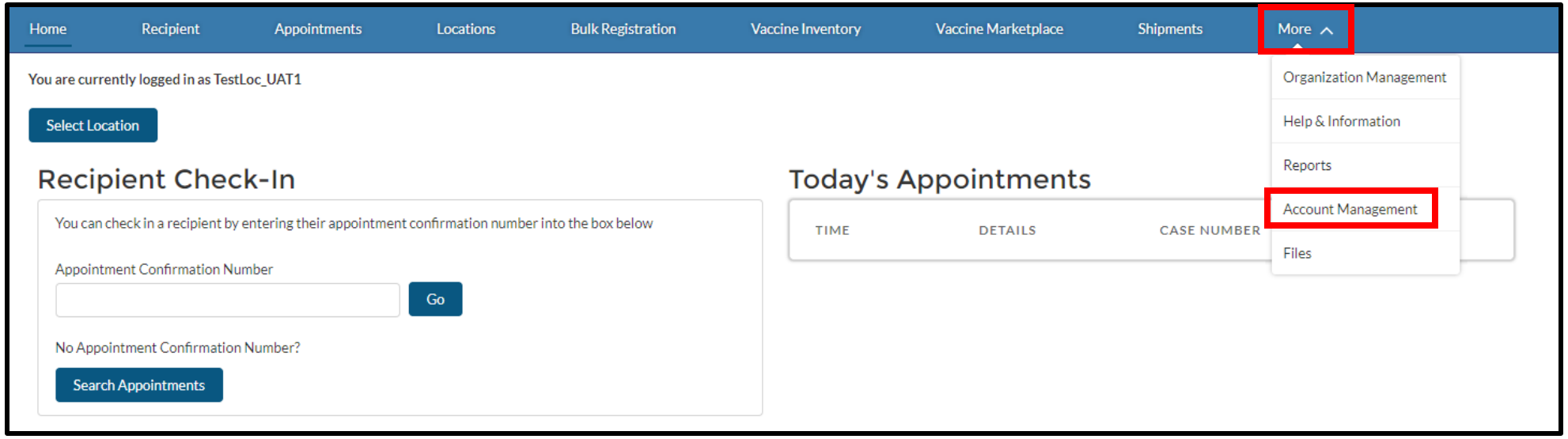
Declare Availability for More Allocations by the State

Step 1 of 5: Navigate to the Account Management Tab

You will be able to adjust your availability to receive COVID-19 vaccine inventory each week for your location in the CVMS Provider Portal. It is important that you **UPDATE YOUR AVAILABILITY BY MONDAY AT 10:00 AM EACH WEEK** if you want your adjustment to be considered for vaccine allocation planning.

If you indicate **YES**, that means your location is able to receive COVID-19 vaccine inventory that week if allocated. If you indicate **NO** because you do not have storage or capacity, your location will not be allocated COVID-19 vaccine inventory until you update your preference.

1. Navigate to the **MORE** Tab and select **ACCOUNT MANAGEMENT**



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Tips

If you have multiple locations, make sure to update each location's Allocation Availability each week as appropriate.

You can also get to the Account Record (Location) from the Vaccine Inventory tab and clicking on the Account Name (Location) field from any row of vaccine inventory records or from the Locations Tab. However, only accounts with available inventories will show using those methods.

Step 2 of 5: Search for the Location Manager (You)

1. Type the Location Manager's name (your name) in the **SEARCH BY CONTACT'S NAME OR NCID**
2. Click **SEARCH**

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

Instructions for Healthcare Provider Bulk Upload

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

Drag and Drop CSV file here

Add Member

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

Check this box to search for all contacts (including contacts not at my location)

Search | Reset

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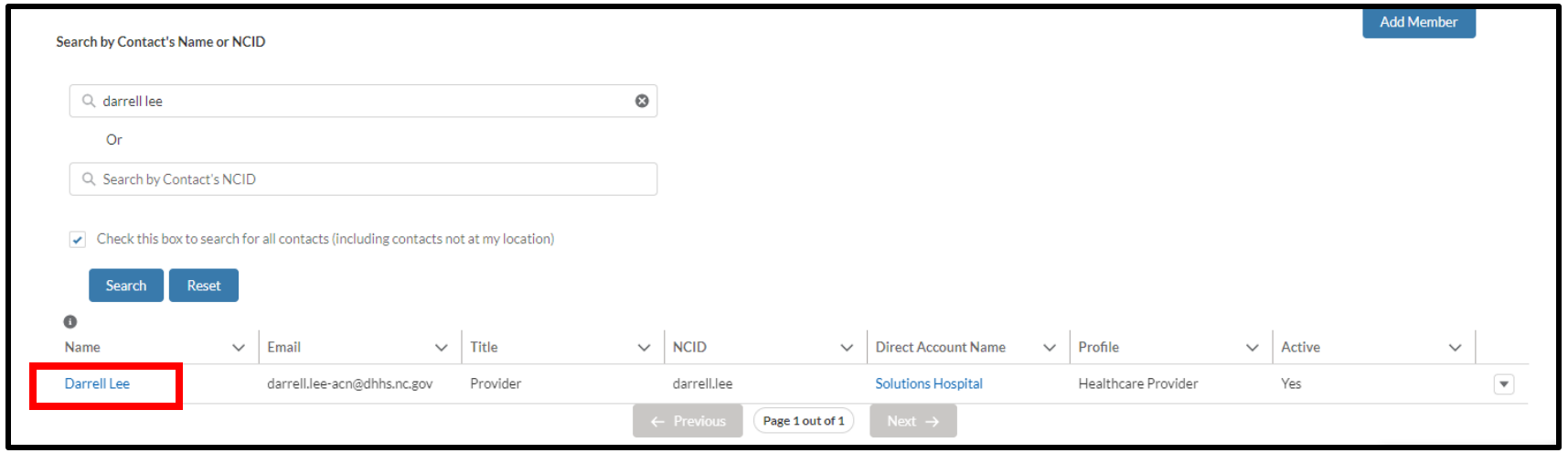
Step 3 of 5: Open Your Record

1. Click on your name to open the record



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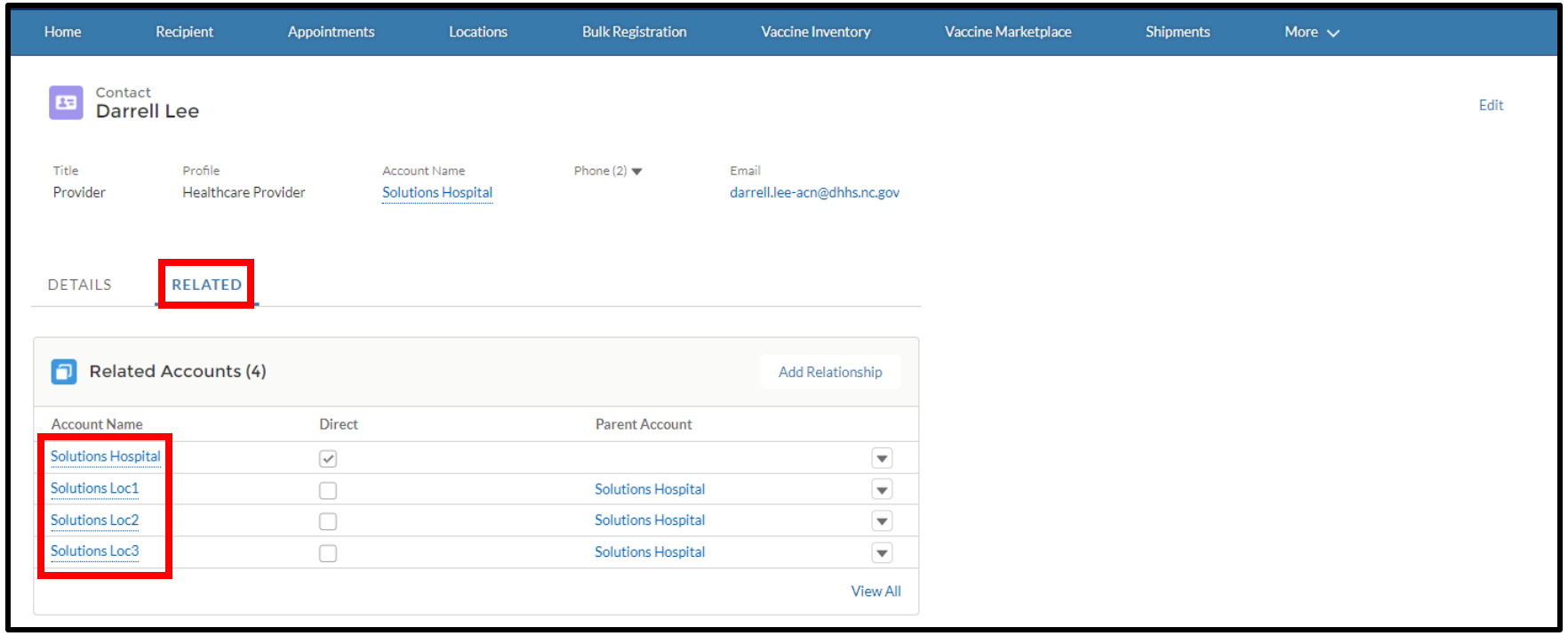
Step 4 of 5: Select Each Account from the Related Tab

1. Navigate to the **RELATED** tab
2. Click on the appropriate account



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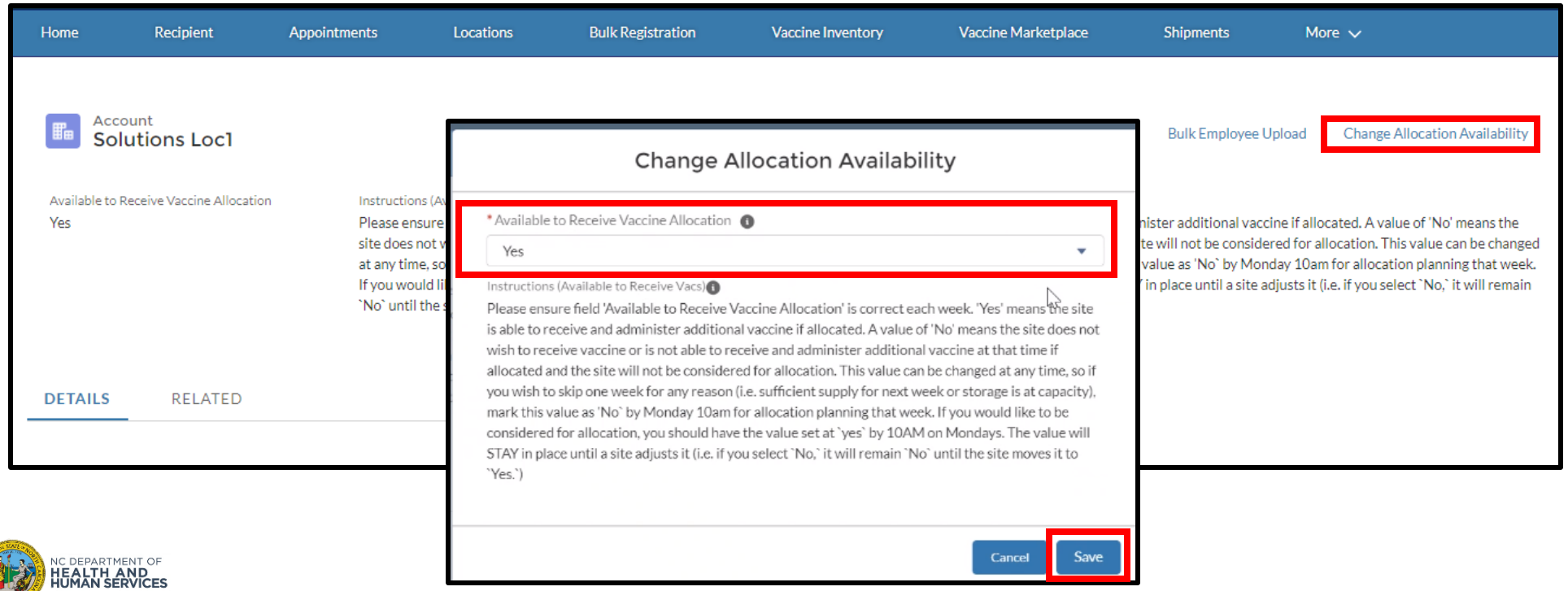
Step 5 of 5: Update Your Location's Availability to Receive COVID-19 Vaccine Inventory

From your Account Record, you can use the **CHANGE ALLOCATION AVAILABILITY** button to certify that your location is able or unable to receive and administer additional vaccine if allocated. This **VALUE DOES NOT RESET OR AUTOMATICALLY UPDATE EACH WEEK.** It will remain the same as the last updated value until you change it.

1. From the Account Record, click the **CHANGE ALLOCATION AVAILABILITY** button
2. Select **YES** or **NO** from the drop-down menu
3. Click **SAVE**



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Tips

Once you select Yes or No for a location, this selection will remain until you change it.

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Exchanging Vaccines Through the Vaccine Marketplace

What is the Vaccine Marketplace?

The "Vaccine Marketplace" enables providers to self-identify and match COVID-19 vaccine needs with other providers; this feature supports the transfer of COVID-19 vaccine from **provider to provider**.

SUPPLY

Providers with extra COVID-19 vaccine doses can:

- Search the Vaccine Marketplace for a nearby provider in need of extra COVID-19 vaccine doses
- If provider is identified, contact is made via phone or email
- If provider is not located, a Marketplace post of extra dose availability can be created

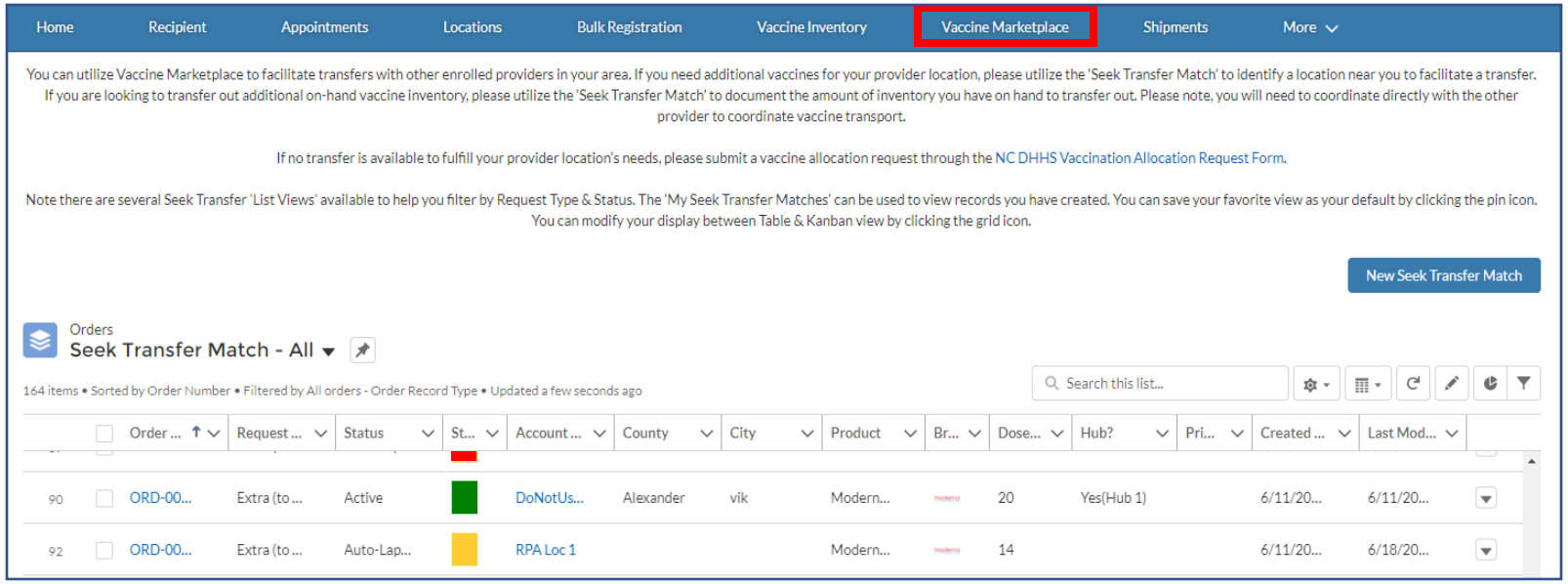
DEMAND

Providers seeking extra COVID-19 vaccine doses can:

- Search the Vaccine Marketplace for a nearby provider offering extra COVID-19 vaccine doses
- If provider is identified, contact is made via Marketplace inquiry
- If provider is not located, contact Hub for assistance

Once providers reach an agreement on moving COVID-19 vaccine doses, the existing transfer process in the CVMS Provider Portal is followed to complete the transaction.

Search and Post Request in the Vaccine Marketplace



All Users with a Healthcare Location Manager Profile have access to the Vaccine Marketplace via **the Vaccine Marketplace tab.**

You can **search** other providers in your area with extra inventory ready to transfer out *and* providers near you can create inquiries about your available inventory.

Hubs will also use the Vaccine Marketplace to list the Extra Doses they have at hand.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

What is a Hub?

What is a Hub?

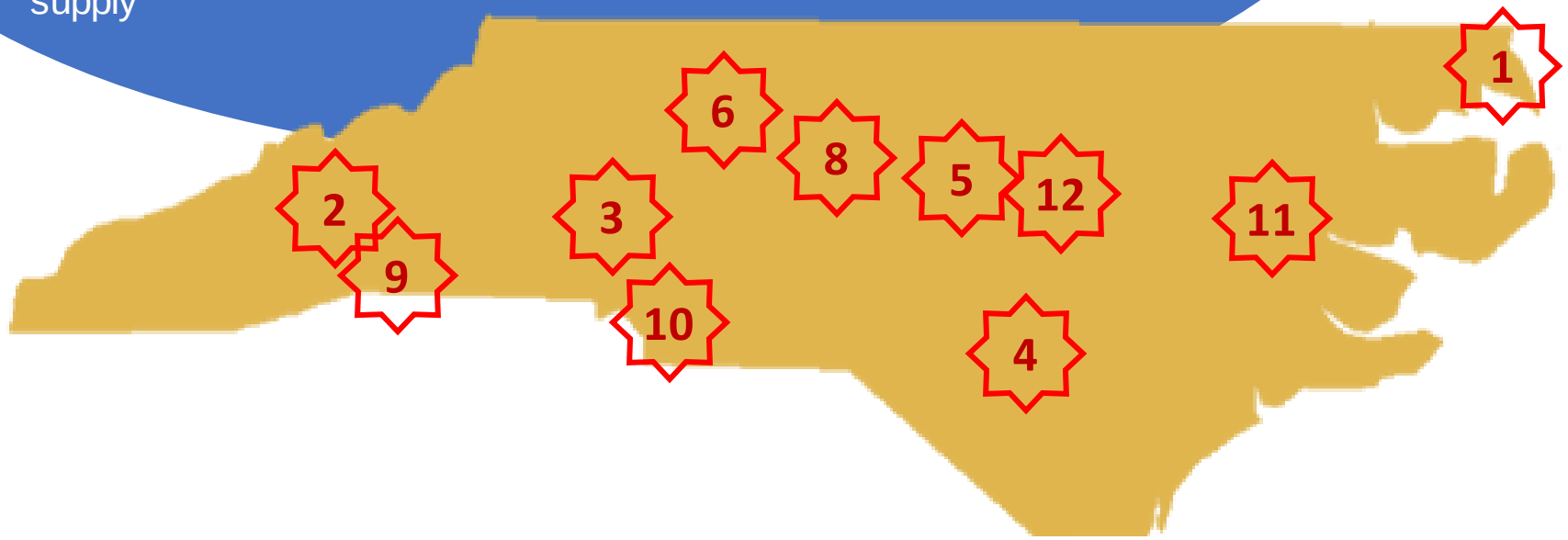
- Hubs are locations contracted by NCDHHS to serve as COVID-19 **vaccine repositories**. Hubs consolidate vaccine inventories that are dispersed among multiple providers.
- These designated Hubs are also able to deliver and/or facilitate COVID-19 vaccine pickups if a transfer is requested.

Which Hub should you contact?

- Contact your assigned Hub (see "Find your associated Hub" in this document), or the Hub closest to your location
- Filter the Vaccine Marketplace on your Hub to check their supply

Hub 1	Currituck County Health Department	Currituck
Hub 2	Buncombe County Health and Human Services	Buncombe
Hub 3	Catawba County Public Health	Catawba
Hub 4	Cumberland County Health Department	Cumberland
Hub 5	Durham County Health Department	Durham
Hub 6	Forsyth County Health Department	Forsyth
Hub 8	Moses H. Cone Memorial Hospital	Guilford
Hub 9	Henderson County Health Department	Henderson
Hub 10	StarMed Family & Urgent Care - Freemore	Freemore
Hub 11	Vidant Medical Center	Pitt
Hub 12	Wake County Human Services	Wake

*There is currently no Hub 7.



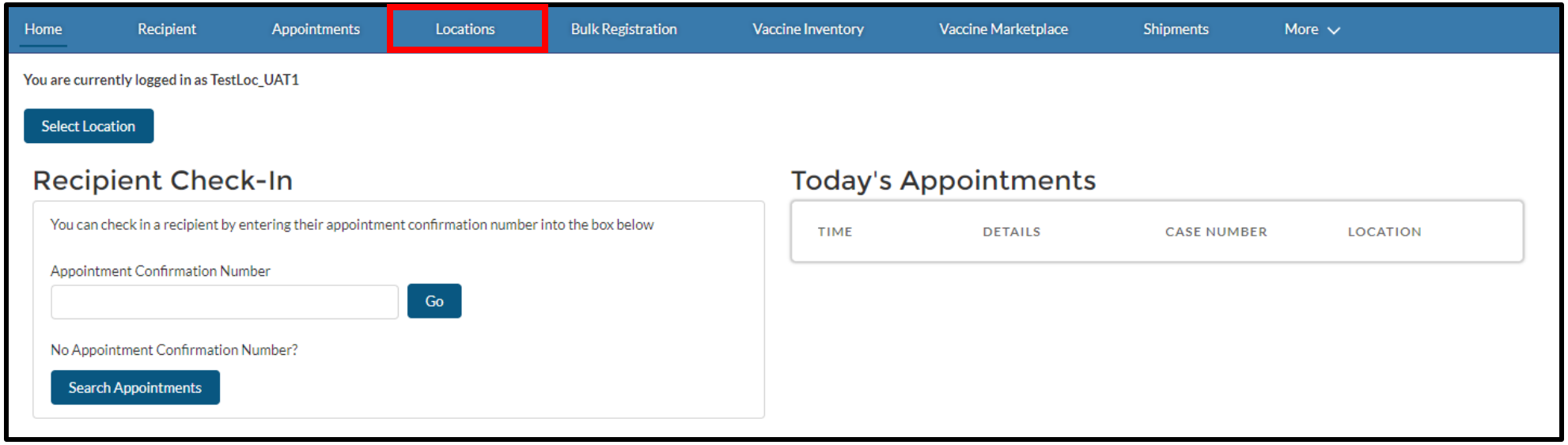
NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Find your Associated Hub

Step 1 of 3: Find Your Account Record

The NCDHHS team will assign COVID-19 vaccine providers to the different Hubs around the State. To locate your hub, follow these instructions.

1. Navigate to the **LOCATIONS** tab



Audience

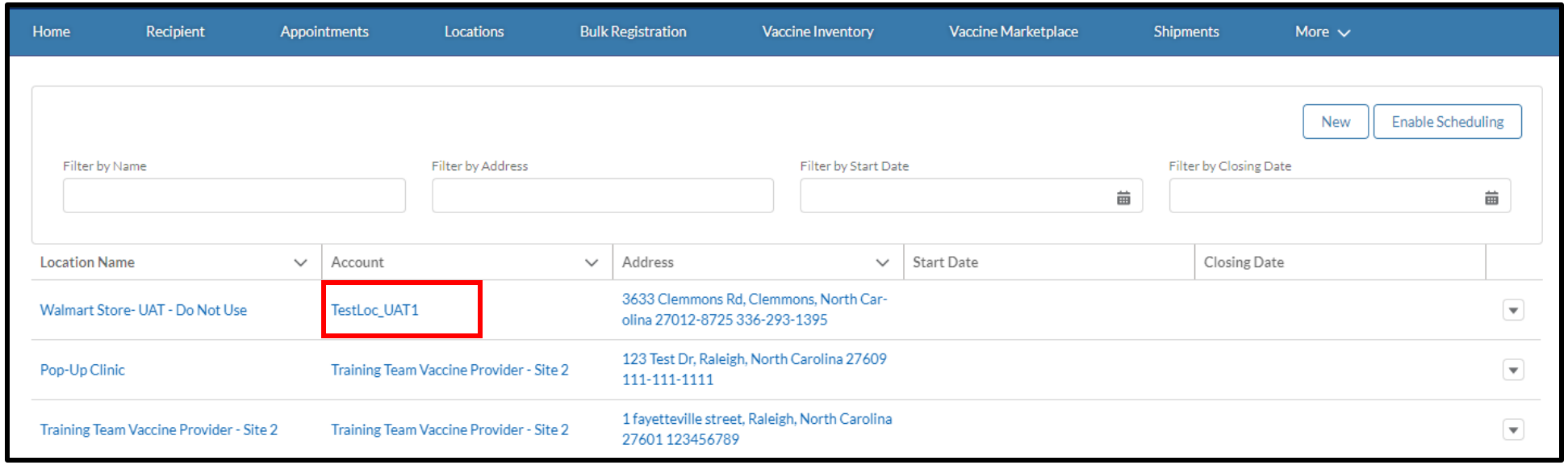
Healthcare Location Manager

Tips

Hubs are a central logistical point for receiving/sending existing surplus COVID-19 vaccines supply. Providers should coordinate with their assigned Hub to check availability before using the Vaccine Marketplace.

Step 2 of 3: Open your Location Account Record

1. Click on the **ACCOUNT NAME** (not on the Location Name)

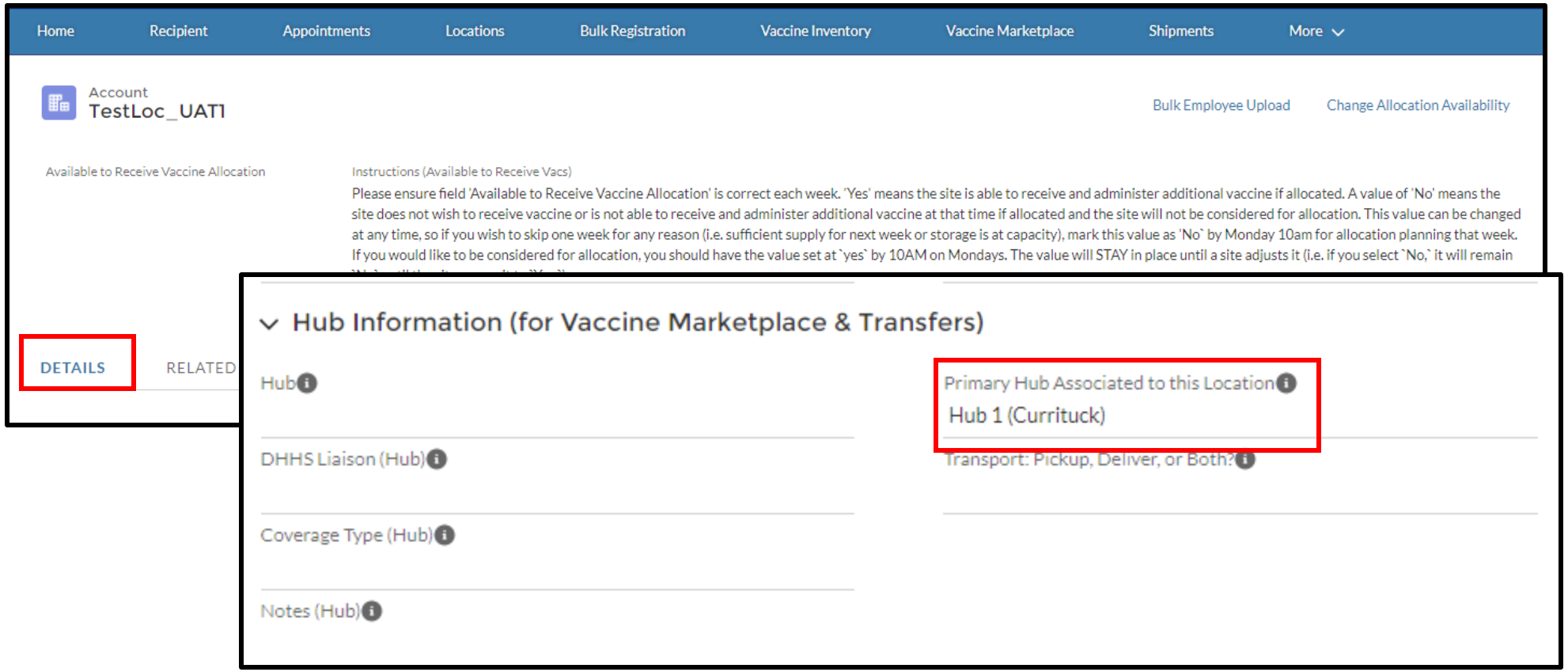


Audience

Healthcare Location Manager

Step 3 of 3: Find the Primary Hub Associated to Your Location

1. Select the **DETAILS** tab
2. Scroll to the bottom to view **HUB INFORMATION**
3. The Hub allocated to your location will appear under **PRIMARY HUB ASSOCIATED TO THIS LOCATION**



Audience

Healthcare Location Manager

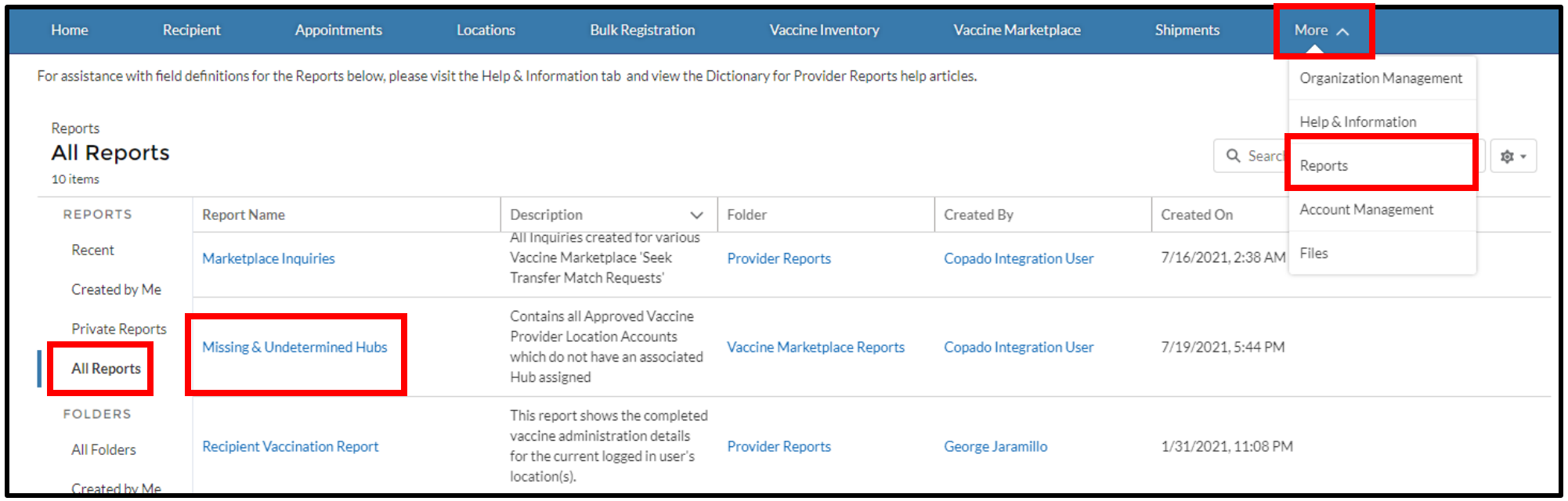
Tips

If your location is currently not assigned to a Hub, the field will be either empty or filled with **INDETERMINED**. If it is the case, feel free to contact the Hub of your choice to confirm if they can support you.

Accessing the Missing and Undetermined Hubs Report

The Missing and Undetermined Hubs Report displays Hub information for all accounts that are not associated with a Vaccine Marketplace Hub.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **MISSING & UNDETERMINED HUBS REPORT**



Audience

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Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal.

Accessing the Missing and Undetermined Hubs Report (Continued)

NCDHHS
CVMS Provider Portal

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

Report: Accounts
Missing & Undetermined Hubs
Contains all Approved Vaccine Provider Location Accounts which do not have an associated Hub assigned

Add Chart | Export

Total Records
2

	Description	Account Name	Primary Hub Associated to this Location	Provider PIN	Vaccine Administration County	Vaccine Shipping County	Parent Account	COVID-19 Vaccination Provider Type	Status
1	-	Solutions Loc2	-	2542	Alexander	-	Solutions Hospital	-	Resub
2	-	Solutions Loc3	-	456778	Ashe	-	Solutions Hospital	-	Appro

Audience

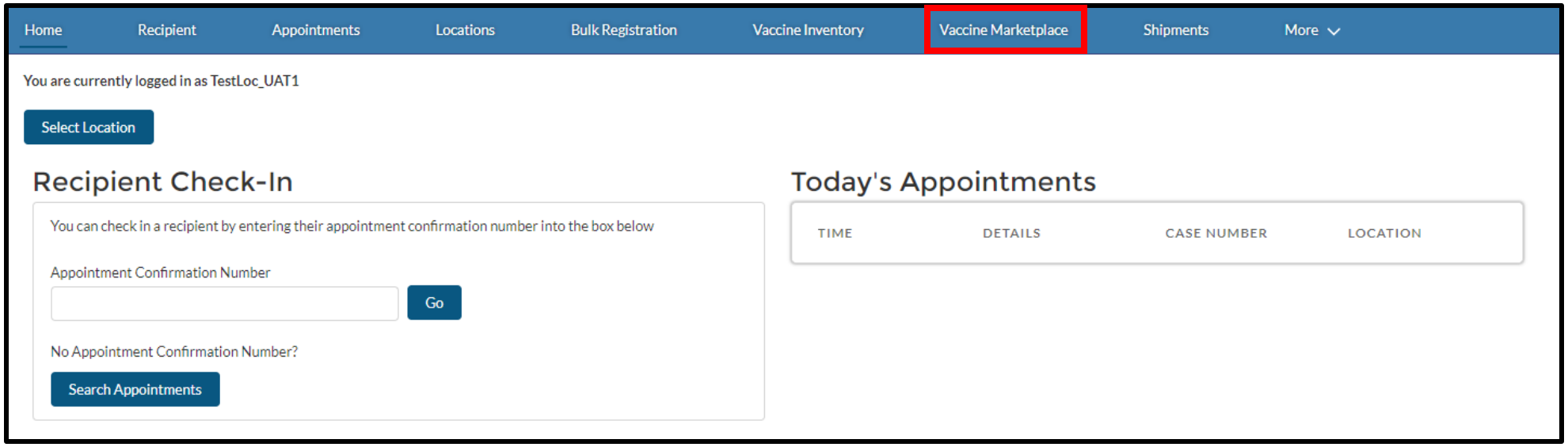
Healthcare Location Manager

Search for Existing Ads and Create an Inquiry

Step 1 of 8: Navigate to the Vaccine Marketplace

If you need additional COVID-19 vaccine doses, first check in the Vaccine Marketplace if your assigned Hub can support you.

1. At the top of your home page, click on the **VACCINE MARKETPLACE**



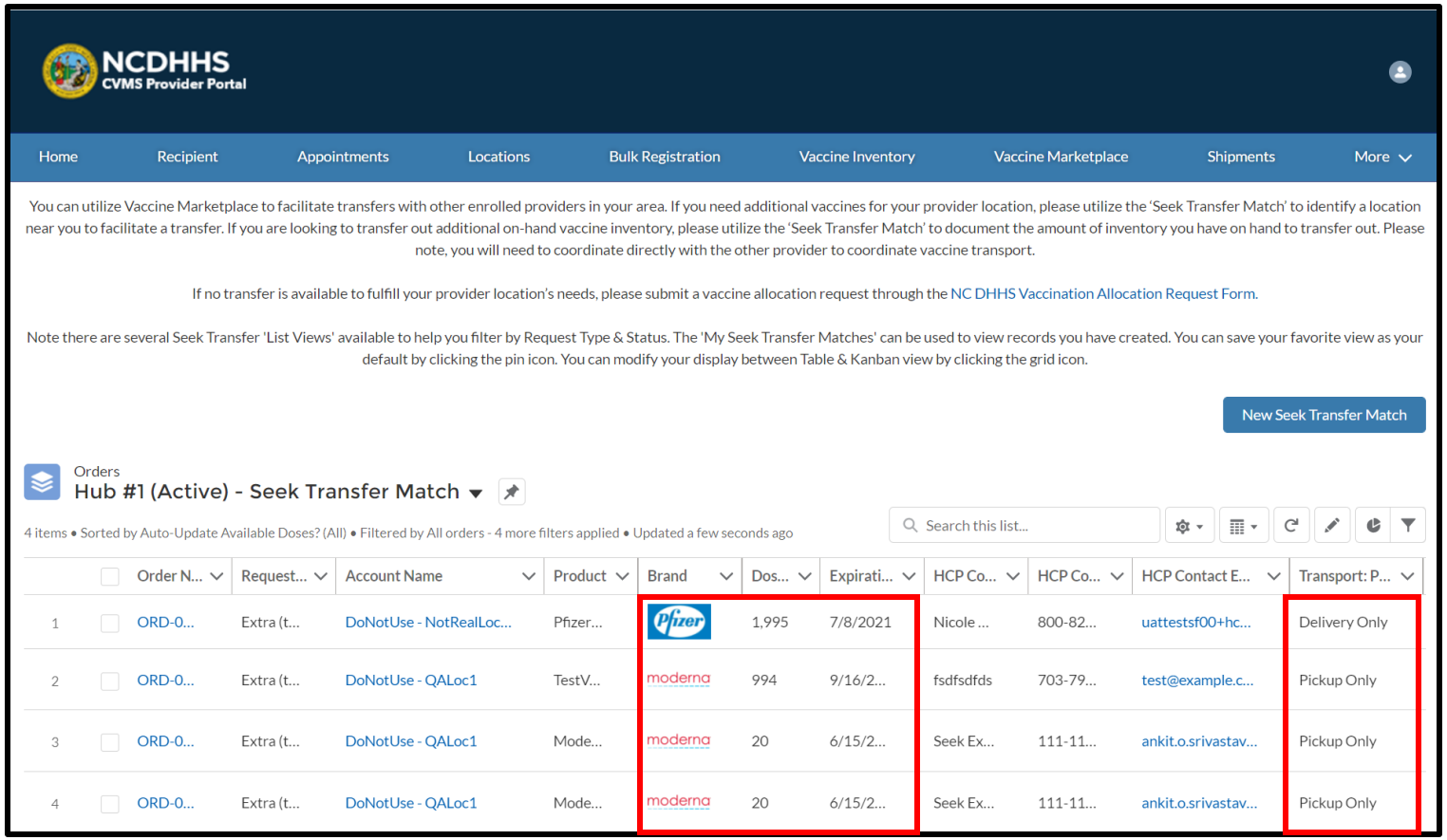
Audience

Healthcare Location Manager

Step 2 of 8: Check if your Assigned Hub is Offering the Vaccine you Seek

After sorting your results, navigate the list to find the inventory that appears to best suit your need.

1. Check the Brands, quantities available, Transport solution proposed by the Hub Location



Audience

Healthcare Location Manager

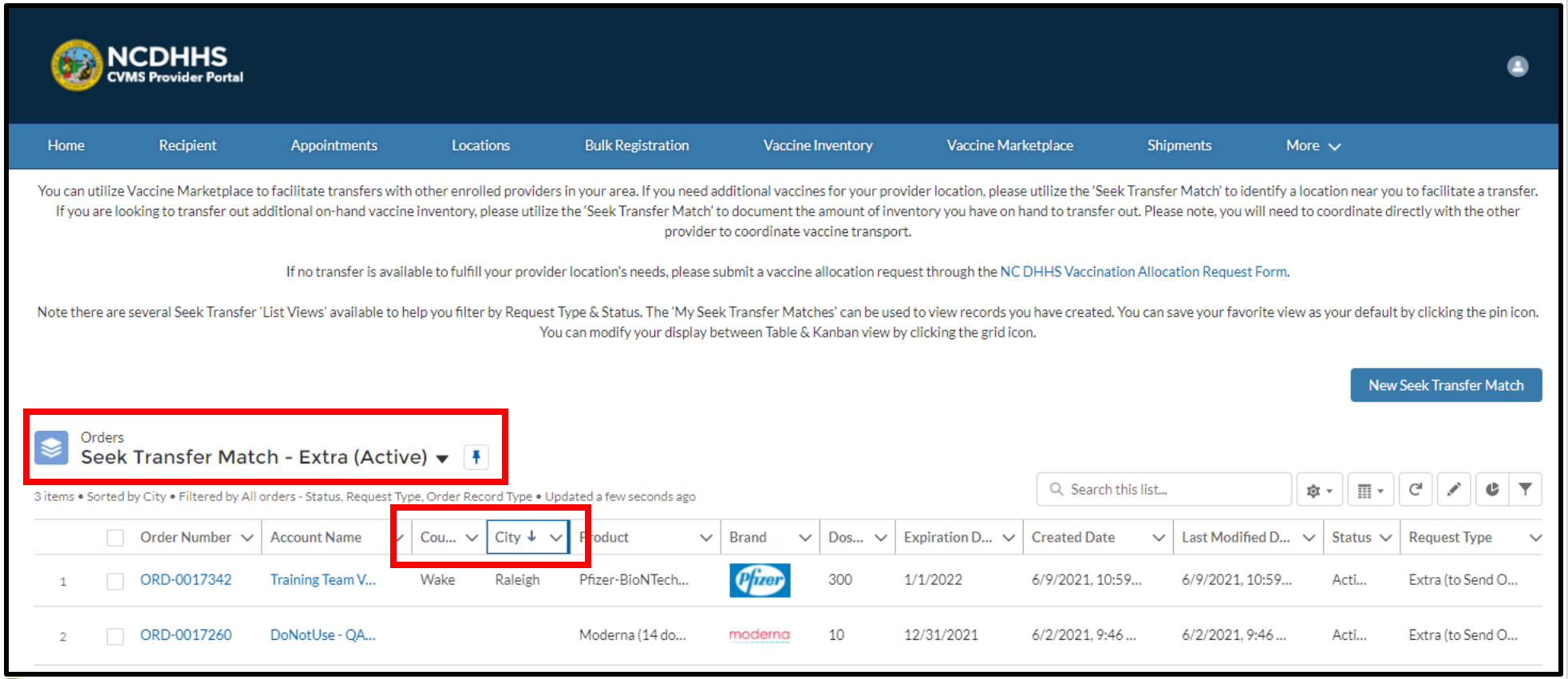
Tips

To always see the available and active requests posted by your assigned Hub, set the view to the correct **HUB#? (ACTIVE) - SEEK TRANSFER MATCH and** use the pin icon to set this as your default view.

Step 3 of 8: Sort Inventories by Location

If your Hub offers do not match your need, check listings posted by other providers near your location.

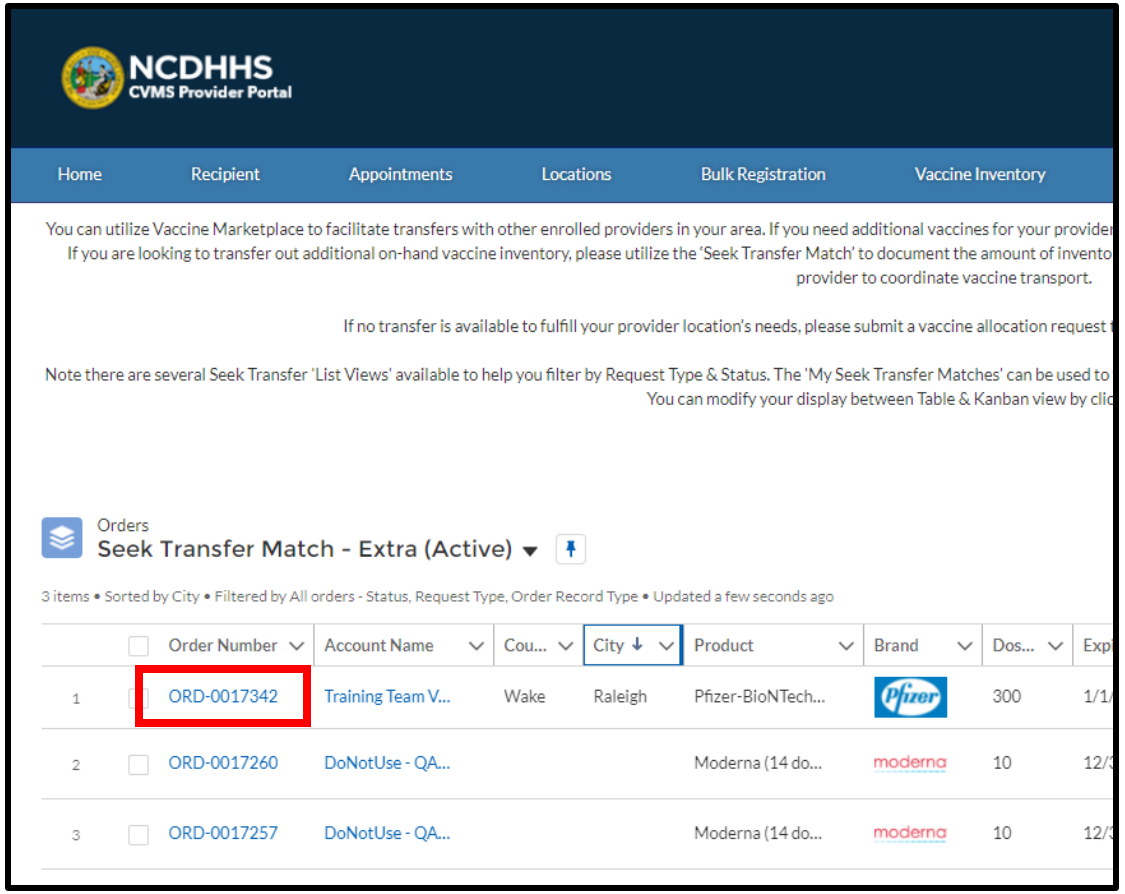
1. Filter the Vaccine Marketplace on **SEEK TRANSFER MATCH – EXTRA (Active)**
2. Click on the Header Row fields **CITY** or **COUNTY** to sort the records in ascending or descending order by location



Audience

Healthcare Location Manager

Step 4 of 8: Select the Request that Matches Your Need



After sorting your results, navigate the list to find the inventory that appears to best suit your need.

1. Click on the **ORDER NUMBER** associated with the request

Audience

Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 5 of 8: Review the Listing

Review the listing to see if it matches your needs.

NCDHHS
CVMS Provider Portal

Home | Recipient | Appointments | Location | Bulk Registration | Vaccine Inventory | More

Order
ORD-0019719

Create Inquiry | Edit | Clone

Account Name	Status	Product	Doses Available for Transfer
DoNotUse - NotRealLoc Hotfix 2	Active	Janssen COVID-19 Vaccine (Johnson & Johnson)	300

DETAILS | RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: https://covid19.ncdhhs.gov/media/2318/download?attachment
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Doses Available for Transfer Instruction

The 'Doses Available for Transfer' can be updated automatically or maintained manually. It is your preference & choice.

A) To have system automatically update, ensure 'Auto-Update Available Doses? (All)' is checked. The system will then utilize field 'Doses Available (Cumulative)', which is the sum of Available Doses across all Associated Vaccine Inventories. E.g. 'Associated Vaccine Inventory' has 100 Doses Available & 'Associated Vaccine Inventory 2' has 200 Doses Available. The system will show 300 Doses Available for Transfer

B) To manually maintain, ensure 'Auto-Update Available Doses? (All)' is NOT checked. You will need to enter & keep up-to-date the 'Doses (Number)' field.

You can change between auto-update & manually maintain at any time. Note that auto-update assumes all Available Doses on all Associated Vaccine Inventories are Available for Transfer. If only a subset of doses are Available for Transfer, you will need to maintain manually.

Seek Transfer Match Details

Request Type: Extra (to Send Outbound)	Order Start Date: 7/13/2021
Account Name: DoNotUse - NotRealLoc Hotfix 2	Status: Active
Doses (Number): 300	Status Indicator:
County: Wake	HCP Contact Name: Grace
City: cary	HCP Contact Phone: 555-555-5555
Additional Comments (Optional):	HCP Contact Email: gracewuat1+match2@gmail.com
Hub? Yes(Hub 1)	Primary Hub Associated to this Location?
Coverage Type? (Hub): Other (see Notes)	Transport: Pickup, Deliver, or Both? Pickup Only
	Inactivation Reason:

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory: Grace Janssen for Martketplace	Auto-Update Available Doses? (All)
Vaccine Product to Transfer: Janssen COVID-19 Vaccine (Johnson & Johnson)	Doses Available (Cumulative): 400
Expiration Date: 7/21/2021	Doses Per Vial (Number): 5
Lot Transferred: 550055	Sending Location Parent Account (Org): DoNotUse - NotRealOrg Hotfix 1

Additional Details if Wanted (To Receive Inbound)

Manufacturer

Audience

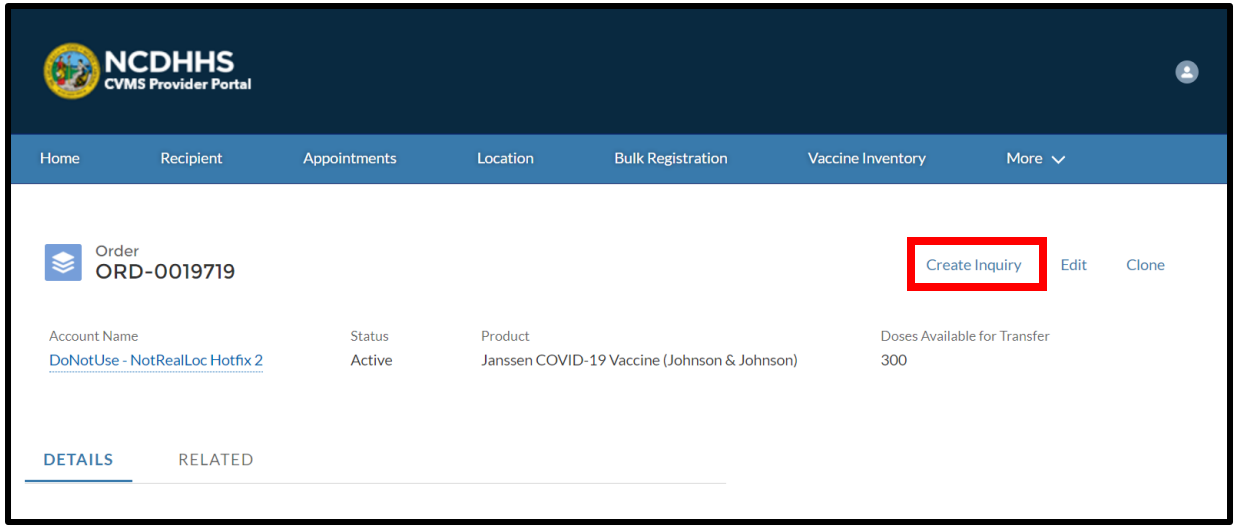
Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 6 of 8: Contact the Listing Author

If this listing is offering what you are looking for, you can contact the provider within the CVMS Provider Portal. The author of the listing will receive your message by email:

1. From the listing, navigate to the top of the page and click **CREATE INQUIRY**



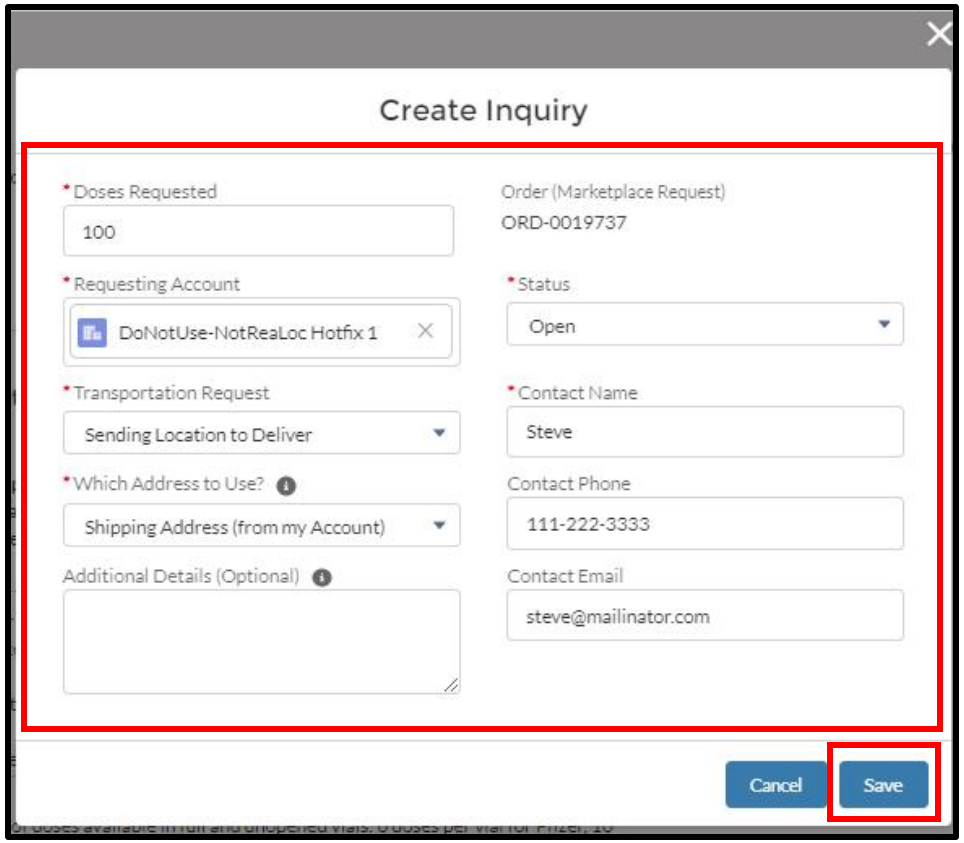
Audience

Healthcare Location Manager

Tips

It is possible to contact the listed HCP contact directly with the information provided on the Seek Transfer Match listing.

Step 7 of 8: Complete the Inquiry



1. Complete the following fields
   - Doses requested
   - Requesting Account
   - Status (should be set to **OPEN)**
   - Transportation Request
   - Contact Name
   - Address (can either select the address associated with the account or enter another address in the **ADDITIONAL DETAILS**)
   - Contact phone (optional)
   - Contact e-mail (optional)
2. Click **SAVE**

Audience

Healthcare Location Manager

Tips

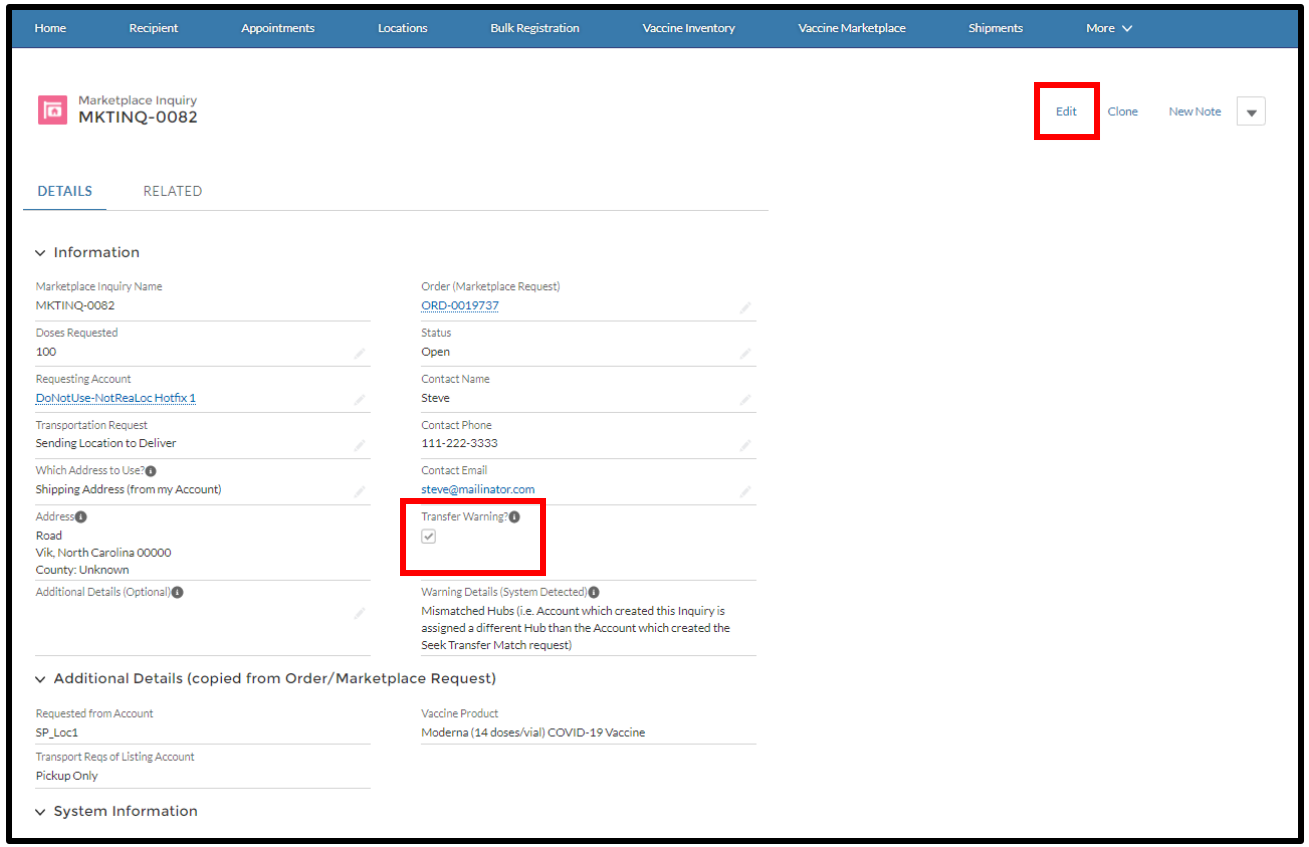
Use the **ADDITIONAL DETAILS** section to fully describe your needs.

Step 8 of 8: Review the Inquiry

Review your inquiry. Pay special attention to the **TRANSFER WARNING?** box. If checked, CVMS has determined that the inquiry is going to a provider not associated with the same Hub as your location. This only serves as a visual warning and will not prevent the inquiry or potential transfer for taking place. If any changes are needed, the inquiry can be edited by clicking **EDIT** in the upper right-hand corner.

Audience

Healthcare Location Manager

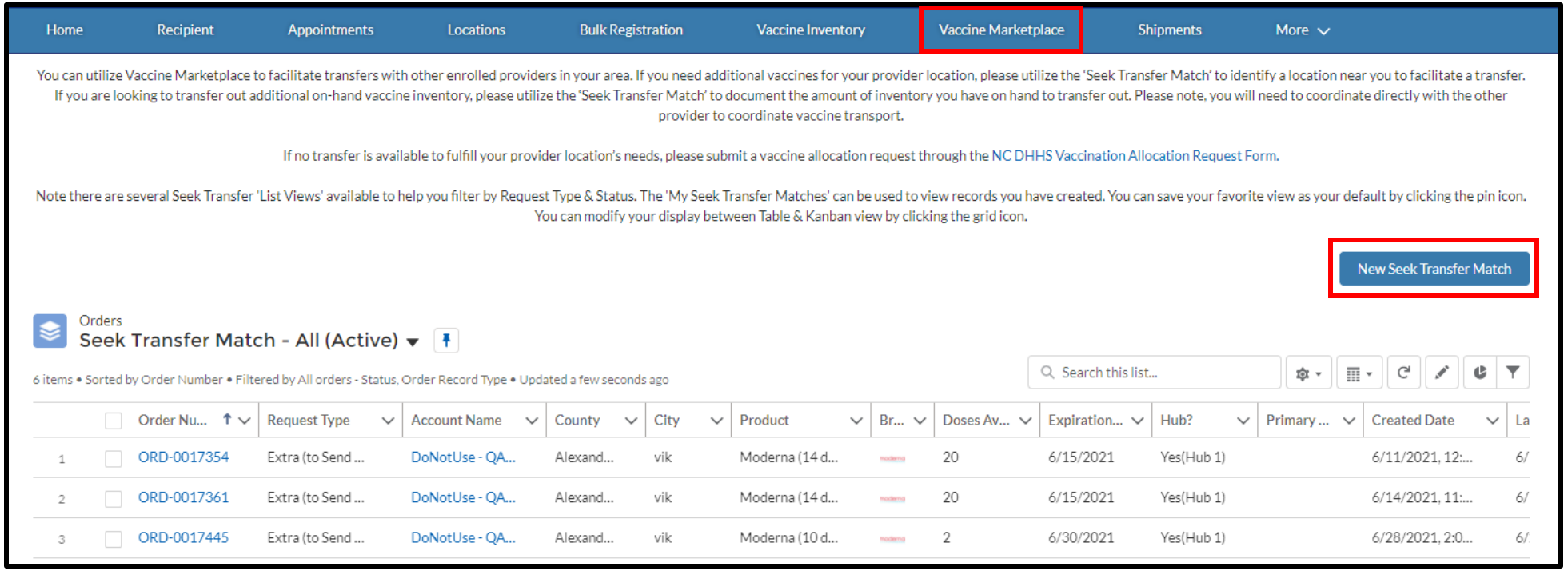


Offer your Vaccine Surplus

Step 1 of 4: Initiate a New Seek Transfer Match

If no provider is looking for the type of COVID-19 vaccine product you are offering, post an extra dose availability in the Vaccine Marketplace to let other providers know that you can support them.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Click on **NEW SEEK TRANSFER MATCH**



Audience

Healthcare Location Manager

Tips

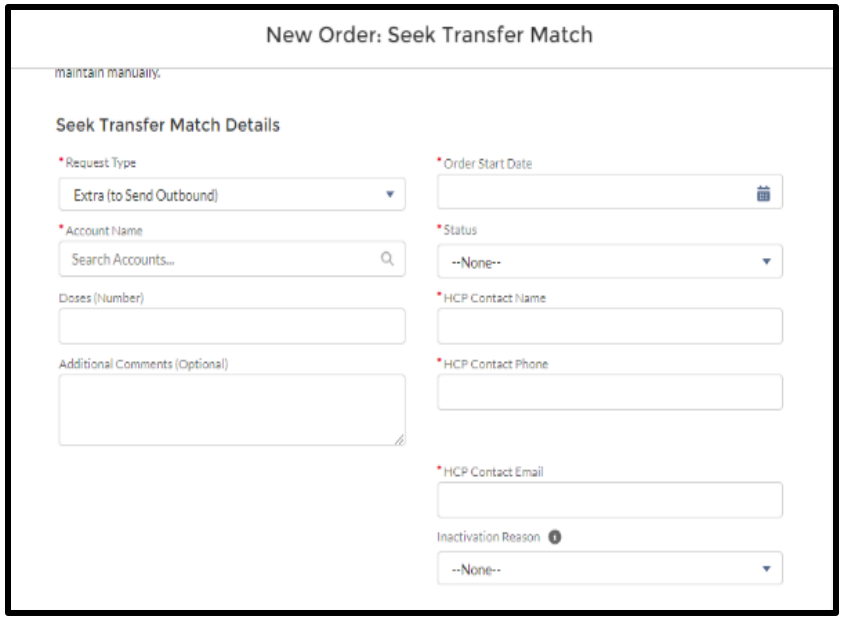
Before placing a Seek Transfer Match, it is recommended that you contact your associated Hub to discuss your needs.

Also, you can set the view to display active records associated with your Hub. It is recommended that you search first by Hub. However, this will only show active records. If you are unable to find an appropriate match, it is best to search all matches.

To always see the available and active requests, set the view to **SEEK TRANSFER MATCH – ALL**, and use the pin icon to set this as your default view.

.

Step 2 of 4: Start completing the “Seek Transfer Match” Form



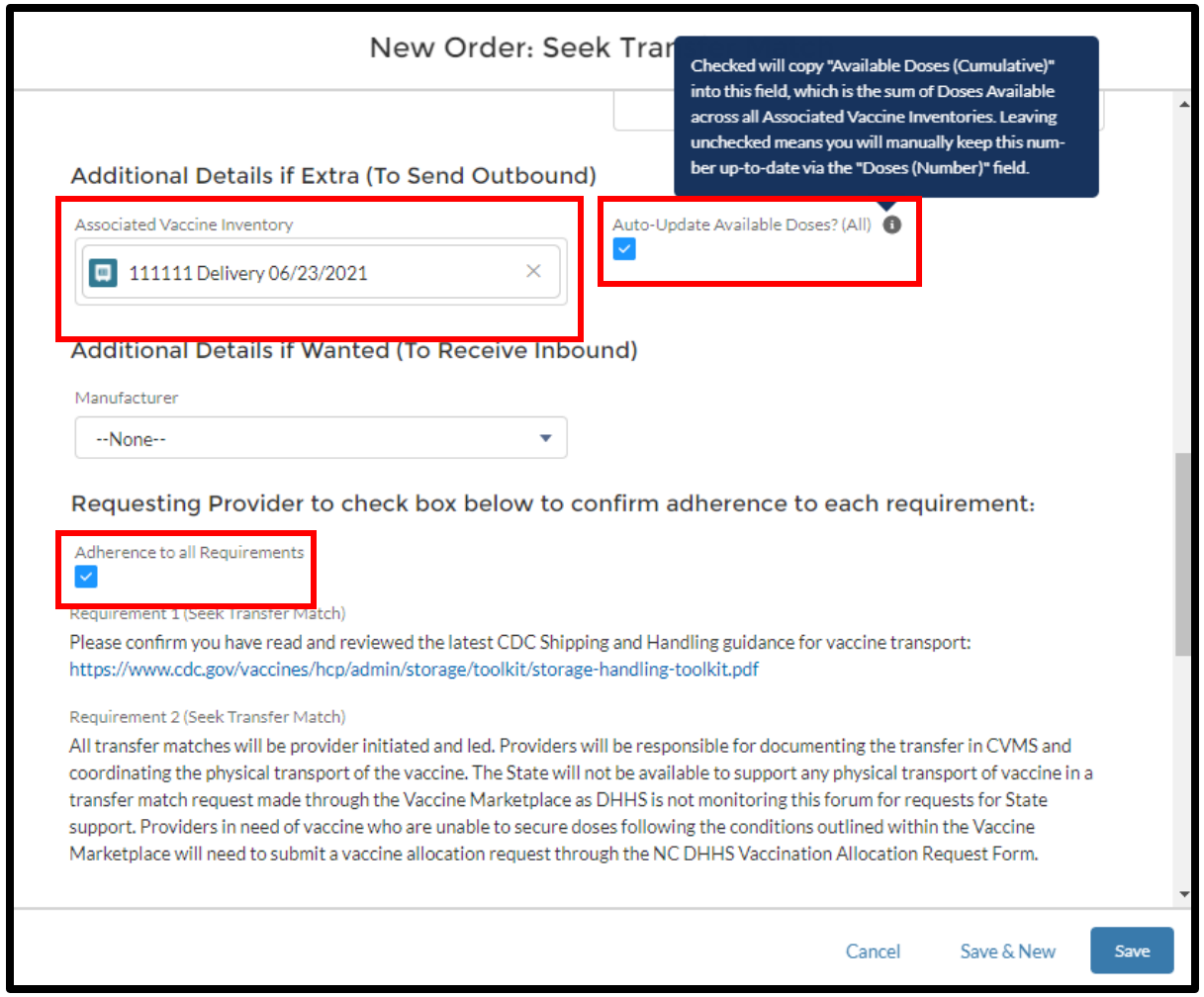
1. Read the instructions at the top of window
2. Complete the required fields:
   - **Request Type:** select “Extra (to Send Outbound)”
   - **Order Start Date:** enter today’s date
   - **Account Name:** select your location account name
   - **Status:** select **ACTIVE**
   - **Doses:** enter the number of doses you are offering
   - **HCP Contact Name/phone/email:** who to contact to agree on the transfer
   - **Additional Comments**: be as detailed as possible. For example, “These Extra doses of 400 doses are split over six separate inventories. Here are the number of doses per lot and expiration date: xxx – xx/xxxx”

Audience

Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 3 of 4: Select the Associated Inventory



1. Scroll down and complete the bottom of the form:
   - **Associated Vaccine Inventory:** select the lot number you are offering. See previous slide if you wish to submit multiple inventories of the same brand
   - **Auto-update Available Doses? (All):** (OPTIONAL) select this box if you would like to automatically update the available doses in the match based on doses available reflected in CVMS
   - **Adherence to all Requirements:** read requirements 1 and 2 and select the checkbox to agree to them

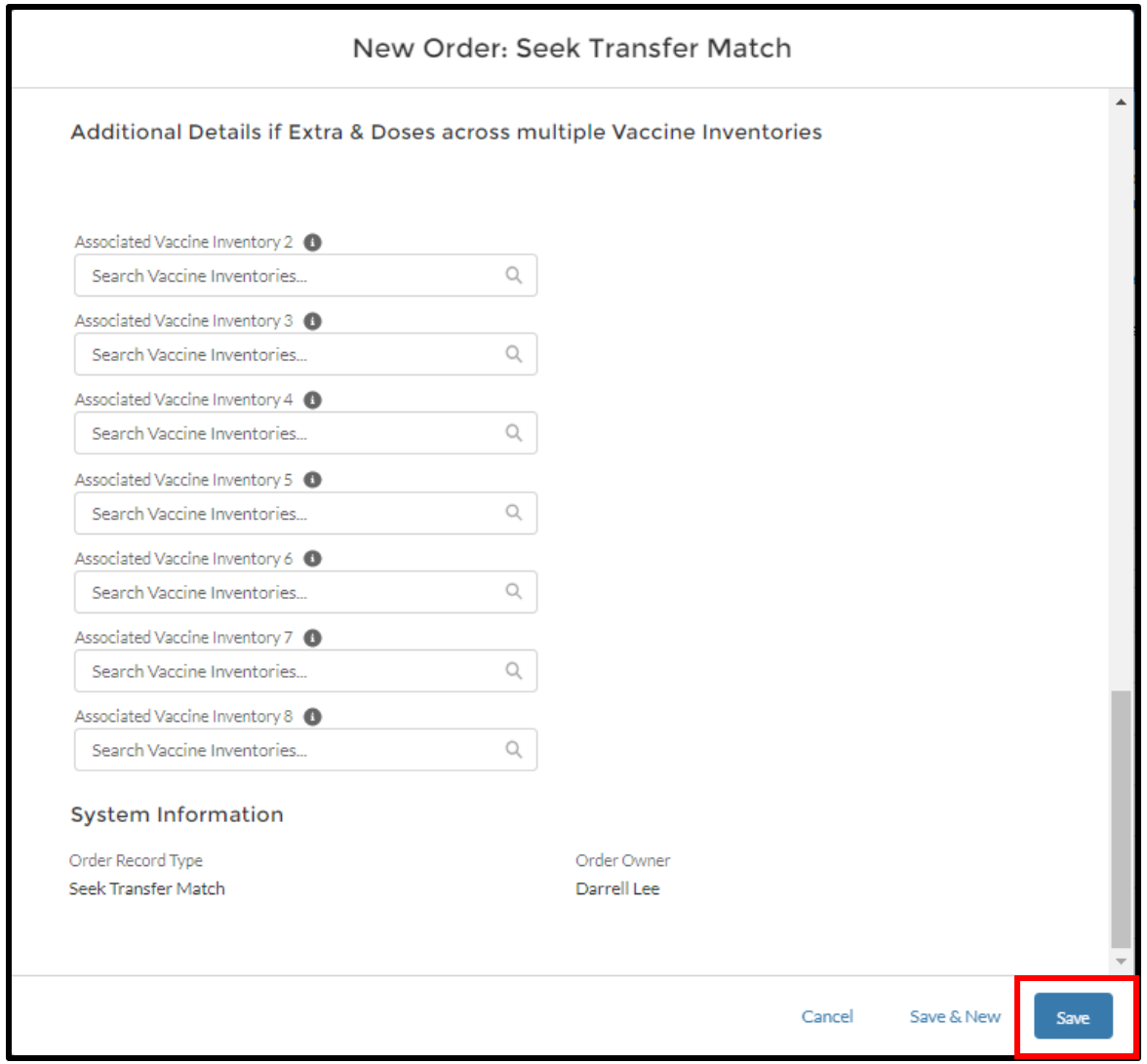
Audience

Healthcare Location Manager

Tips

Auto-updating available doses is optional. If you choose this option, the match will automatically update the available doses of your listing to reflect what is within CVMS. This can be especially helpful if you link multiple inventories to a single match, particularly if part of the inventory is used before the match is closed.

Step 4 of 4: Submit the "Seek Transfer Match" Form



1. Enter any additional associated inventories (if an Extra Seek Transfer Match)
2. Click **SAVE**

Audience

Healthcare Location Manager

Tips

So long as the inventories are from the same lot, you can combine inventories to create a single Extra Seek Transfer Match instead of having to create multiple matches.

Receive an Inquiry

Receive an Inquiry from Another Provider

Sandbox: COVID-19 Vaccine Marketplace Inquiry

NC CVMS <nccvms@dhhs.nc.gov>
To Digangi, Steve
7:21 PM

NCDHHS
COVID-19 Response

NC Department of Health and Human Services

Hello Steve,

Please see below for details of a Marketplace Inquiry from another Account regarding one of your COVID-19 Vaccine Marketplace 'Seek Transfer Match' requests.

Request Details:

- **Requesting Account Name:** DoNotUse-NotReaLoc Hotfix 1
- **Created Date:** 7/15/2021
- **Inquiry ID:** MKTINQ-0083
- **Doses:** 50
- **Manufacturer:** Moderna (14 doses/vial) COVID-19 Vaccine
- **Lot:** 19128
- **Contact Name:** Bill
- **Contact Number:** 444-555-6666
- **Contact Email:** billy@mailinator.com
- **Transportation Request:** Receiving Location to Pickup
- **Address:** Road
  Vik, North Carolina 00000
  County: Unknown
- **Additional Details:**
- **Status:** Open
- **Requested from Account:** DoNotUse-NotReaLoc Hotfix 1
- **Hub (Requested from Account):** Hub 1
- **Hub (Requesting Account):** Hub 1

Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine.

Thank you, NC Department of Health and Human Services

Division of Public Health

If another provider is interested in the COVID-19 vaccines that you are offering, you might receive an email with the details of their need, their address, and other information.

This e-mail is the result of a provider inquiry in CVMS.

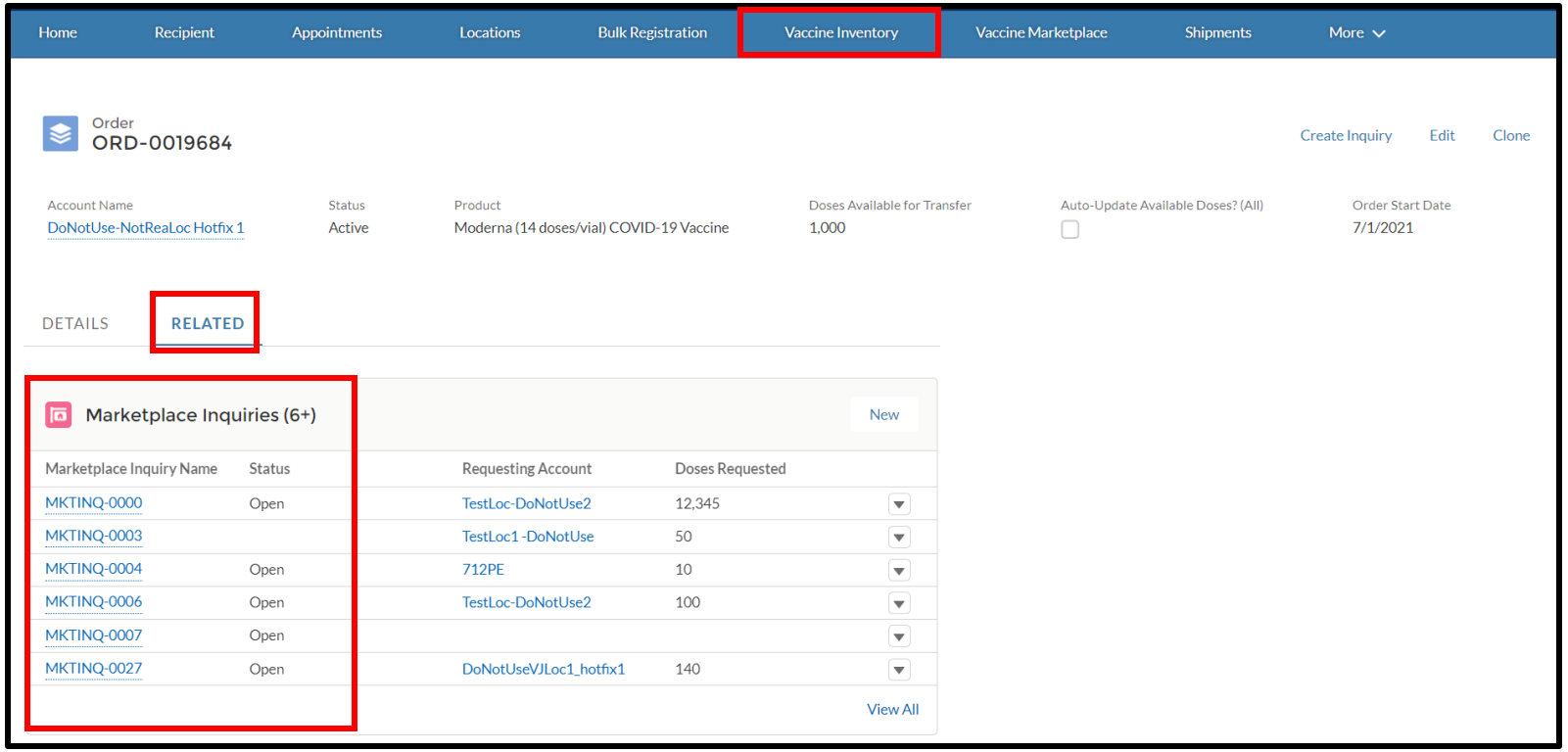
Audience

Healthcare Location Manager

Step 1 of 2: View the Inquiry in CVMS

You can see all the inquiries you received on a listing. To do so,

1. Open the listing record in the **VACCINE MARKETPLACE**
2. Click on the **RELATED** tab
3. View the list of Marketplace Inquiries
4. Open them by clicking on the Marketplace Inquiry Name Link

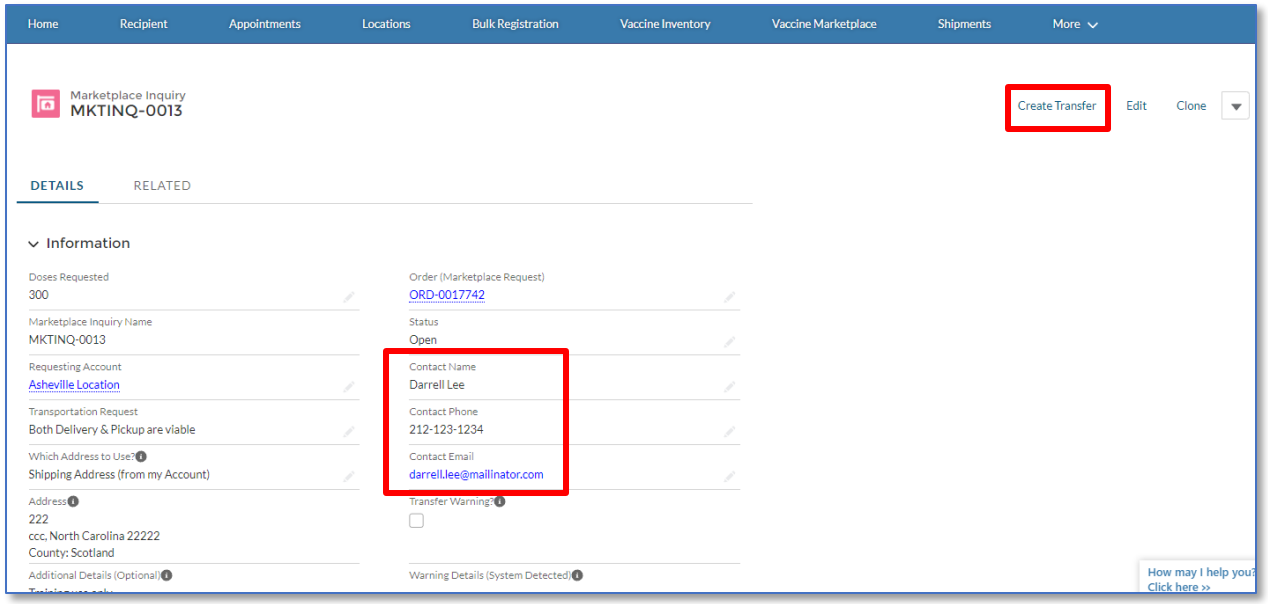


Audience

Healthcare Location Manager

Step 2 of 2: View the Inquiry in CVMS

5. Review the inquiry. Contact the listed provider to coordinate the transfer. Click on **CREATE TRANSFER**. The information from the Seek Transfer Match will auto populate.
6. Complete the transfer procedure as normal.

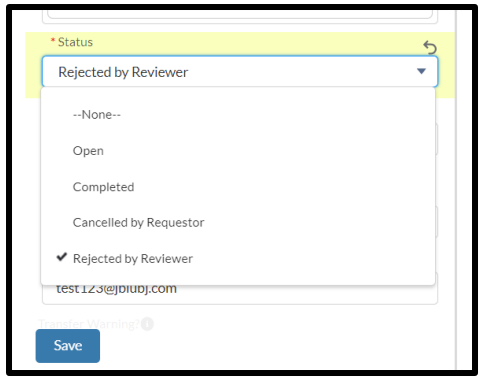


Audience

Healthcare Location Manager

Tips

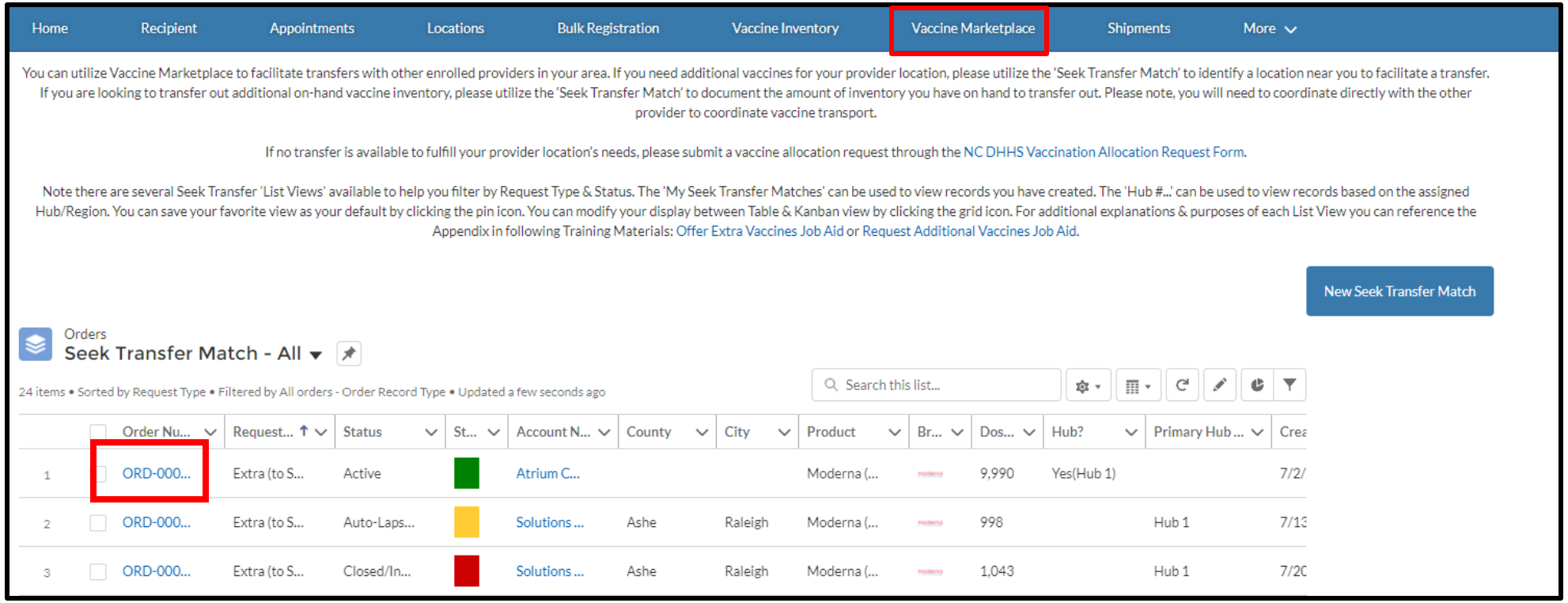
Once you contacted the inquirer, you can **EDIT** the **INQUIRY** and update the status to **COMPLETED** or **REJECTED BY REVIEWER**.



Initiate Transfers from Inquiries

Step 1 of 3: Open the Seek Transfer Match Associated with the Inquiry

1. Navigate to the **VACCINE MARKETPLACE**
2. Select the appropriate Seek Transfer Match associate with the inquiry

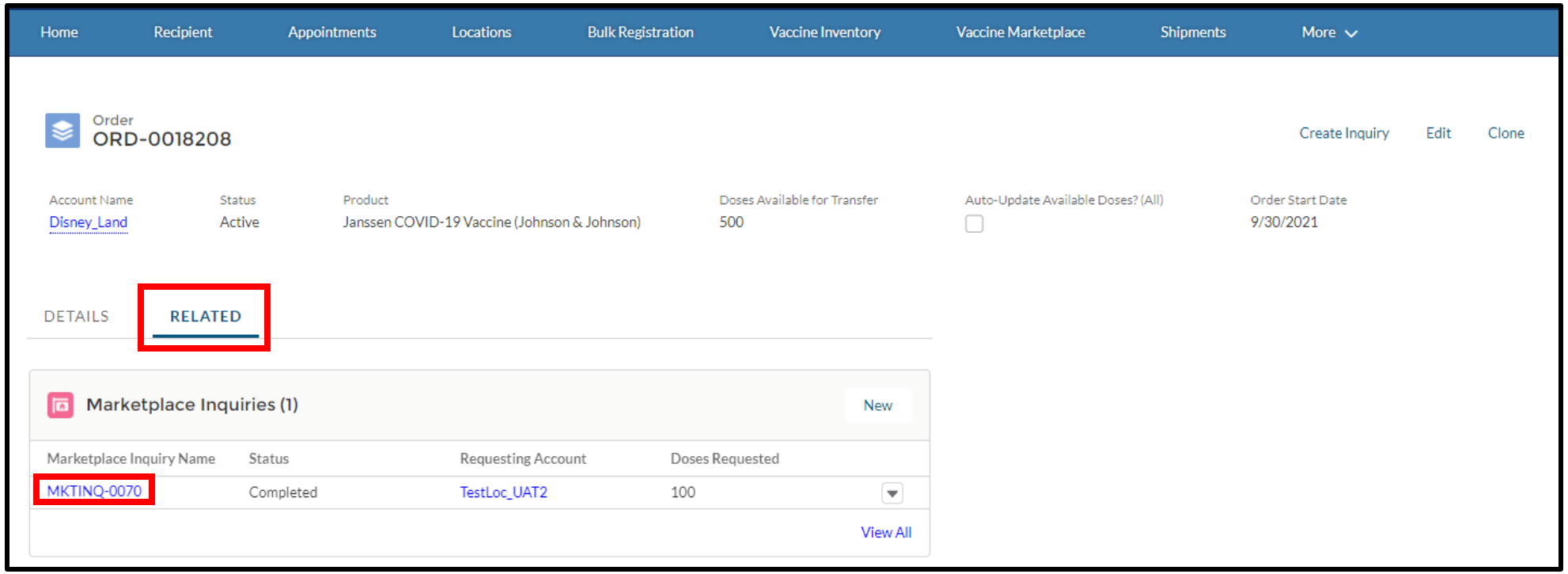


Audience

Healthcare Location Manager

Step 2 of 3: Navigate to the Related Tab

1. Navigate to **RELATED** tab
2. Open the applicable inquiry



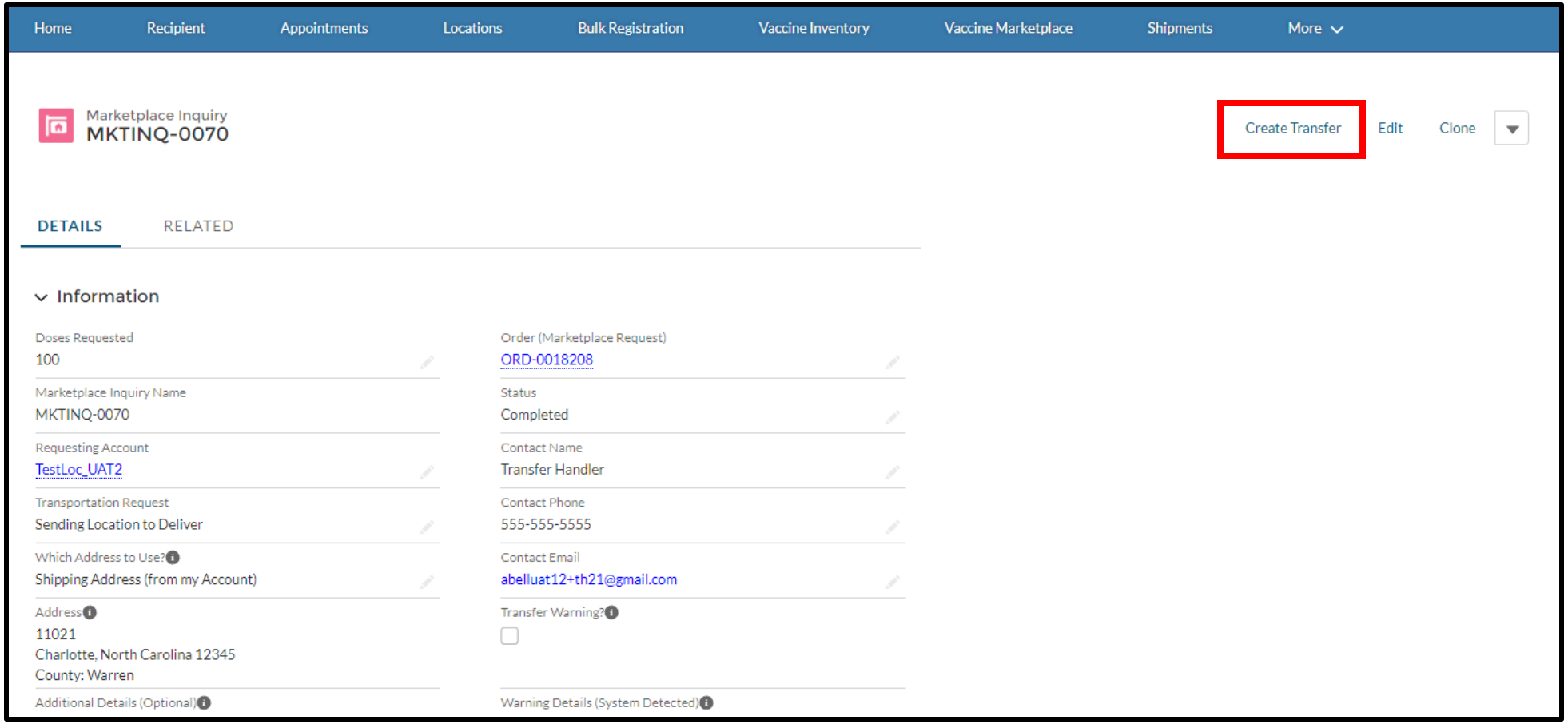
Audience

Healthcare Location Manager

Step 3 of 3: Proceed with Creating the Transfer

1. Click on **CREATE TRANSFER**

This will auto-fill the transfer form with the appropriate data. Proceed to **Transferring Vaccine Between Two Providers**



Audience

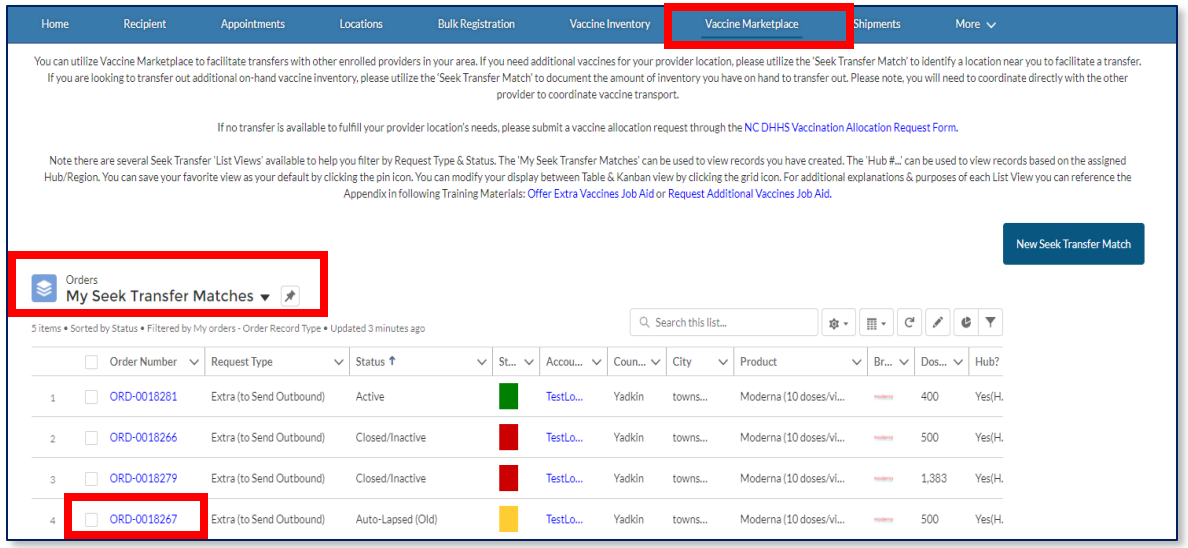
Healthcare Location Manager

Tips

Using this process to initiate a transfer will auto-populate the data into the Transfer Request form. However, you can still complete a transfer through the **ORDERS** section of the **RELATED** tab of the Vaccine Inventory.

Maintain Your Requests Posted in the Vaccine Marketplace

Step 1 of 4: Renew Your Extra Listings



Your post in the Vaccine Marketplace will expire:

- after 21 days,
- once linked inventory expires,
- if the linked inventories was fully consumed (available dose = 0).

You can renew your post within 21 days from original posting, or after 21 days of original posting by cloning your form and posting a new one.

1. Navigate to the **VACCINE MARKETPLACE** tab
2. Change the view to **MY SEEK TRANSFER MATCHES**
3. Open the request you wish to extend or to clone

Audience

Healthcare Location Manager

Tips

The Status color code is:

Yellow for Auto-lapse (Old) requests. These requests can only be cloned, and the Status cannot be modified.

Green for Active requests for which you can still extend the duration.

Red for Closed/Inactive requests that can be cloned as well to start a new form with the same content.

Step 2 of 4: Renew Your Listing

NCDHHS
CVMS Provider Portal

Home | Recipient | Appointments | Locations | Bulk Registration | More

Order
ORD-0017342

Edit | Clone

Account Name	Status	Manufacturer	Doses (Number)	Order Start Date
Training Team Vaccine Provider - Site 1	Active		300	6/9/2021

DETAILS | RELATED

COVID-19 Vaccine Seek Transfer Match Instructions

Seek Transfer Match Instructions

Please note, this is a request to seek a transfer match with other provider locations. Use this form to indicate if you have extra vaccine available for transfer to other provider locations OR if you need additional vaccine at your location. This is NOT a request for State allocation and is intended to aid in communication and coordination between provider locations. Please see the steps below that outline how to use the Vaccine Marketplace:

1. Fill out this form to request additional inventory as transfer or to transfer out inventory from your provider location.
2. Monitor the Vaccine Marketplace to identify a 'match' for your need.
3. Once a match is identified, work directly with the provider to coordinate transport. Vaccine cannot be transported until the transfer in CVMS is approved.
4. The provider location transferring out vaccine doses will initiate a transfer in CVMS. Please see this user guide with exact instructions: https://covid19.ncdhhs.gov/media/2318/download?attachment
5. The State will review and approve the transfer request if it meets all requirements.

Doses per Vial Reminder

All inbound and outbound requests must be made in increments of doses available in full and unopened vials: 6 doses per vial for Pfizer, 10 doses per vial for Moderna, 5 doses per vial for Janssen (J&J).

Seek Transfer Match Details

Request Type	Order Start Date
Extra (to Send Outbound)	6/9/2021
Account Name	**Status**
Training Team Vaccine Provider - Site 1	Active
Doses (Number)	Status Indicator

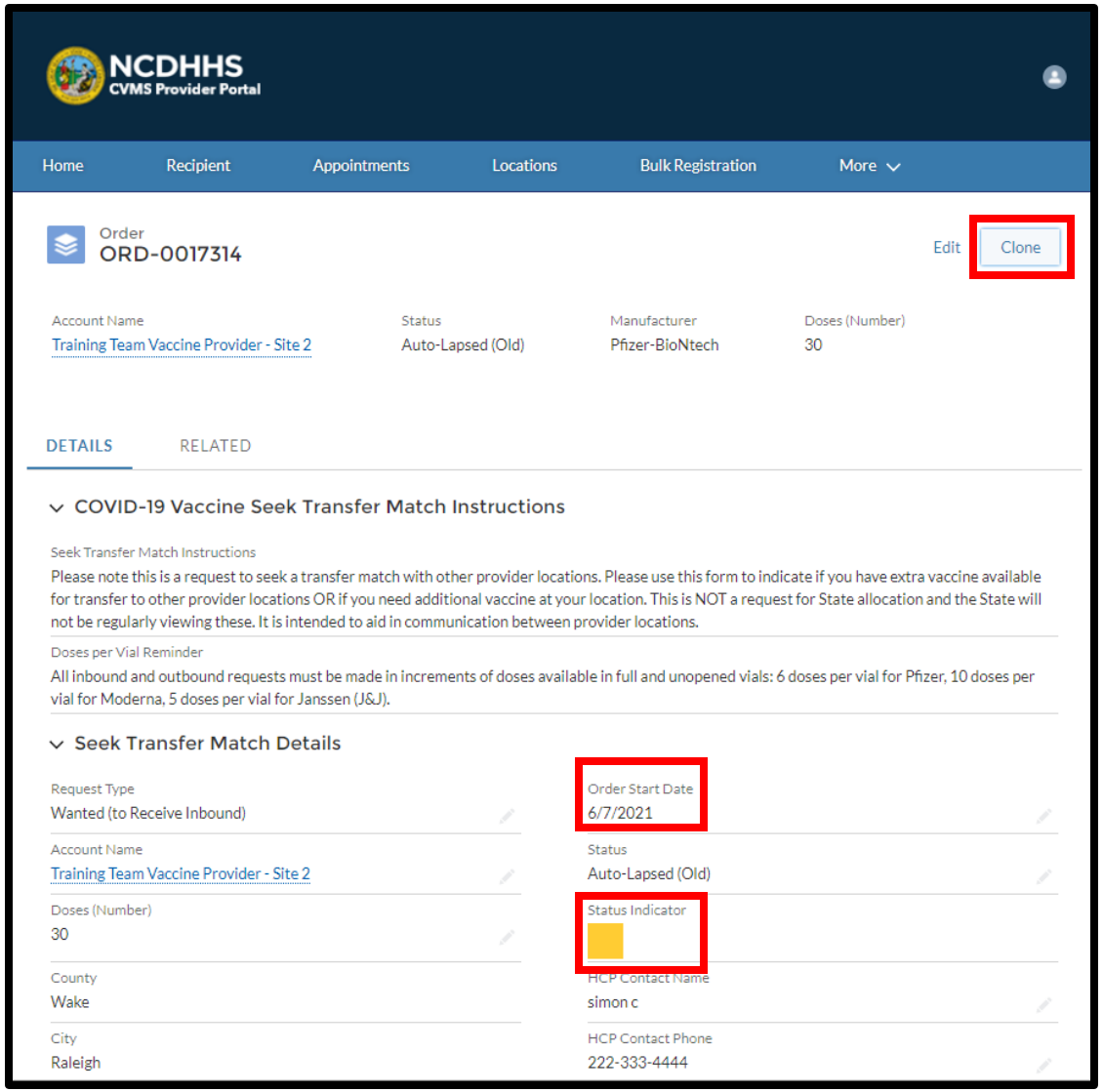
If you request is still active and you wish to extend the deadline before the request automatically expires, update the request date.

1. Click on **EDIT**
2. Update the **ORDER START DATE** to Today's date to reinitiate the 21-day countdown
3. Click **SAVE**

Audience

Healthcare Location Manager

Step 3 of 4: Clone Your Listing



If your request's status is **AUTO-LAPSED (OLD)** or **CLOSED/INACTIVE** and you wish to post an identical new form, use the clone feature.

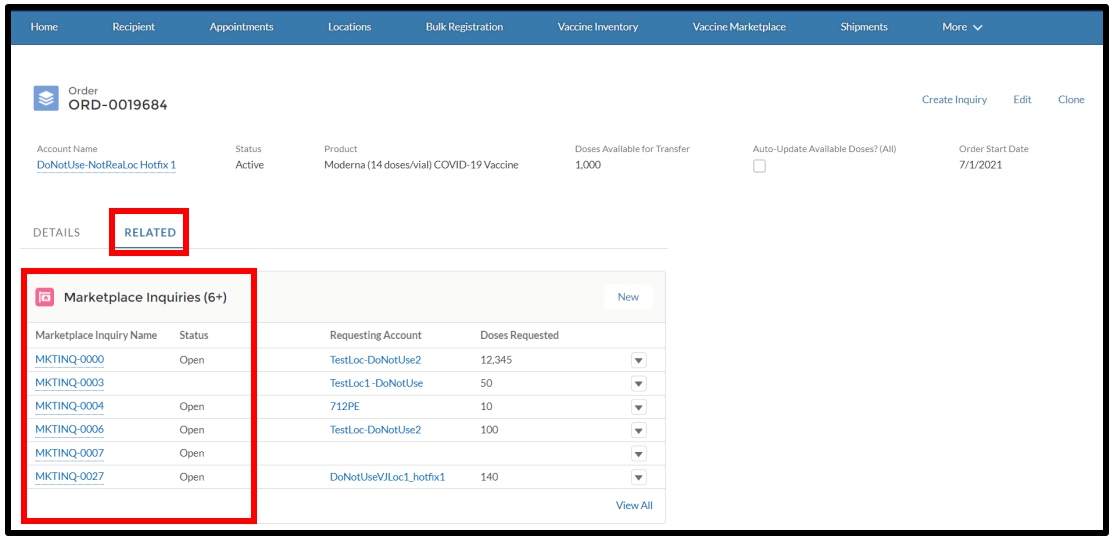
1. Click on **CLONE**
2. Update the **ORDER START DATE** to Today's date to reinitiate the 21-day countdown
3. Update the Status to **ACTIVE**
4. Update any other fields if necessary
5. Click **SAVE**

Audience

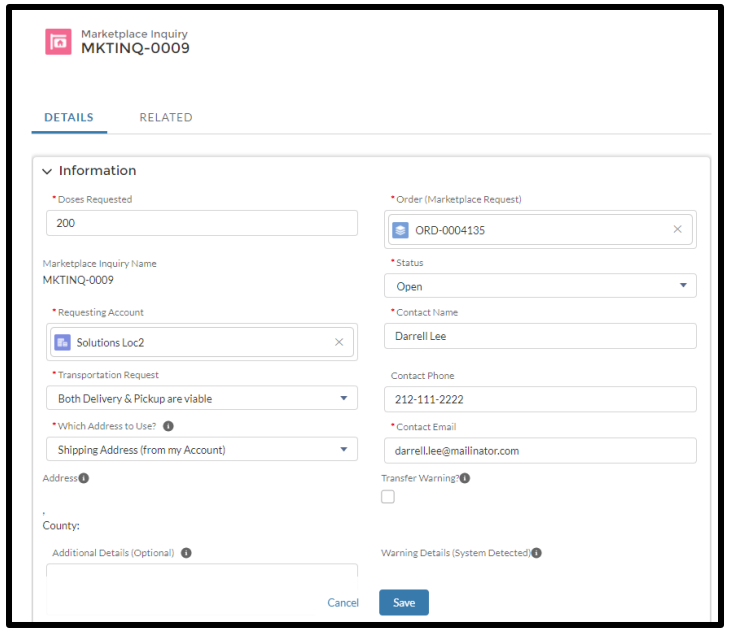
Healthcare Location Manager

Step 4 of 4 : Closing Active Inquiries for Vaccines that are No Longer Available

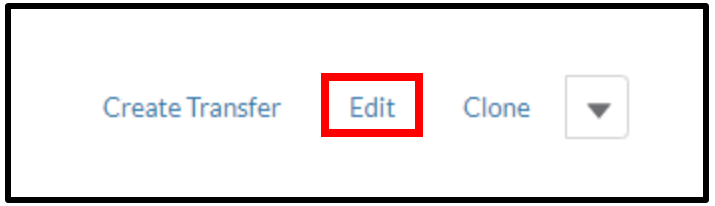
1. Navigate to the **Related** tab of the Order and select the appropriate **Marketplace Inquiry**



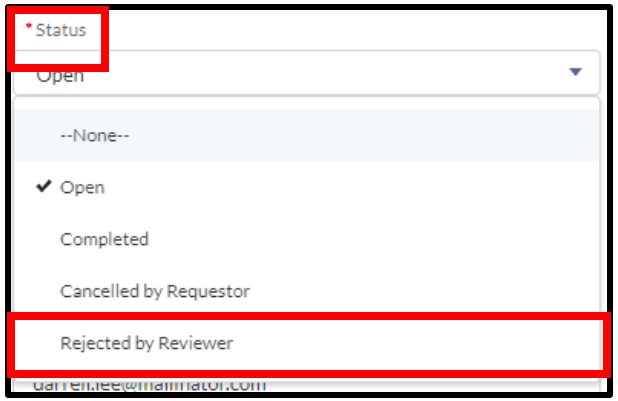
2. Review details for accuracy



3. Select **Edit**



4. Update **Status** to **Rejected by Reviewer**



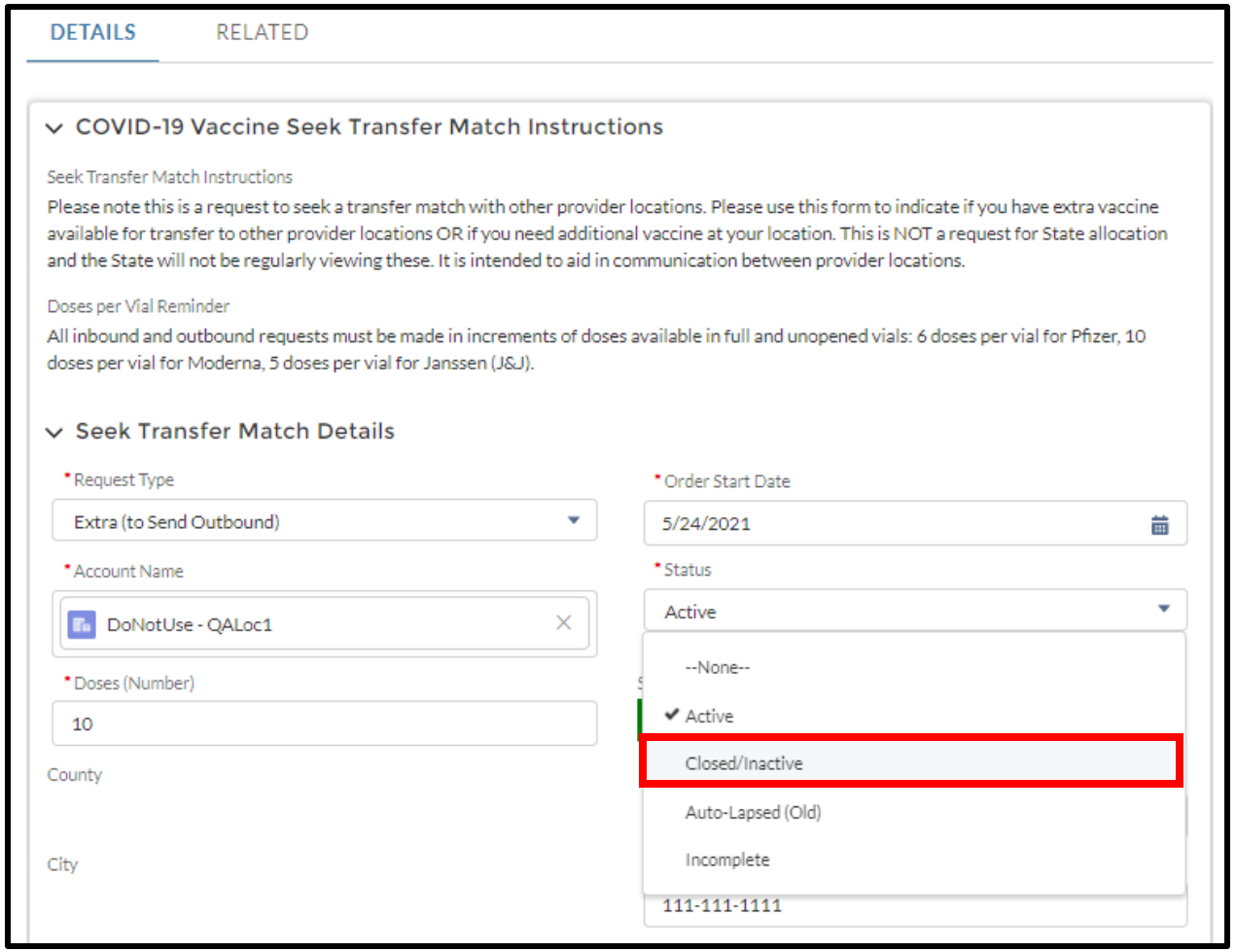
Audience

Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Close a Listing

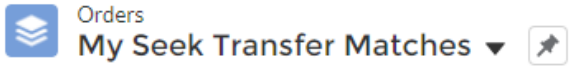
Step 1 of 2: Close Your Listing



If you reach agreement with a provider on the conditions of transfer, the sending provider will enter a transfer in the CVMS Provider Portal. Once the inventory is delivered, you can **receive the Inbound Transfer to add the inventory to your location (Click here for instructions on the Transfer).**

When a transfer has been completed, close your post in the Marketplace:

1. Navigate to the **Vaccine Marketplace** tab
2. Filter the view on

3. Open the form
4. Click on **EDIT** at the top right
5. Change the Status to **CLOSED/INACTIVE**

Audience

Healthcare Location Manager

Step 2 of 2: Set Inactivation Reason

Seek Transfer Match Details

*Request Type: Extra (to Send Outbound)
*Order Start Date: 5/24/2021
*Account Name: DoNotUse-NotReaLoc Hotfix 1
*Status: Closed/Inactive
Doses (Number): 1,000
Status Indicator
County: Unknown
*HCP Contact Name: Nicole HCP Tester
City: Vik
*HCP Contact Phone: 800-128-4219
Additional Comments (Optional)
*HCP Contact Email: joshuakemp85@gmail.com
Hub?: Yes(Hub 1)
Primary Hub Associated to this Location?
Coverage Type? (Hub): Regional
Transport: Pickup, Deliver, or Both?: Pickup Only
Inactivation Reason: --None--
- Completed (single Transfer)
- Completed (multiple Transfers)
- Fulfilled w/o using Marketplace
- Unfulfilled or No longer applicable
- Created in Error
- Auto-Lapsed (Weeks w/o Modification)
- Auto-Lapsed (Expiration Date past)

Additional Details if Extra (To Send Outbound)

Associated Vaccine Inventory: Search Vaccine Inventories...
Vaccine Product to Transfer: Moderna (14 doses/vial) COVID-19 Vaccine
Expiration Date: 8/31/2021
Lot Transferred: 19128
Sending Location Parent Account (Org): DoNotUse - NotRealOrg Hotfix 1

Cancel | Save

Additional Details if Wanted (To Recei

When the Seek Transfer Match is closed, identify the reason. Navigate to the **Vaccine Marketplace** tab

1. Navigate to the **INACTIVATION REASON**
2. Open the pick list
3. Select the appropriate reason
4. Click **SAVE**

Audience

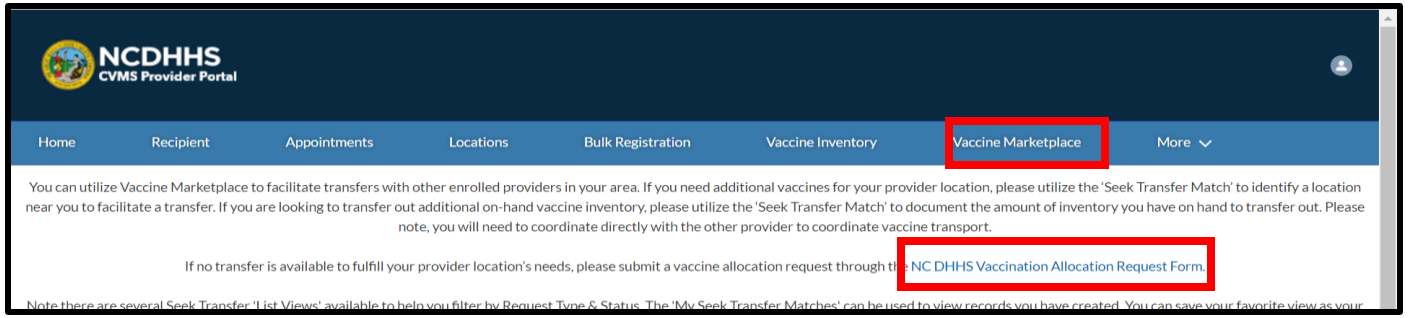
Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

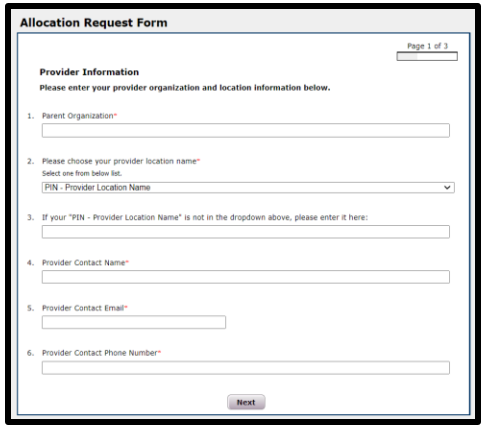
Request Vaccine Allocation from the State

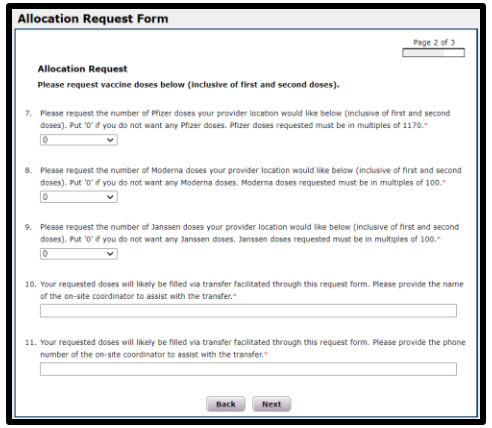
Submit a Request for COVID-19 Vaccine Shipment to NCDHHS

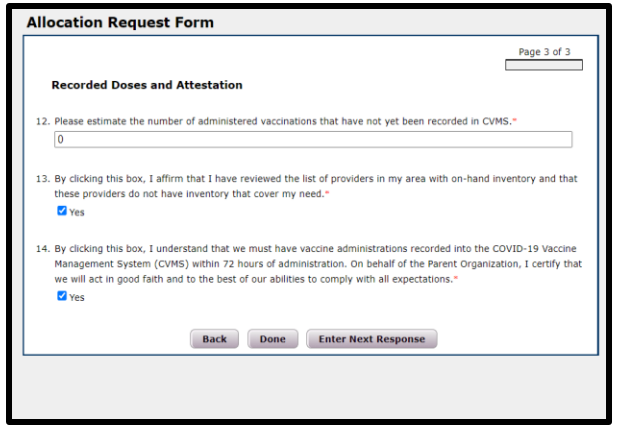
If there is no inventory available nearby, you can submit a vaccine allocation request to NCDHHS via the NCDHHS Vaccine Allocation Form: https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyID=98MI76m3#. A link to the form was added to the **VACCINE MARKETPLACE** tab.



1. Navigate to **VACCINE MARKETPLACE**
2. Click the **NC DHHS VACCINATION ALLOCATION REQUEST FORM** link







3. Fill out the **form** and **submit it**

Audience

Healthcare Location Manager

Tips

This step should only be completed after collaborating with your assigned Hub.

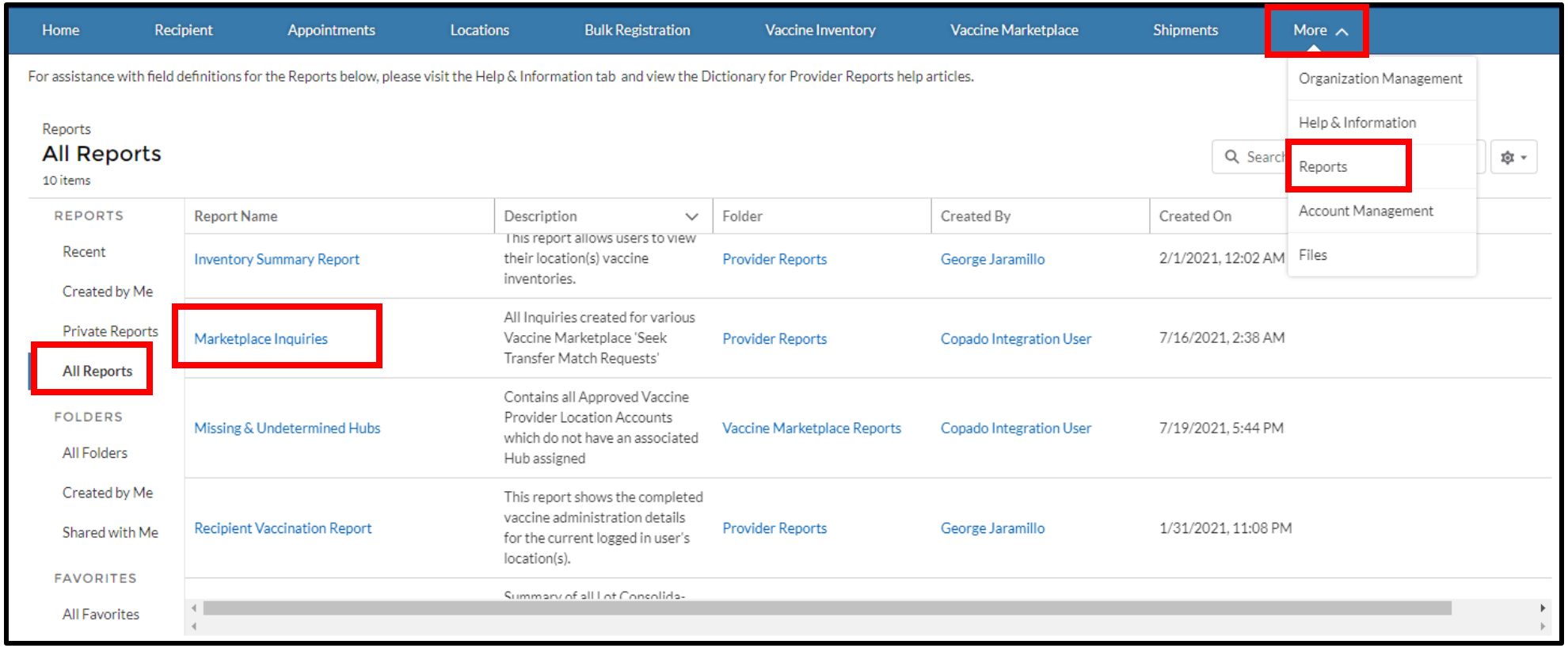
NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Accessing Inquiries Report

Accessing the Marketplace Inquiries Report

The Marketplace Inquiries Report displays all inquiries for listings you posted in the Vaccine Marketplace.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **MARKETPLACE INQUIRIES REPORT**



Audience

Healthcare Location Manager

Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal.

Accessing the Marketplace Inquiries Report (Continued)

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

Report: Marketplace Inquiries

Marketplace Inquiries

All Inquiries created for various Vaccine Marketplace 'Seek Transfer Match Requests'

Add Chart | Export

Total Records	Total Doses Requested	Total Transfer Warning?
20	3,063	0

Requested from Account	Requesting Account	Order (Marketplace Request)	Marketplace Inquiry: Marketplace Inquiry Name	Status	Doses Requested	Vaccine Product	Trans
DoNotUseNotARealLocADA (14)	DoNotUseNotARealLocADA (14)	ORD-0017463 (1)	MKTINQ-0001	Open	300		Sendi
		Subtotal			300		
		ORD-0017465 (1)	MKTINQ-0002	Open	300	TestVaccine2 (Moderna)	Sendi
		Subtotal			300		
		ORD-0017468 (1)	MKTINQ-0008	Open	300		Sendi
		Subtotal			300		
		ORD-0017489 (1)	MKTINQ-0000	Open	300		Sendi
		Subtotal			300		
		ORD-0017553 (1)	MKTINQ-0007	Open	250		Sendi
		Subtotal			250		
		ORD-0017577 (1)	MKTINQ-0009	Open	23		Sendi
		Subtotal			23		
		ORD-0017579 (4)					

Row Counts | Detail Rows | Subtotals | Grand Total

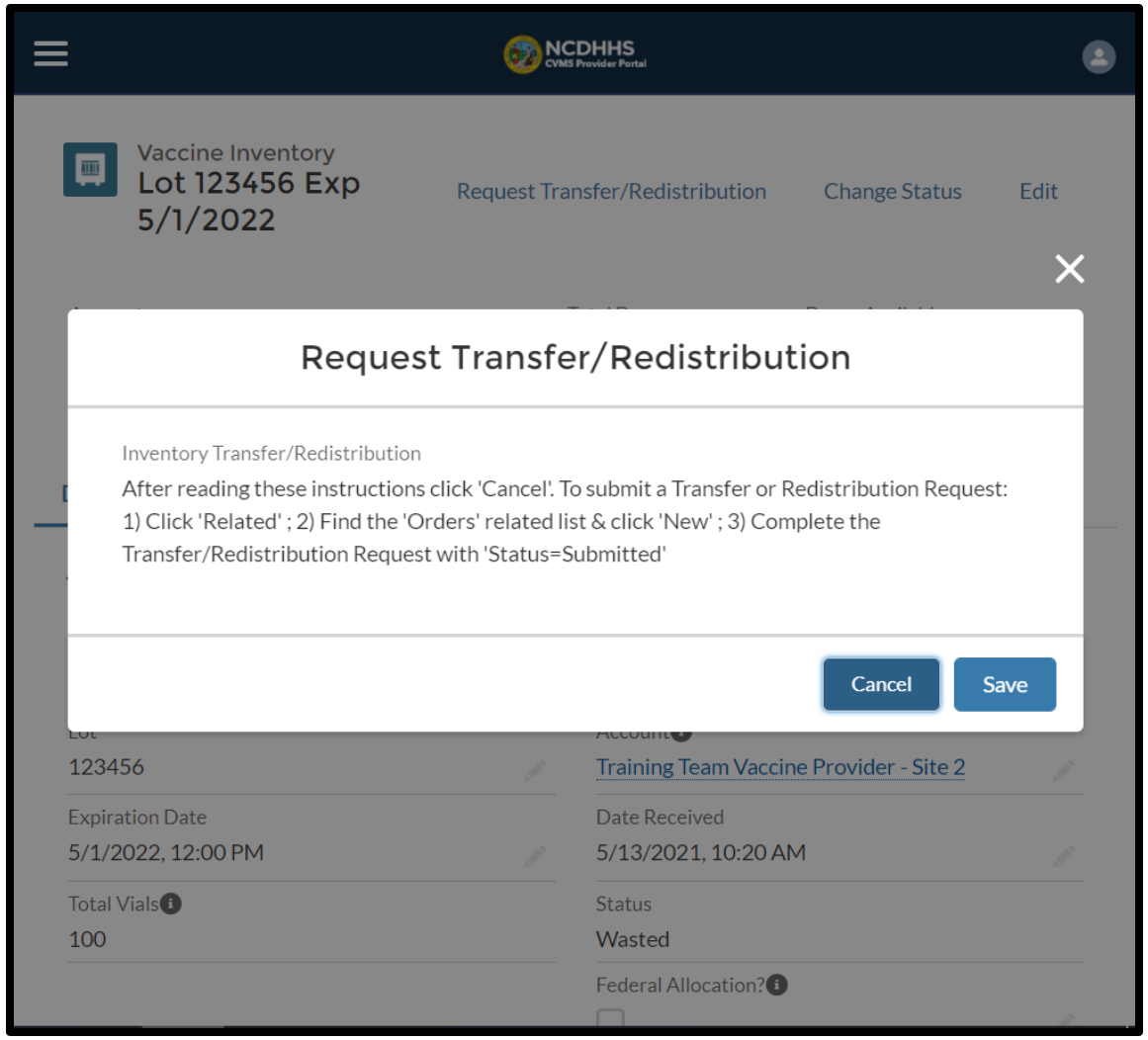
Audience

Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Transferring Vaccine between two Providers

Transfer Vaccine Inventories Between Two Locations



When a COVID-19 vaccine is to be redistributed / transferred to another provider location

- Healthcare Location Manager enters the COVID-19 Vaccine Redistribution/Transfer Request into the CVMS Provider Portal with details such as Sending Location, Receiving Location, lot number, and quantity to redistribute/transfer. The approved redistribution/transfer is reflected as an order for the Receiving Location.
- The COVID-19 Vaccine On Hand inventory of the sending location is decreased. The receiving location has a COVID-19 Vaccine Inventory Record auto-created, but the quantity is noted as "in transit".
- Receiving Location completes "Inbound Redistribution/Transfer" process, and the quantity is changed from "in transit" to "available“.

Initiate an Outbound Transfer or Redistribution

Overview of an Outbound Redistribution/Transfer

Redistribution and transfer requests require **NCDHHS IMMUNIZATION BRANCH APPROVAL** to ensure proper storage capabilities and tracking of COVID-19 Vaccine Inventory movements. There are three scenarios that transfer requests will fall under.

1. If a provider requests a redistribution between two CVMS Provider locations within the same organization, who have an existing redistribution agreement, **THE TRANSFER IS AUTOMATICALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
2. If a provider requests a redistribution between two locations within the same organization, but there is no existing redistribution agreement, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**
3. If a provider requests a transfer to a location that is outside their location's organization, the **TRANSFER MUST BE MANUALLY APPROVED BY NCDHHS IMMUNIZATION BRANCH**

Audience

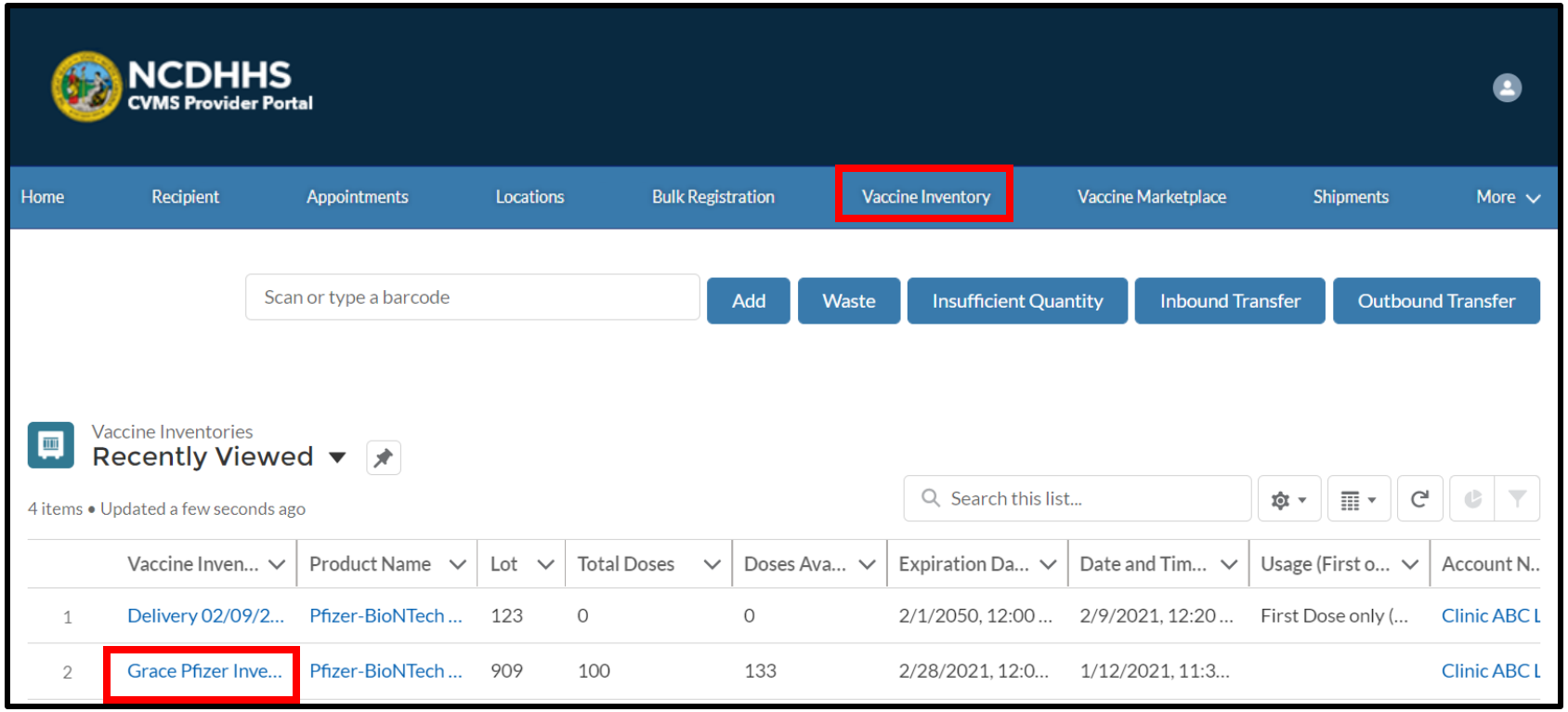
Healthcare Location Manager

Step 1 of 10: Locate Inventory for Redistribution/Transfer

To initiate an **OUTBOUND REDISTRIBUTION/TRANSFER** to another location, you will have to submit a request through the CVMS Provider Portal.

1. From the Home Page, click the **VACCINE INVENTORY** tab

2. Select the correct **VACCINE INVENTORY** record that you want to redistribute/transfer to a different location / organization



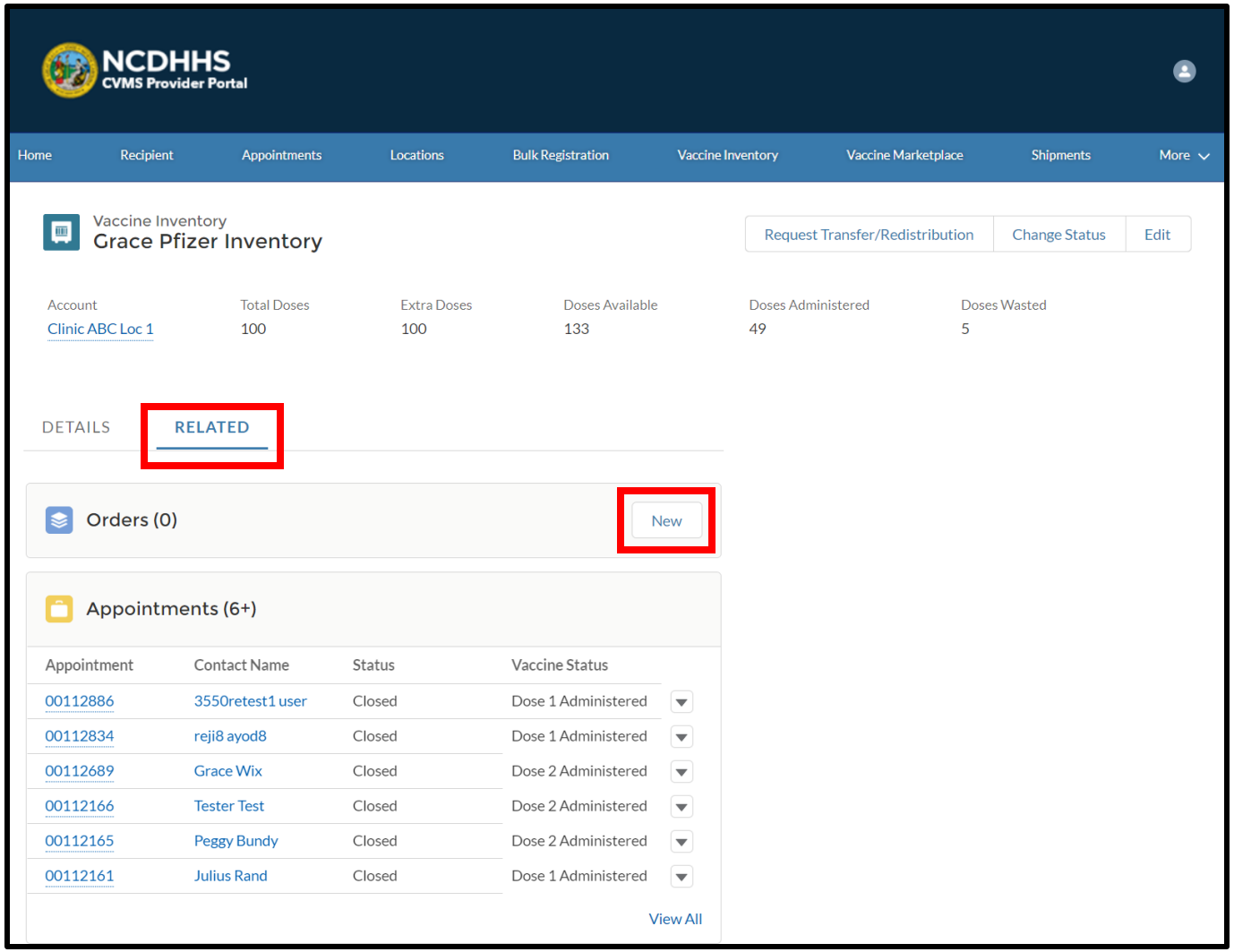
Audience

Healthcare Location Manager

Tips

Selecting the **OUTBOUND TRANSFER** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

Step 2 of 10: Creating a Transfer/Redistribution Request



1. From the Vaccine Inventory Record, select the **RELATED** tab
2. Locate the **ORDERS** related list and click **NEW**

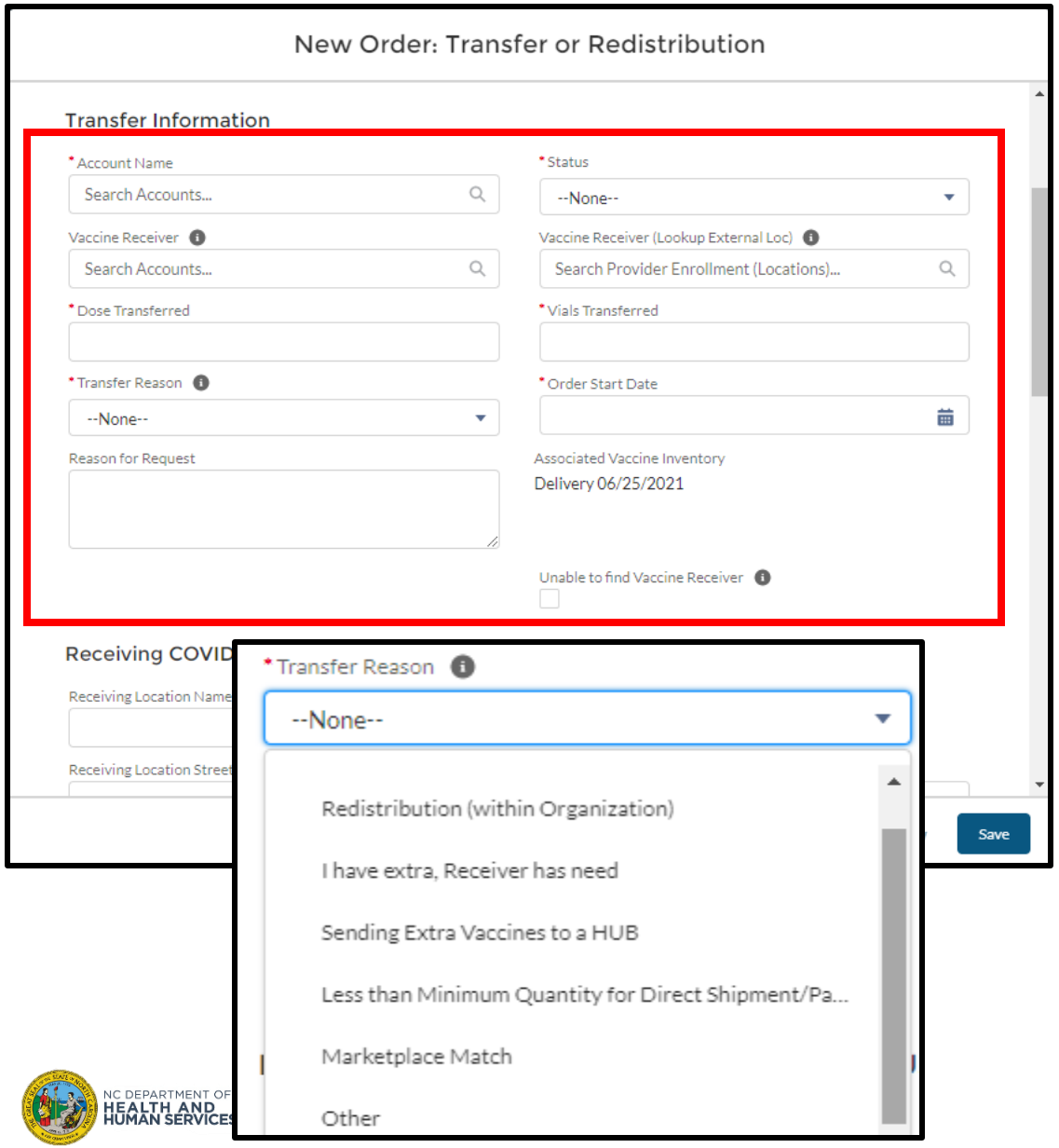
Audience

Healthcare Location Manager

Tips

Selecting the **REQUEST TRANSFER / REDISTRIBUTION** button will not initiate a transfer request but will instead provide a brief overview of the instructions contained in this guide.

Step 3 of 10: Edit the Order Transfer Record



A pop-up window will appear titled **NEW ORDER: TRANSFER OR REDISTRIBUTION** for you to fill out.

1. Enter your own location for **ACCOUNT NAME**
2. Select **SUBMITTED** for status
3. If the receiving provider / location is associated with your account in CVMS, enter the name of the receiving provider in the **VACCINE RECEIVER** field
4. If the receiving provider is in CVMS but not associated with your location, enter the name in the **VACCINE RECEIVER (LOOKUP EXTERNAL LOC)** field
5. If the receiving provider / location is not built into CVMS, select the **UNABLE TO FIND VACCINE RECEIVER** button
6. Enter the desired number of doses and vials to be transferred
7. Select a **TRANSFER REASON**
8. Enter the desired date for transfer

Audience

Healthcare Location Manager

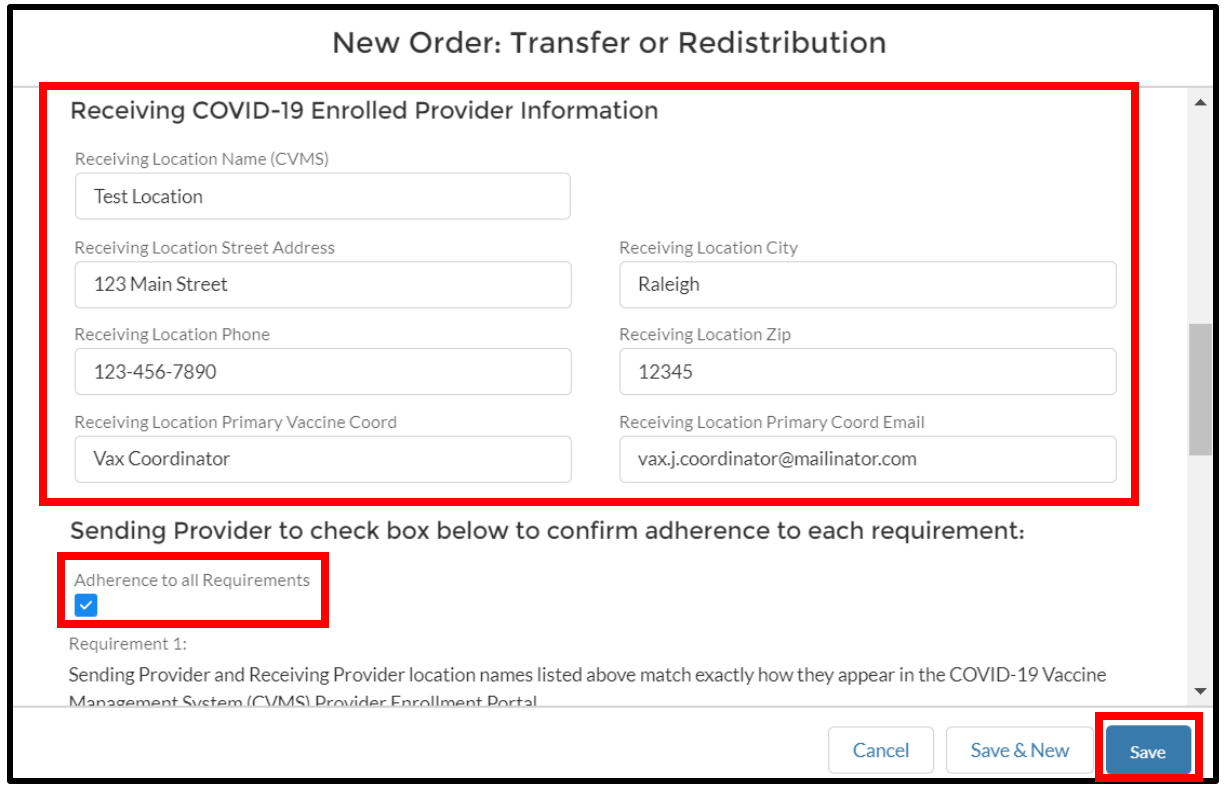
Tips

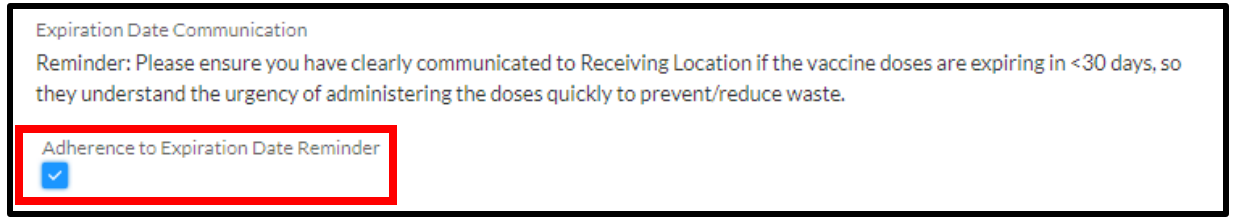
The doses transferred must be less than the doses currently available on the selected Vaccine Inventory Record.

The Vials Transferred number must be equal to the Doses Transferred divided by the standard doses per vial for the vaccine inventory.

Save request as a Draft Status to review all information prior to submitting. Transfer request will be reviewed once the request status has been changed to submitted.

Step 4 of 10: Submit the Order Transfer Record





Scroll down within the **NEW ORDER: TRANSFER OR REDISTRIBUTION** pop-up window.

1. If the receiving provider / location is not registered in CVMS, fill in the Location Name, Street Address, City, Phone Number, Zip Code, and Vaccine Coordinator's Name and Phone Number for the receiving provider
2. Review all the listed requirements for initiating a transfer / redistribution request
3. Select the **ADHERENCE TO ALL REQUIREMENTS** checkbox
4. If the vaccine inventory being transferred expires within 30 days, read the **EXPIRATION DATE COMMUNICATION** and check **ADHERENCE TO EXPIRATION DATE REMINDER**
5. Click **SAVE**

Audience

Healthcare Location Manager

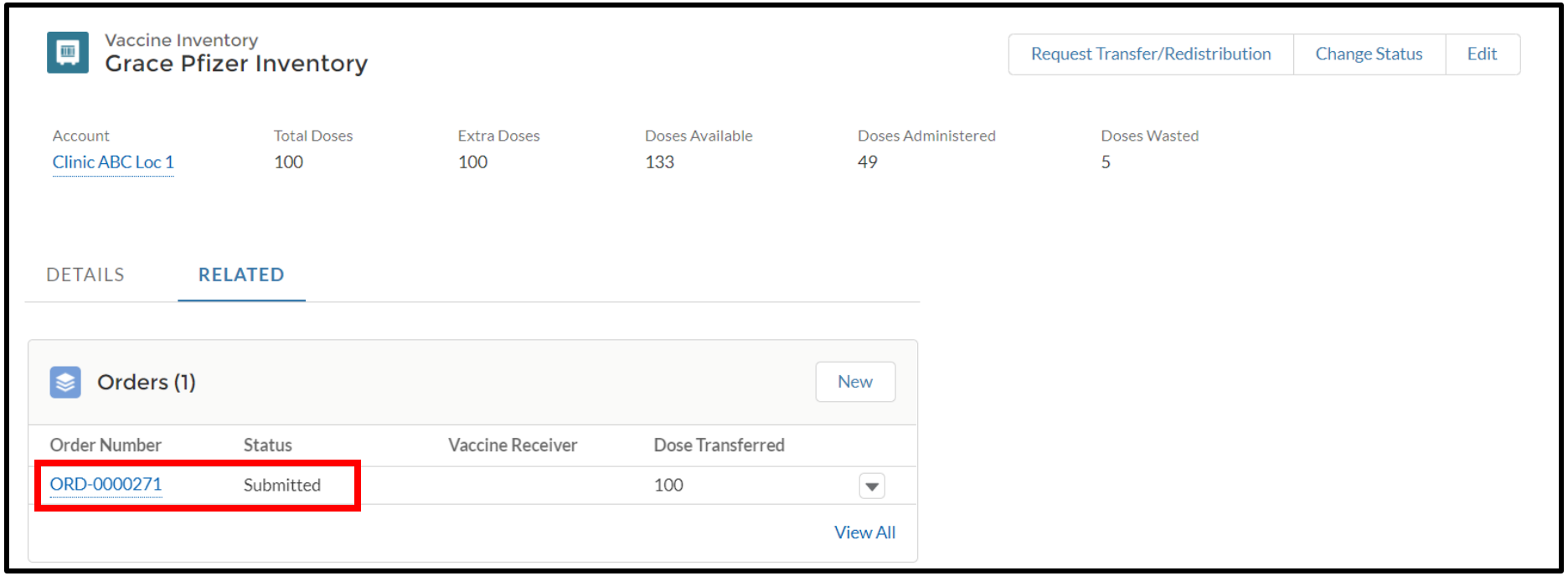
Tips

If you selected the **UNABLE TO FIND VACCINE RECEIVER** checkbox at the top of the form, you must fill in **ALL** fields in the **RECEIVING COVID-19 ENROLLED PROVIDER INFORMATION** section.

While no action is required outside of 30 days, any vaccine with an expiration date within 30 days will trigger a validation rule that requires the sending provider to confirm that they have clearly communicated to the receiving provider the upcoming expiration date of the vaccine being transferred.

Step 5 of 10: Confirm the Redistribution/Transfer Request was Submitted

1. On the **ORDERS** related list from the Vaccine Inventory Related Tab, the new Order redistribution or transfer request will appear
2. If the status shows as **SUBMITTED** or **PROCESSING**, that indicates the redistribution or transfer is pending approval from NCDHHS Immunization Branch
3. If the status appears as **TRANSFER IN TRANSIT**, that indicates the transfer has been approved by NCDHHS Immunization Brach



Audience

Healthcare Location Manager

Step 6 of 10: Provide Redistribution/Transfer Details

Once your **NC COVID-19 VACCINE REDISTRIBUTION/TRANSFER REQUEST** is approved, you will be able to **TRANSFER YOUR VACCINE INVENTORY** to the receiving location.

As soon as the transfer is approved, the Healthcare Location Manager who initiated the transfer request will receive an automated email indicating the approval.

[External] Sandbox: CDC COVID-19: Transfer/Redistribution Approved - 100 doses to Te...

NC CVMS <nccvms@dhhs.nc.gov>

To

Reply | Reply All | Forward | ...

Thu 2/11/2021

If there are problems with how this message is displayed, click here to view it in a web browser.

Hello ,

Your Transfer/Redistribution request has been approved. Please see below for details and send this as soon as possible.

Transfer/Redistribution Details:

- **Sending Location:** Clinic ABC Loc 1
- **Receiving Location:** Test Location
- **Doses:** 100
- **Vials:** 20
- **Lot:** 909
- **Vaccine Product:** Pfizer-BioNTech (5 doses/vial) (195 MDV) COVID-19 Vaccine

Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine.

Thank you, NC Department of Health and Human Services

Division of Public Health

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

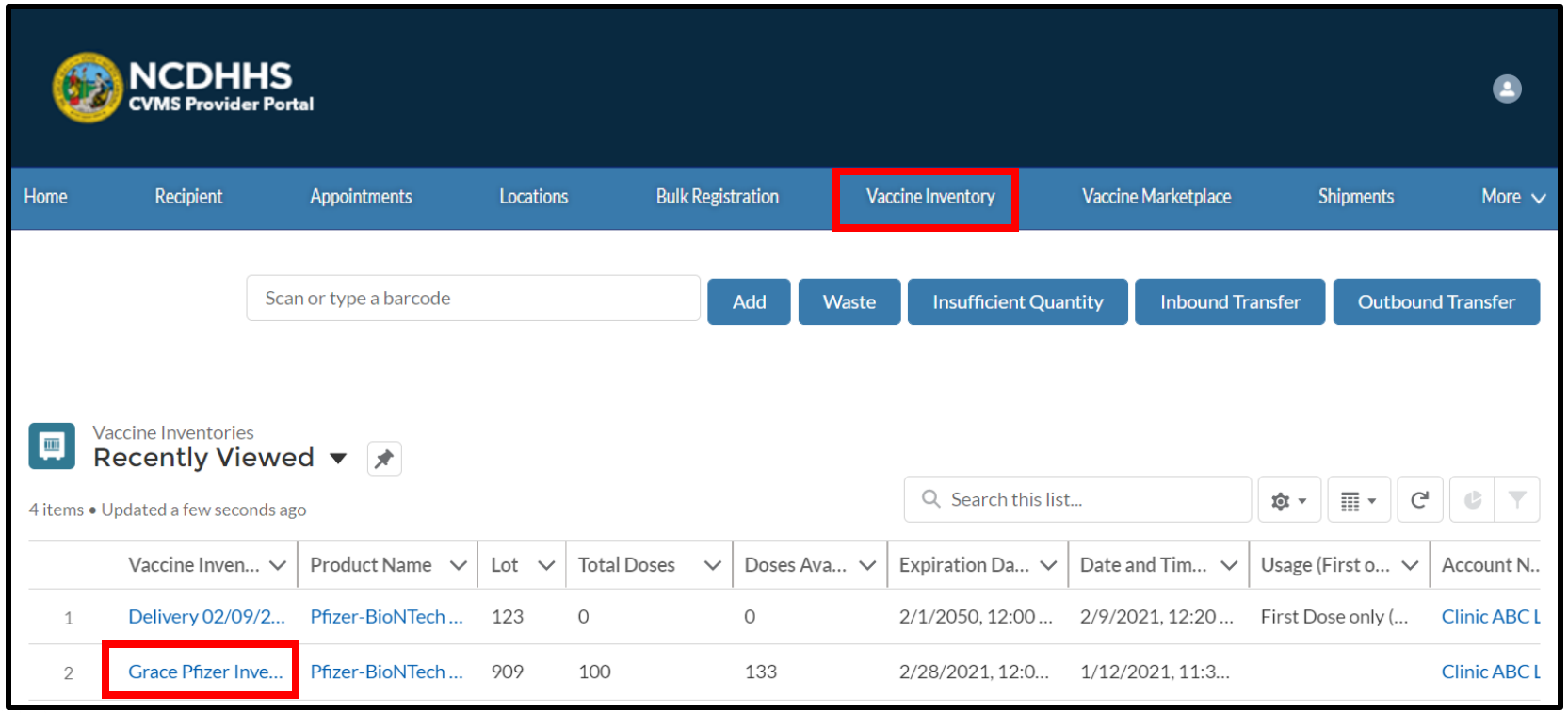
Audience

Healthcare Location Manager

Step 7 of 10: Provide Redistribution/Transfer Details

You can **UPDATE** the Order Transfer Record with the **ACTUAL TRANSFER DETAILS** to support tracking of the shipment. The Order Transfer Record can be located via the Vaccine Inventory Record that is providing the inventory.

1. From the Home page, click the **VACCINE INVENTORY** tab
2. Select the correct **VACCINE INVENTORY** Record

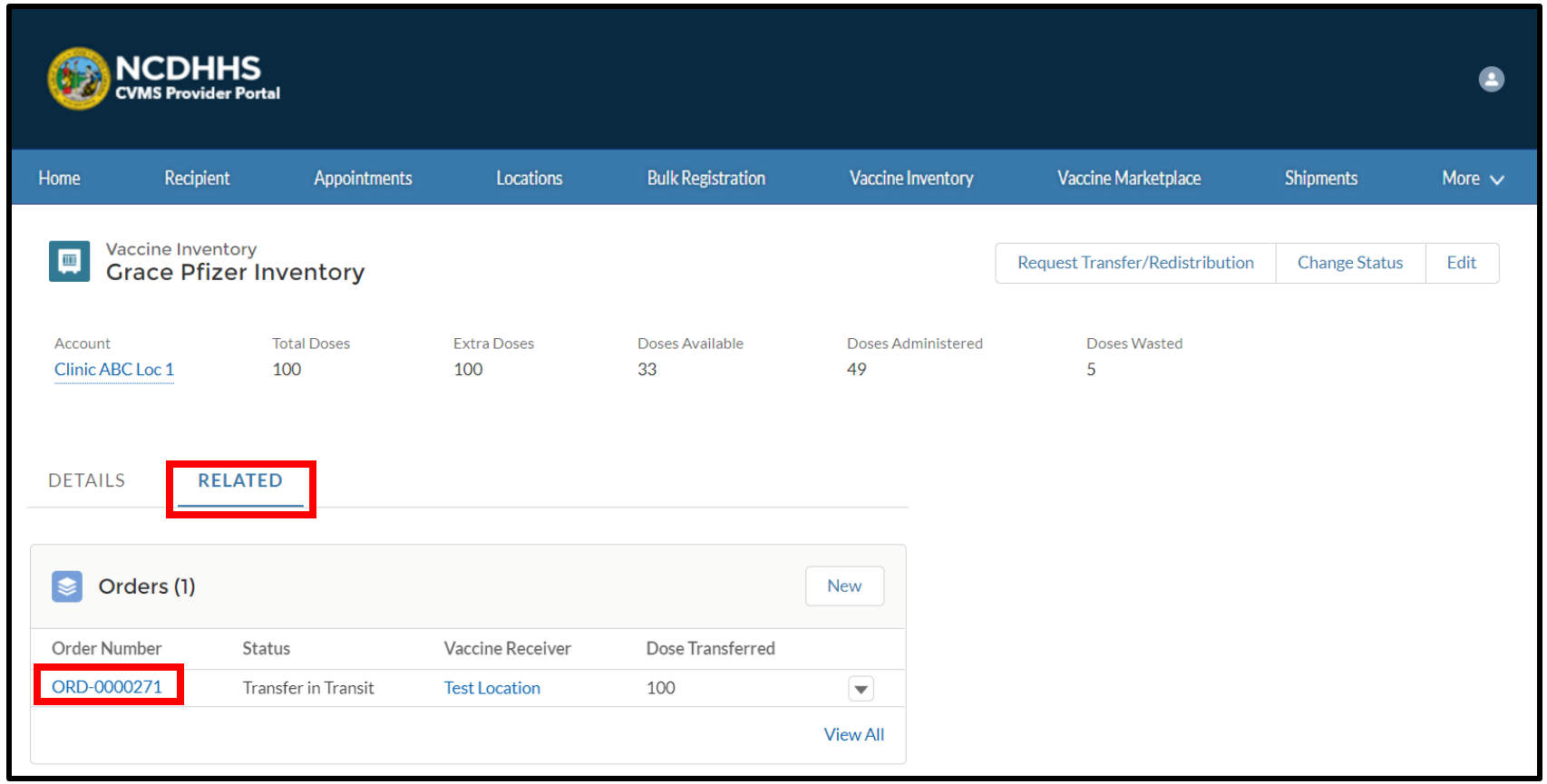


Audience

Healthcare Location Manager

Step 8 of 10: Open the Approved Redistribution/Transfer Request

1. Navigate to the **RELATED TAB**
2. Locate the Orders related list
3. Confirm that the Order is in **TRANSFER IN TRANSIT** status and click the **ORDER NUMBER** of the Transfer Request



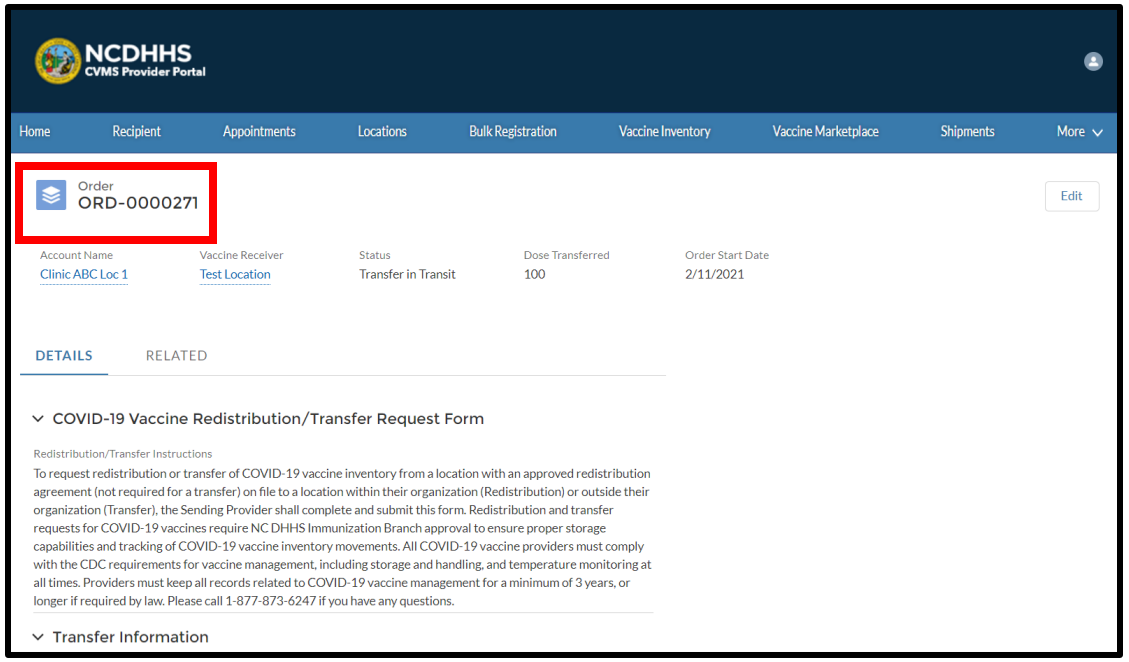
Audience

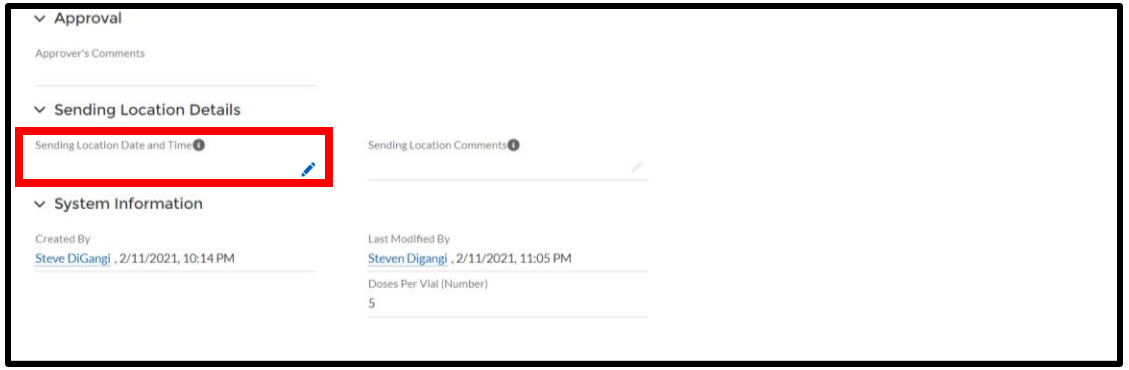
Healthcare Location Manager

Tips

Review the Vaccine Receiver to confirm it is the correct record.

Step 9 of 10: Update the Order Transfer Record





Once you have the **ORDER TRANSFER RECORD** open, you can provide the **TRANSFER DETAILS REQUIRED**.

1. Scroll down to the **SENDING LOCATION DETAILS** section
2. Click the **PENCIL ICON** next to **SENDING LOCATION DATE AND TIME**

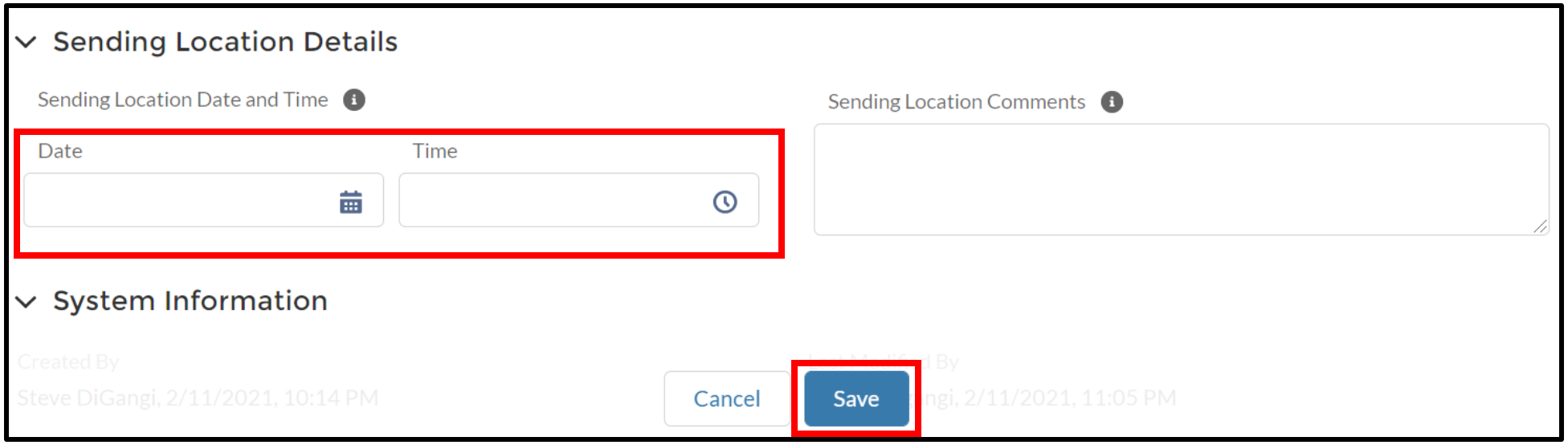
Audience

Healthcare Location Manager

Step 10 of 10: Submit Shipment Details

Once you click edit, you will be able to update the record and save your changes.

1. Enter the **SENDING LOCATION DATE** and **TIME** when the vaccines were sent
2. Enter the **TRANSFER TRACKING INFORMATION** in the **SENDING LOCATION COMMENTS** field
3. Click **SAVE**



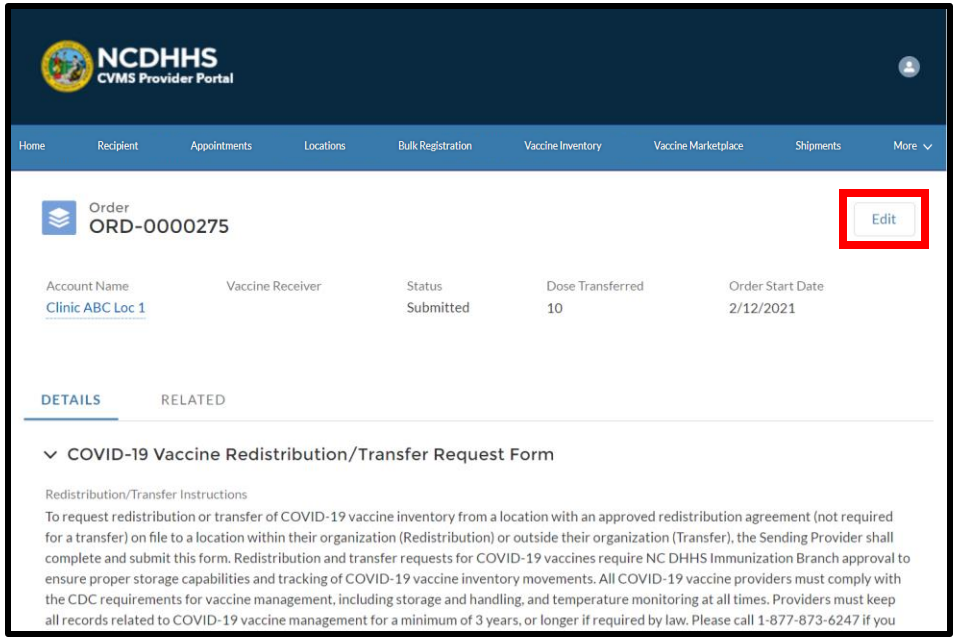
Audience

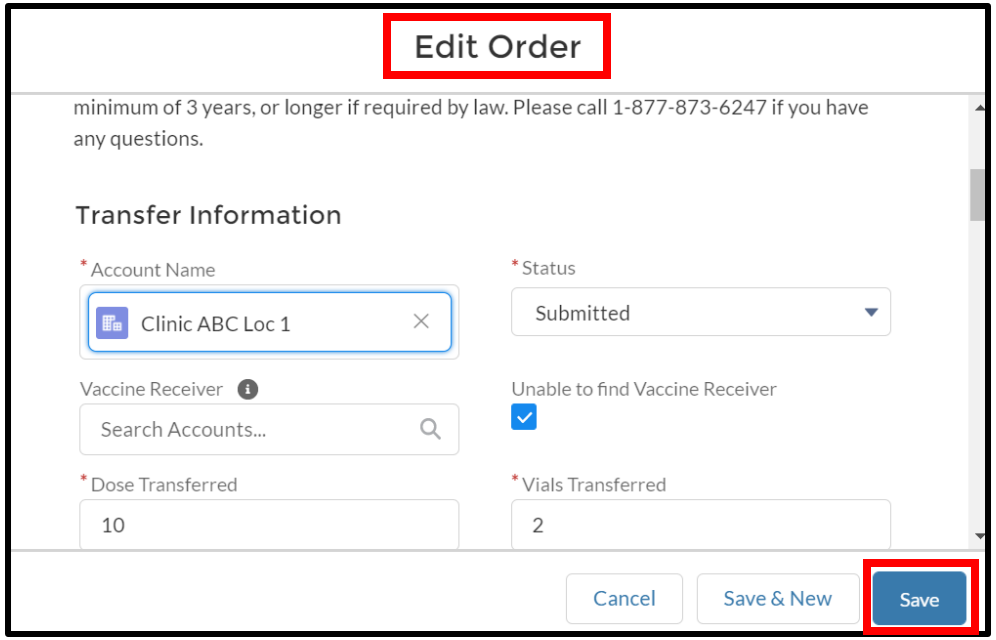
Healthcare Location Manager

Editing Order Redistribution or Transfer Requests

Transfer requests can still be **EDITED** while in **SUBMITTED** or **DRAFT** status.

1. Select the Vaccine Inventory Record that has a transfer request
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **SUBMITTED** or **DRAFT** status
3. Click on the **EDIT** button
4. Make changes to the necessary fields and click **SAVE**

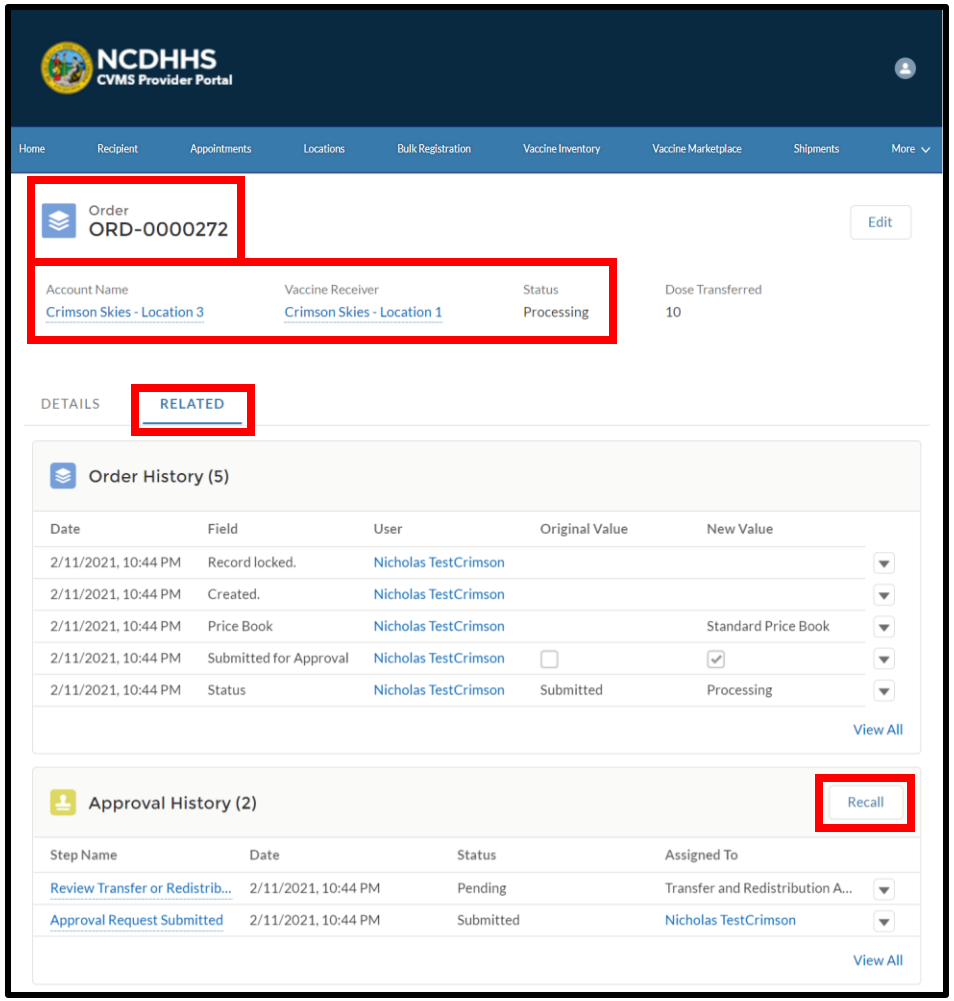




Audience

Healthcare Location Manager

Recalling Order Redistribution or Transfer Requests



Transfer requests can be **RECALLED** while in **PROCESSING** status. The recall function is only used when transferring between two locations in the same organization that do not have an existing redistribution agreement (Scenario #2 from the **Overview of an Outbound Redistribution/Transfer slide**). In any other scenario, the Healthcare Location Manager should use the **EDIT** capability.

1. Select the **VACCINE INVENTORY RECORD** that has a transfer request.
2. Navigate to the **RELATED** tab and select the Order Transfer Record that is still in **PROCESSING** status
3. Navigate to the **RELATED** tab on the Order Transfer Record
4. Scroll down to Approval History and click on **RECALL**
5. Add comments and click **RECALL**
6. **ORDER WAS RECALLED** will appear at the top of the screen

Audience

Healthcare Location Manager

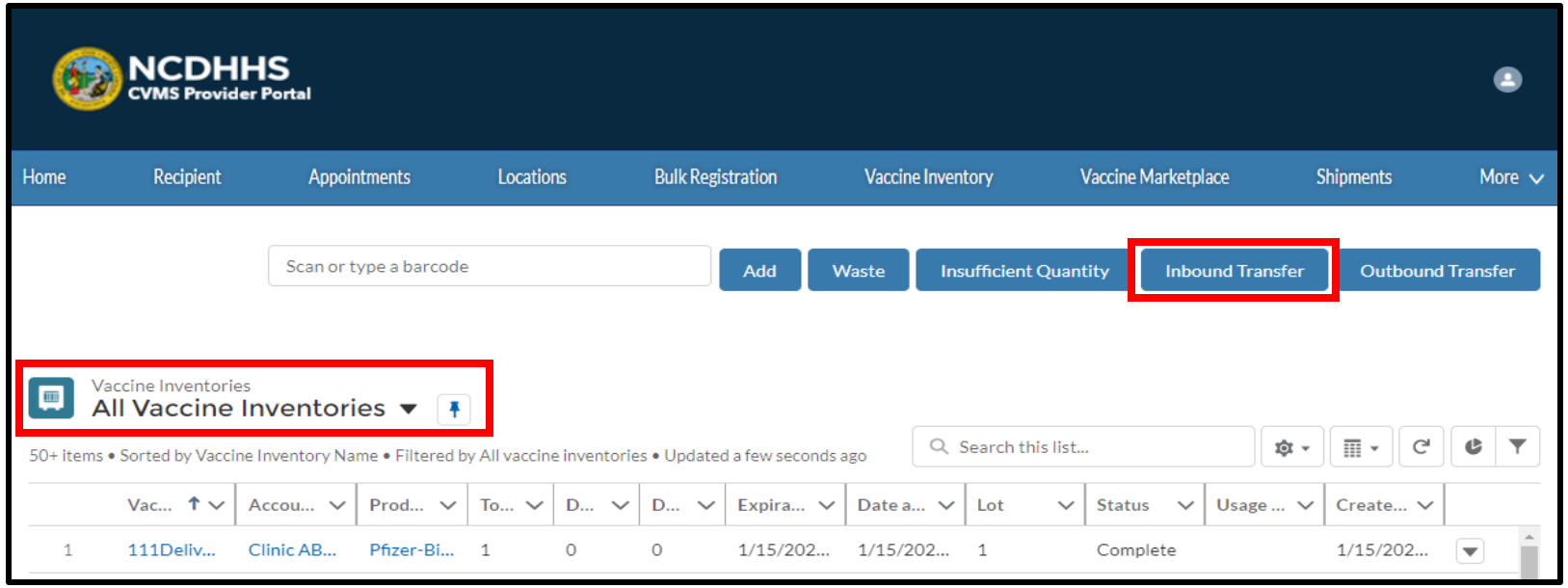
Receive Inbound Transfer or Redistribution

Step 1 of 4: Processing an Inbound Redistribution/Transfer

If you are **RECEIVING** an **INBOUND REDISTRIBUTION/TRANSFER** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound redistribution/transfer, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound redistributions/transfers from the **ADD INVENTORY PROCESS**.

1. From the home page, click **VACCINE INVENTORY**
2. Click **INBOUND TRANSFER**



Audience

Healthcare Location Manager

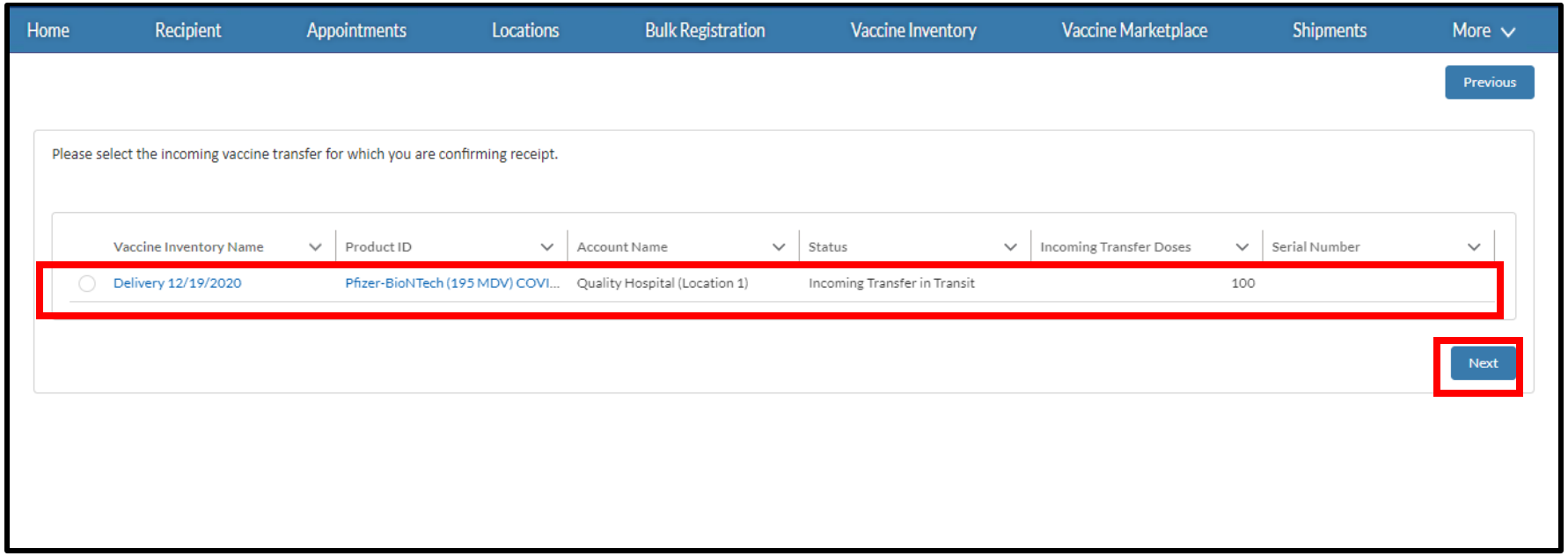
Tips

Inbound redistributions/ transfers are **not** processed from the Add Inventory Process.

Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** Records that are incoming redistributions/transfers to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

1. Select the correct **VACCINE INVENTORY** Record
2. Click **NEXT**



Audience

Healthcare Location Manager

Tips

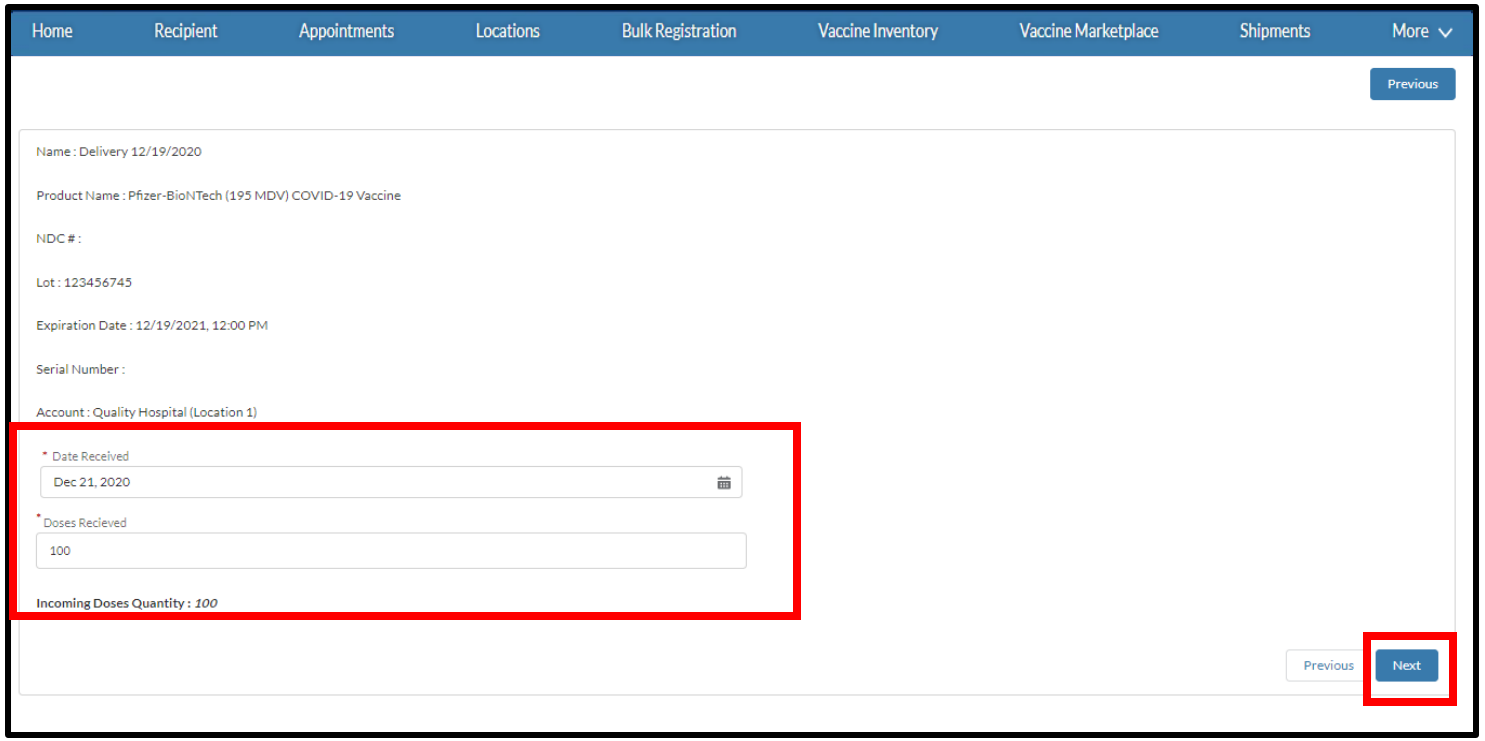
Identify Vaccine Inventory Records for inbound redistribution/transfer.

Step 3 of 4: Complete the Inbound Transfer form

Once you select the Vaccine Inventory Record, you will see the Vaccine Inventory details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound redistribution/transfer is now processed.

1. Enter the **DATE RECEIVED**
2. Enter the **DOSES RECEIVED**
3. Click **NEXT**



Audience

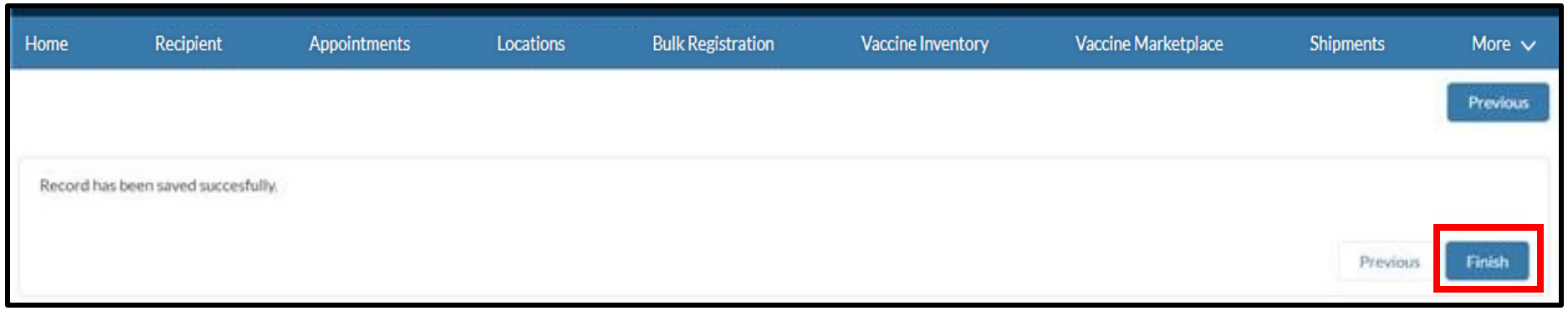
Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

Step 4 of 4: Complete the Inbound Transfer form

After clicking next, your inbound redistribution/transfer is processed and added to your inventory.

1. Click **FINISH**



Audience

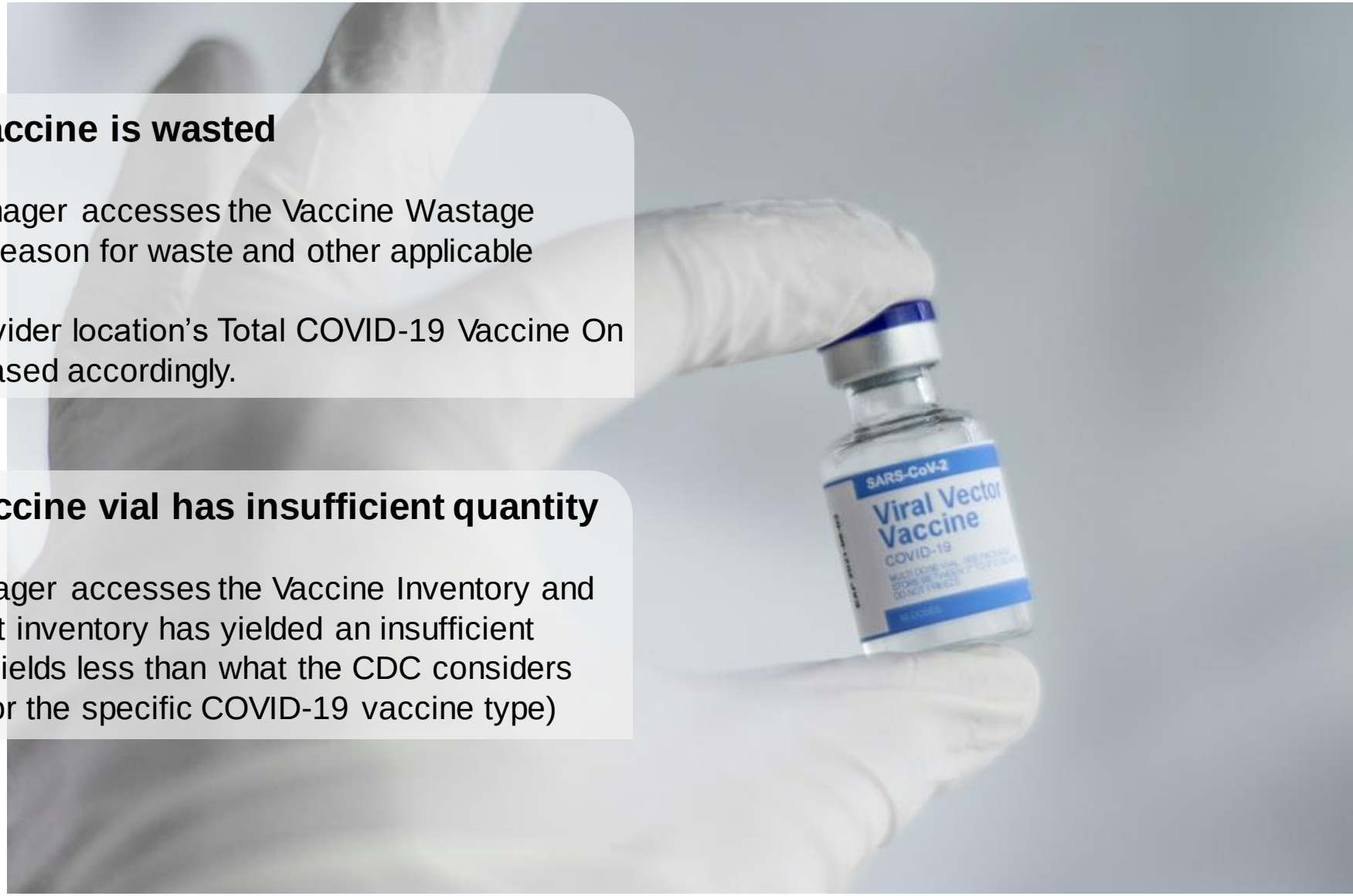
Healthcare Location Manager

Tips

Complete the inbound transfer form by clicking Finish.

Declaring Inventory Deprecation Events

When to declare in CVMS a COVID-19 Vaccine Inventory Deprecation



When a COVID-19 vaccine is wasted

Healthcare Location Manager accesses the Vaccine Wastage Survey Form, providing reason for waste and other applicable information.
Once submitted, the provider location's Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.

When a COVID-19 vaccine vial has insufficient quantity

Healthcare Location Manager accesses the Vaccine Inventory and inputs that a vial from that inventory has yielded an insufficient quantity (any time a vial yields less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type)

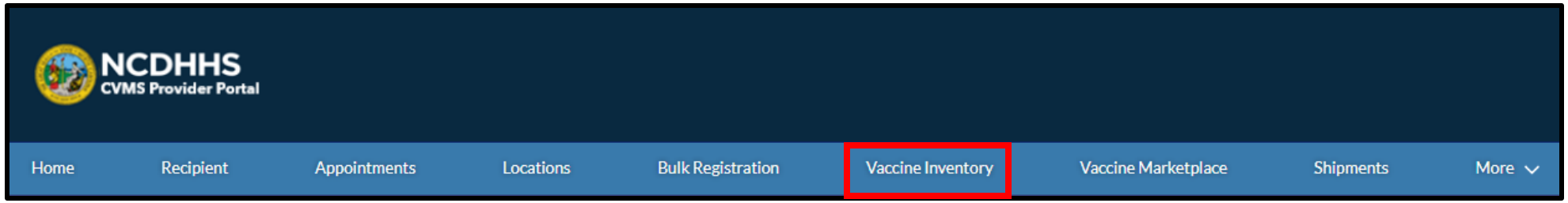
Log a Vaccine Wastage

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 vaccine inventory management guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE WASTAGE** events for all COVID-19 Vaccine Types in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Wastage will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Vaccine Wastage include breaking vial/syringe and lost COVID-19 vaccines.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



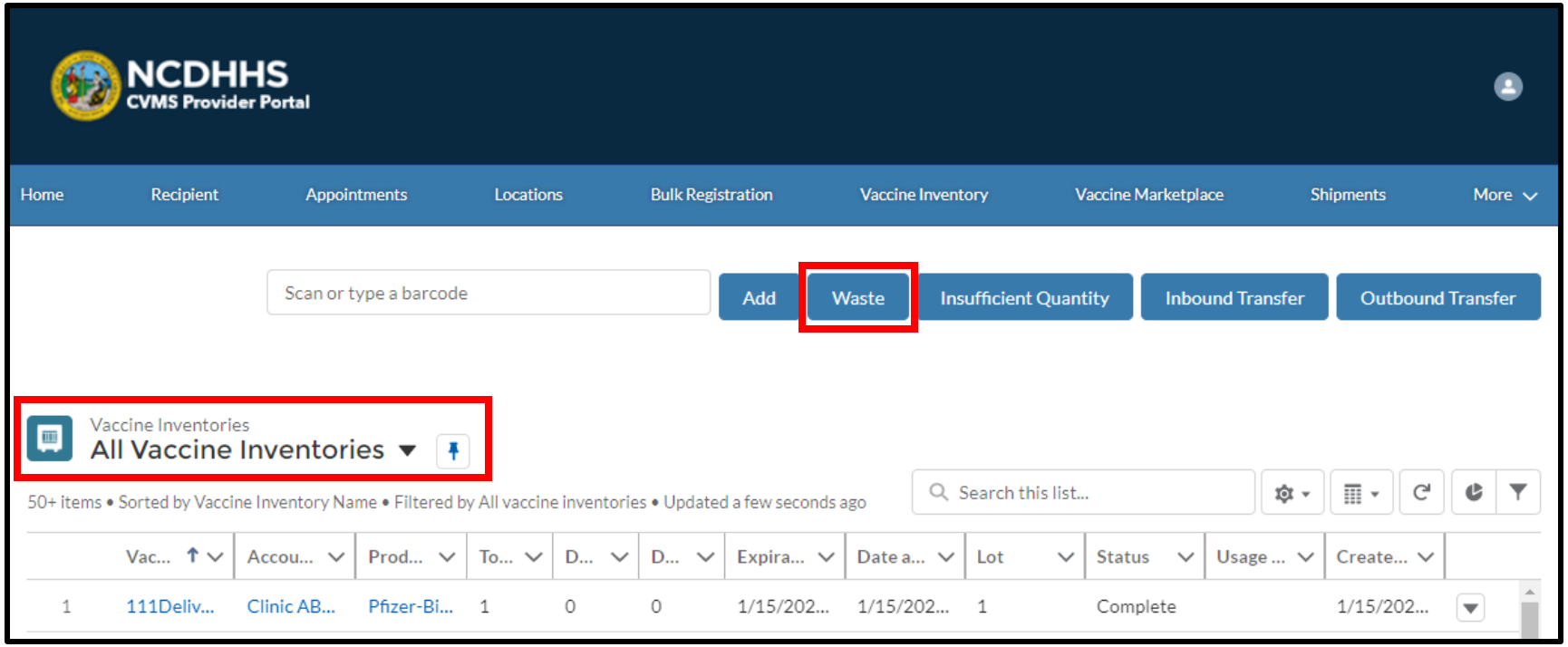
Audience

Healthcare Location Manager

Step 2 of 5: Open the Vaccine Wastage Survey form

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. The **ALL VACCINES LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

1. Click **WASTE** at the top of the page
2. After clicking **WASTE**, you will be directed to the **VACCINE WASTAGE SURVEY FORM**



Audience

Healthcare Location Manager

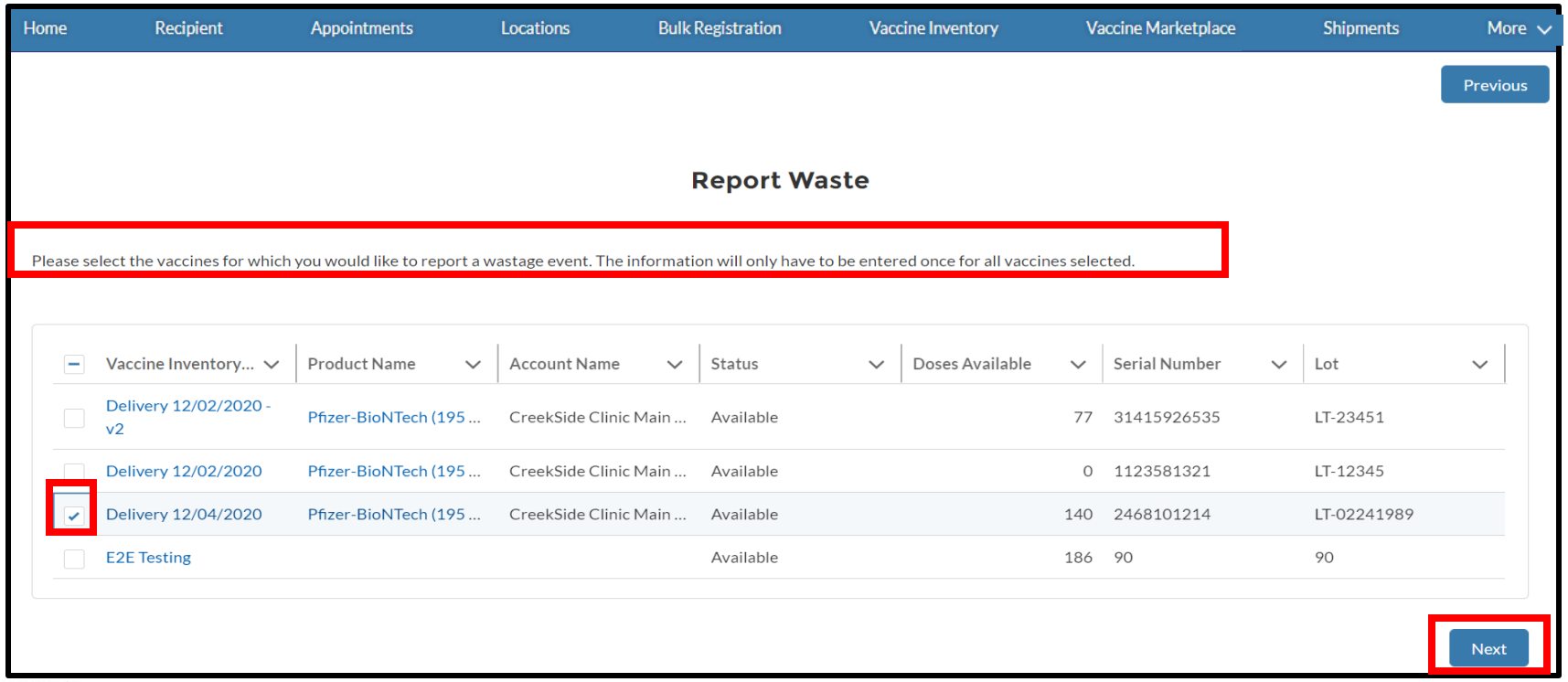
Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory Hyperlink.

Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report waste. At the bottom, you will see **ALL WASTAGE EVENTS** displaying all previously recorded COVID-19 vaccine inventory waste.

1. Check the **BOX** for the **APPROPRIATE ROW(S)**
2. Click **NEXT** at the bottom of the page
3. After clicking **NEXT**, you will see the **VACCINE WASTAGE SURVEY FORM**



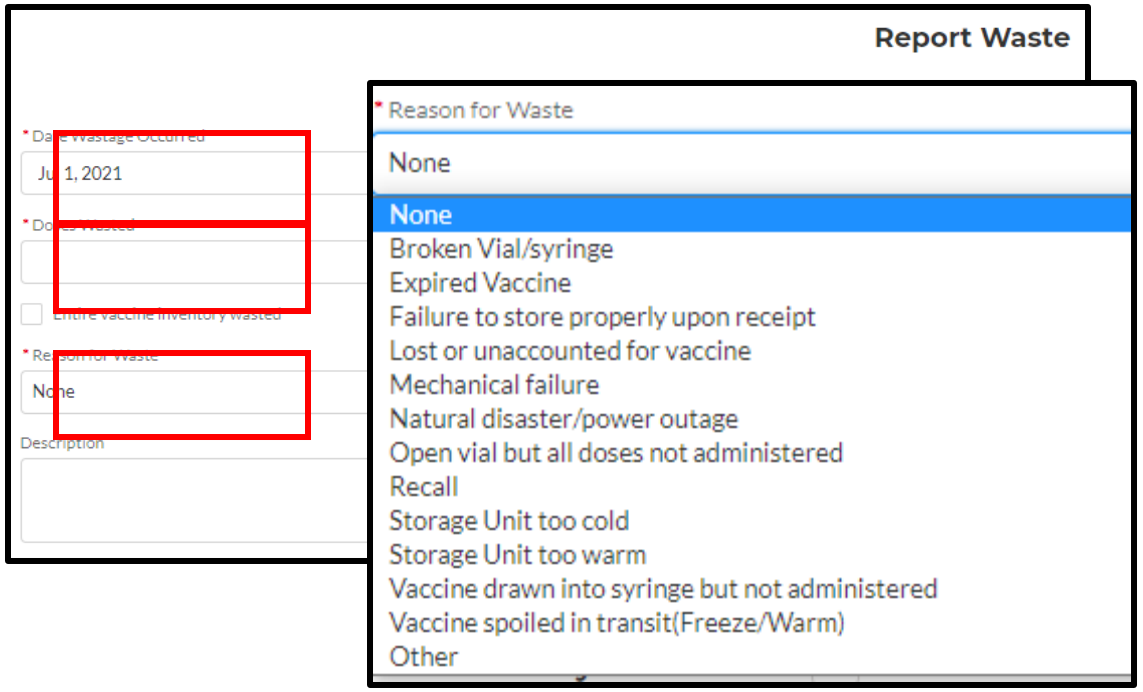
Audience

Healthcare Location Manager

Tips

You will be able to report a Partial or Full Vaccine shipment wastage on the next page.

Step 4 of 5: Complete the Vaccine Wastage Survey form



Note: If you have selected a Moderna vaccine inventory record, you can enter either a whole number or half doses (annotated with .5).

Clinical rules require providers to discard vials after 20 needle punctures. In these cases, any remaining doses in Moderna vials would be logged as wastage. Document it as **OTHER** and enter the reason in the comments.

1. Populate the required **REPORT WASTE FIELDS:**
    1. Date Wastage Occurred
    2. Doses Wasted
    3. If you want to report the entire Vaccine Inventory wasted, check the Entire Vaccine Inventory Wasted Checkbox.
    4. Reason for Waste
2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once you are ready to submit the form, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

Audience

Healthcare Location Manager

Tips

If an inventory reaches expiration, you can check **ENTIRE VACCINE INVENTORY WASTED** then select **EXPIRED VACCINE** from the dropdown. This will change your available doses to zero.

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Step 5 of 5: Submit the Vaccine Wastage Survey form

The **VACCINE WASTAGE RECORD** is now submitted, and your COVID-19 Vaccine Inventory Record will be automatically updated.

1. Click **FINISH**
2. After clicking **FINISH**, you will be directed back to the **INITIAL VACCINE WASTAGE SURVEY FORM PAGE**

Audience

Healthcare Location Manager

Tips

After clicking **FINISH**, you will see your Vaccine Wastage Record displayed on the All Wastage List View.

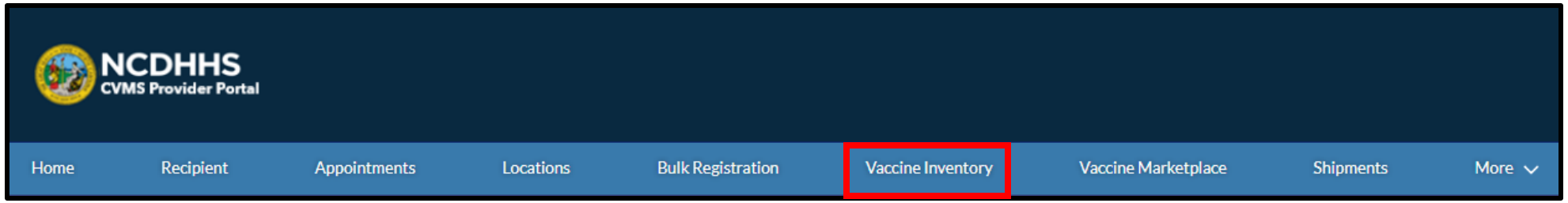
Log Insufficient Quantity

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 Vaccine Inventory Management Guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE INSUFFICIENT QUANTITY** events for all COVID-19 Vaccine Types in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Insufficient Quantity will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Insufficient Quantity events include any time less than the CDC standard doses are obtained from a vial for that specific vaccine manufacturer.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



Audience

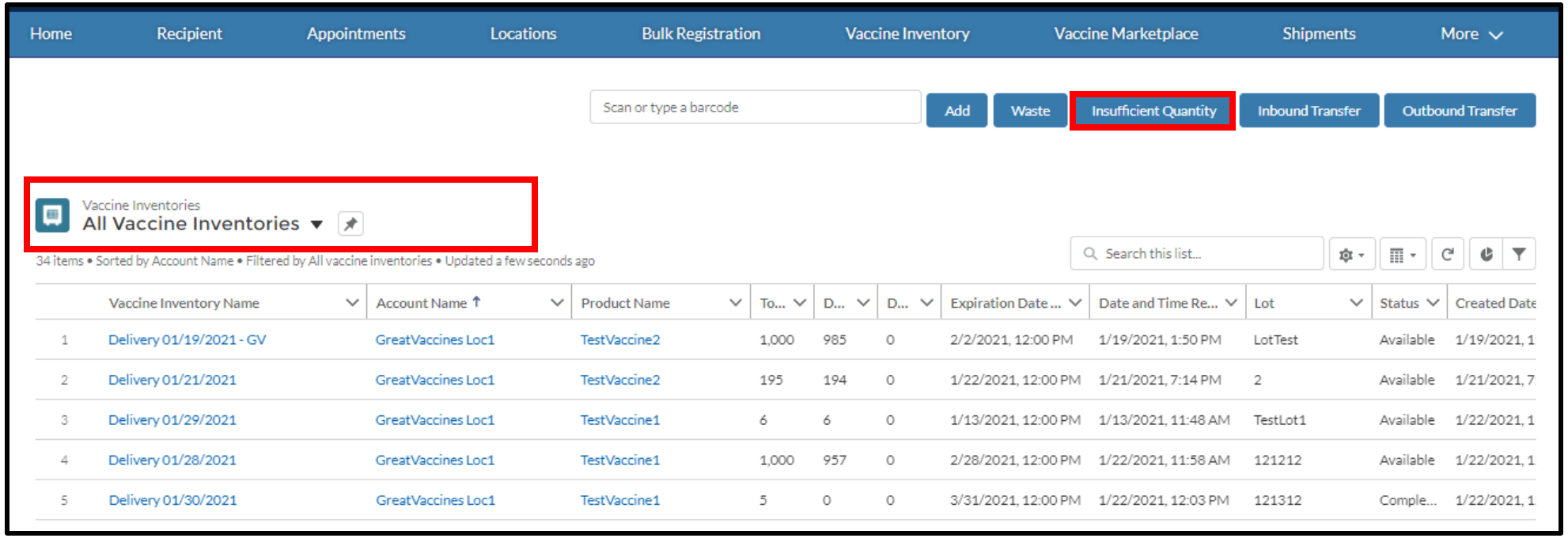
Healthcare Location Manager

Step 2 of 5: Click Insufficient Quantity at the top of the page

At the top of the page, you will see the different actions you can take to manage your COVID-19 Vaccine Inventory Records. The **ALL VACCINE INVENTORY LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory Records.

To record an Insufficient Quantity event:

1. Click **INSUFFICIENT QUANTITY** at the top of the page
2. After clicking **INSUFFICIENT QUANTITY**, you will be directed to the **VACCINE INSUFFICIENT QUANTITY** page



Audience

Healthcare Location Manager

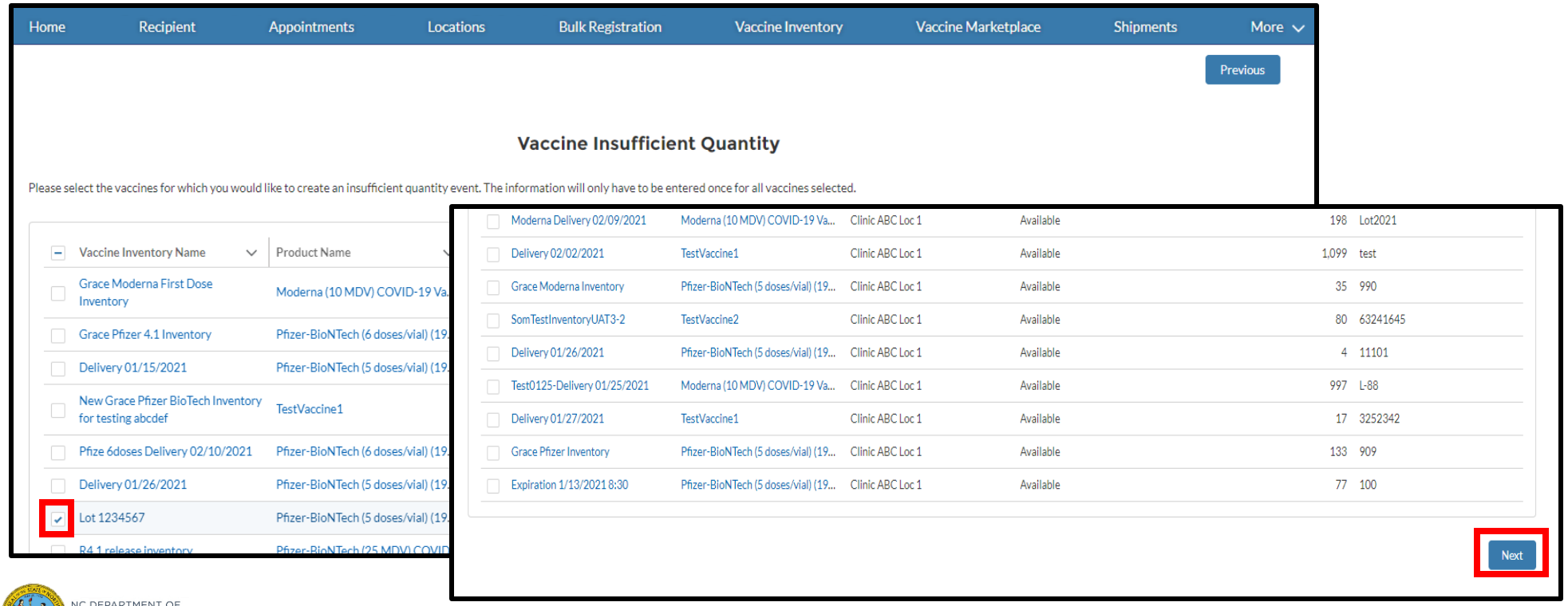
Tips

To see more details for a specific Vaccine Inventory Record, click the Vaccine Inventory hyperlink.

Step 3 of 5: Find the appropriate vaccine(s) on the list

Once you are directed to the **VACCINE INSUFFICIENT QUANTITY** page, you will be directed to select **ONE OR MORE** Vaccine Inventory Records to report an insufficient quantity.

1. Check the **BOX** for the appropriate **VACCINE INVENTORIES**
2. Click **NEXT** at the bottom of the page
3. After clicking **NEXT**, you will see the **VACCINE INSUFFICIENT QUANTITY SURVEY FORM**



Audience

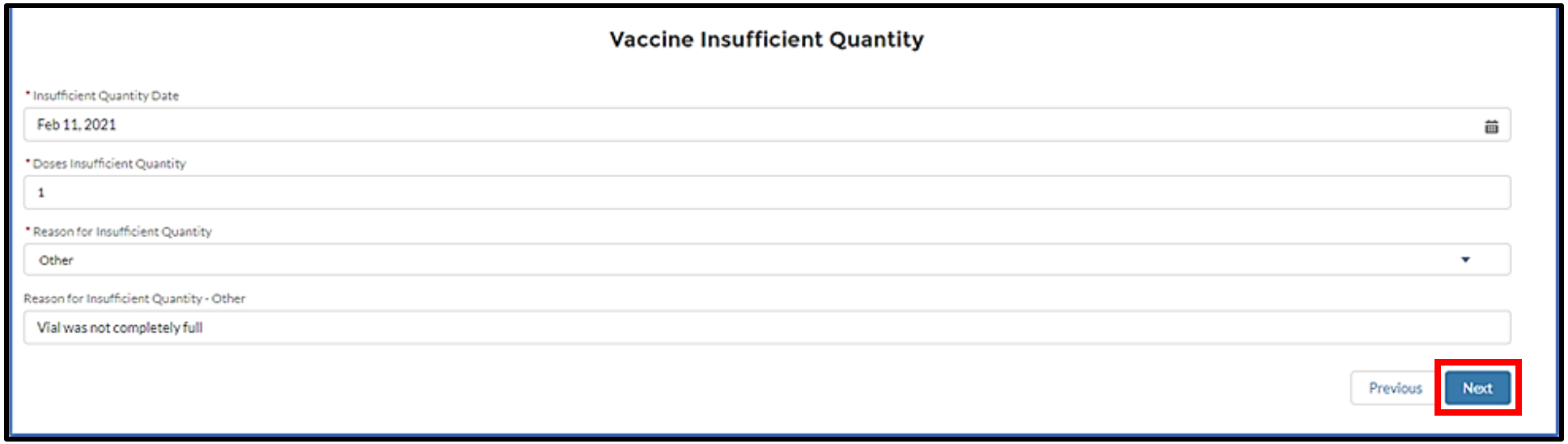
Healthcare Location Manager

Tips

You will only be able to record insufficient quantity events for the same vaccine product if you choose to select more than one Vaccine Inventory Record.

Step 4 of 5: Complete the Vaccine Insufficient Quantity Survey form

1. Populate the required **REPORT INSUFFICIENT QUANTITY FIELDS:**
    1. Insufficient Quantity Date
    2. Doses Insufficient Quantity
    3. Select the appropriate reason from the drop-down
2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once you are ready to submit the form, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**



Audience

Healthcare Location Manager

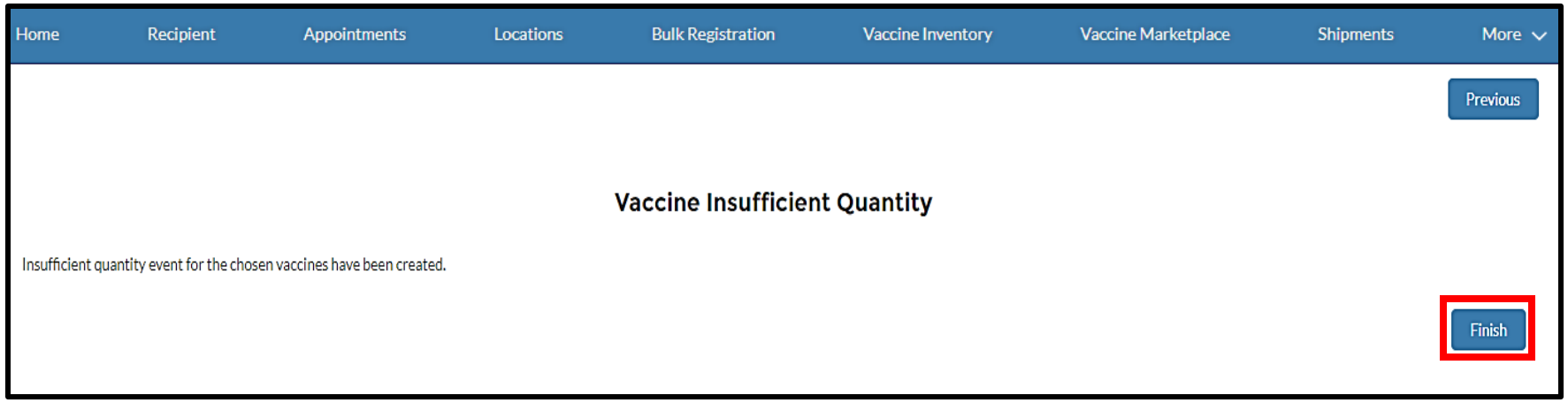
Tips

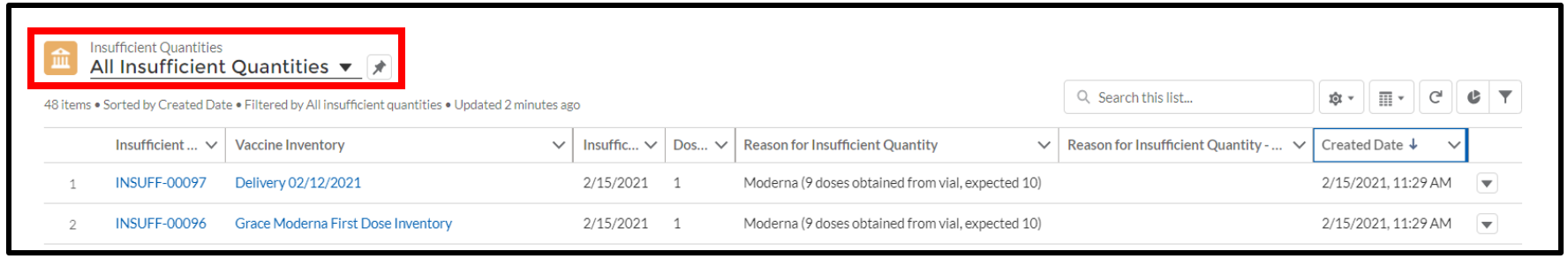
For **Doses Insufficient Quantity**, select the number of doses missing from each vial.

Step 5 of 5: Submit the Vaccine Insufficient Quantity Survey form

The **VACCINE INSUFFICIENT QUANTITY RECORD** is now submitted, and your COVID-19 Vaccine Inventory Records will be automatically updated.

1. Click **FINISH**
2. After you click **FINISH**, you will see the Vaccine Insufficient Quantity record displayed on the **ALL INSUFFICIENT QUANTITIES LIST VIEW**





Audience

Healthcare Location Manager

Tips

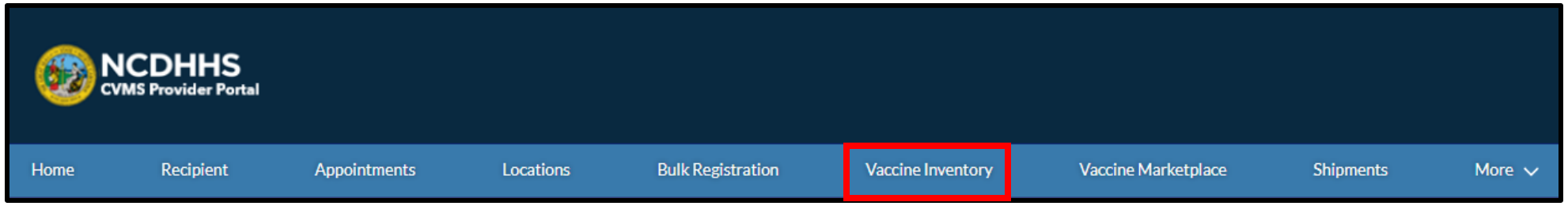
After clicking **FINISH**, you will see your Vaccine Insufficient Quantity record displayed on the **All Insufficient Quantities List View.**

Edit Deprecation Events

Step 1 of 4: Navigate to the Vaccine Inventory tab

In the event that a deprecation event was incorrectly entered, the event record can be edited to reflect the corrected information.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



Audience

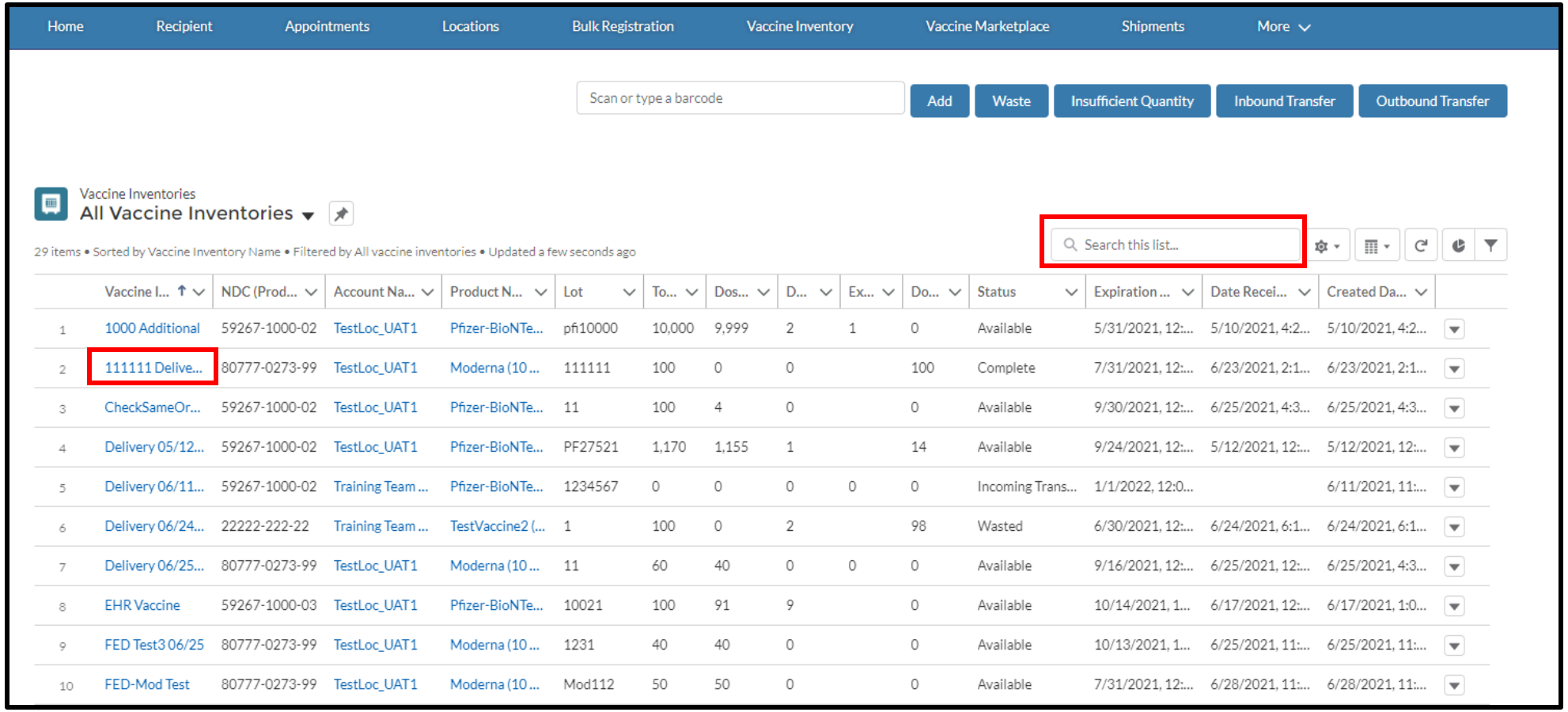
Healthcare Location Manager

Tips

The process for editing both Wastage and Insufficient Quantities is identical.

Step 2 of 4: Select the Vaccine Inventory to be Corrected

1. Search the list
2. Select the Vaccine Inventory Record to edit

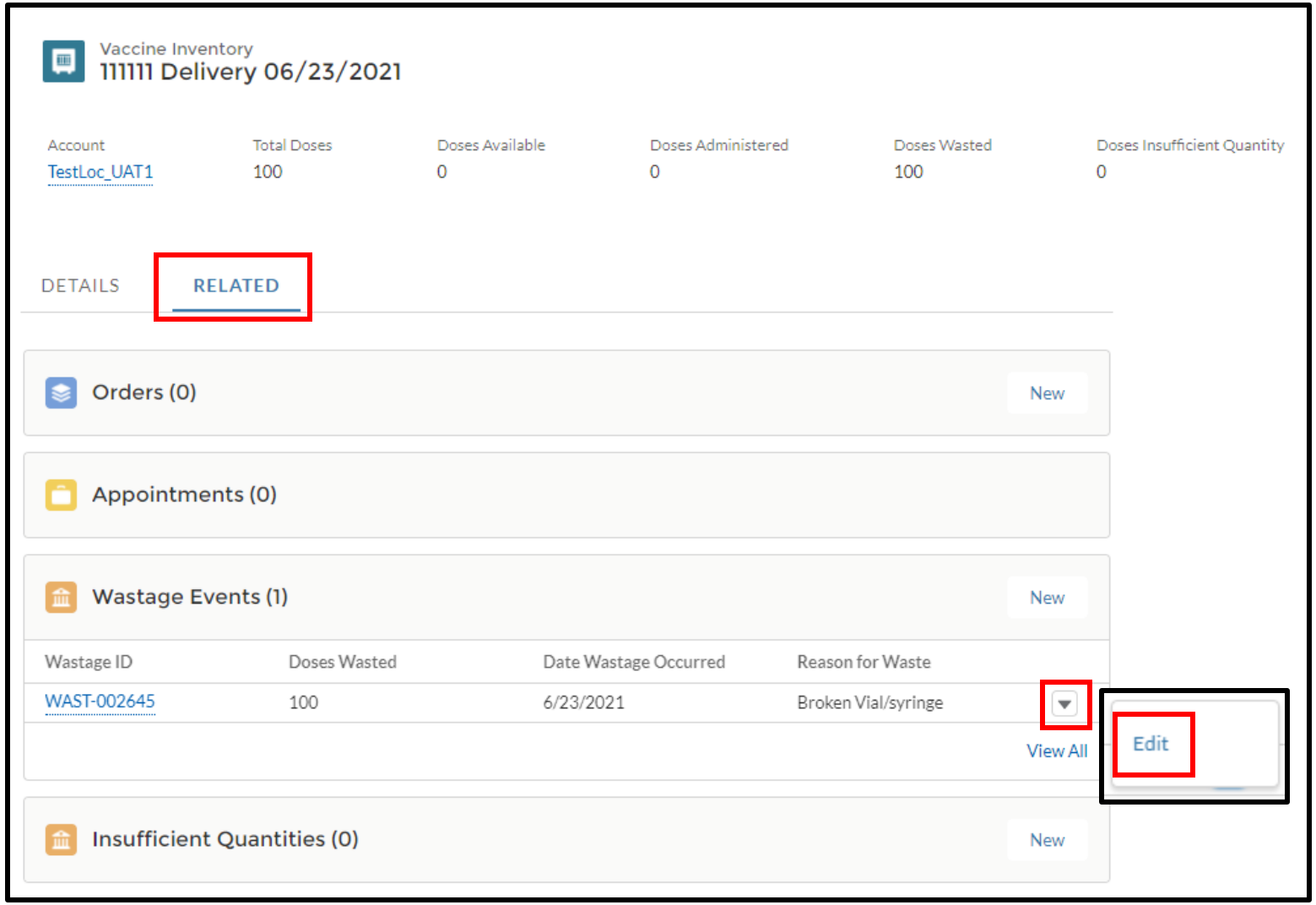


	Vaccine I...	NDC (Prod...	Account Na...	Product N...	Lot	To...	Dos...	D...	Ex...	Do...	Status	Expiration ...	Date Recei...	Created Da...
1	1000 Additional	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	pfi10000	10,000	9,999	2	1	0	Available	5/31/2021, 12:...	5/10/2021, 4:2...	5/10/2021, 4:2...
2	111111 Delive...	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	111111	100	0	0		100	Complete	7/31/2021, 12:...	6/23/2021, 2:1...	6/23/2021, 2:1...
3	CheckSameOr...	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	11	100	4	0		0	Available	9/30/2021, 12:...	6/25/2021, 4:3...	6/25/2021, 4:3...
4	Delivery 05/12...	59267-1000-02	TestLoc_UAT1	Pfizer-BioNTe...	PF27521	1,170	1,155	1		14	Available	9/24/2021, 12:...	5/12/2021, 12:...	5/12/2021, 12:...
5	Delivery 06/11...	59267-1000-02	Training Team ...	Pfizer-BioNTe...	1234567	0	0	0	0	0	Incoming Trans...	1/1/2022, 12:0...		6/11/2021, 11:...
6	Delivery 06/24...	22222-222-22	Training Team ...	TestVaccine2 (...	1	100	0	2		98	Wasted	6/30/2021, 12:...	6/24/2021, 6:1...	6/24/2021, 6:1...
7	Delivery 06/25...	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	11	60	40	0	0	0	Available	9/16/2021, 12:...	6/25/2021, 12:...	6/25/2021, 4:3...
8	EHR Vaccine	59267-1000-03	TestLoc_UAT1	Pfizer-BioNTe...	10021	100	91	9		0	Available	10/14/2021, 1...	6/17/2021, 12:...	6/17/2021, 1:0...
9	FED Test3 06/25	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	1231	40	40	0		0	Available	10/13/2021, 1...	6/25/2021, 11:...	6/25/2021, 11:...
10	FED-Mod Test	80777-0273-99	TestLoc_UAT1	Moderna (10 ...	Mod112	50	50	0		0	Available	7/31/2021, 12:...	6/28/2021, 11:...	6/28/2021, 11:...

Audience

Healthcare Location Manager

Step 3 of 4: Navigate to the Related Tab



1. From the Vaccine Inventory Record, navigate to the **RELATED** Tab
2. Find the deprecation event to edit (under **WASTAGE EVENTS** or **INSUFFICIENT QUANTITIES**)
3. Navigate to the Action Arrow and click **EDIT**

Audience

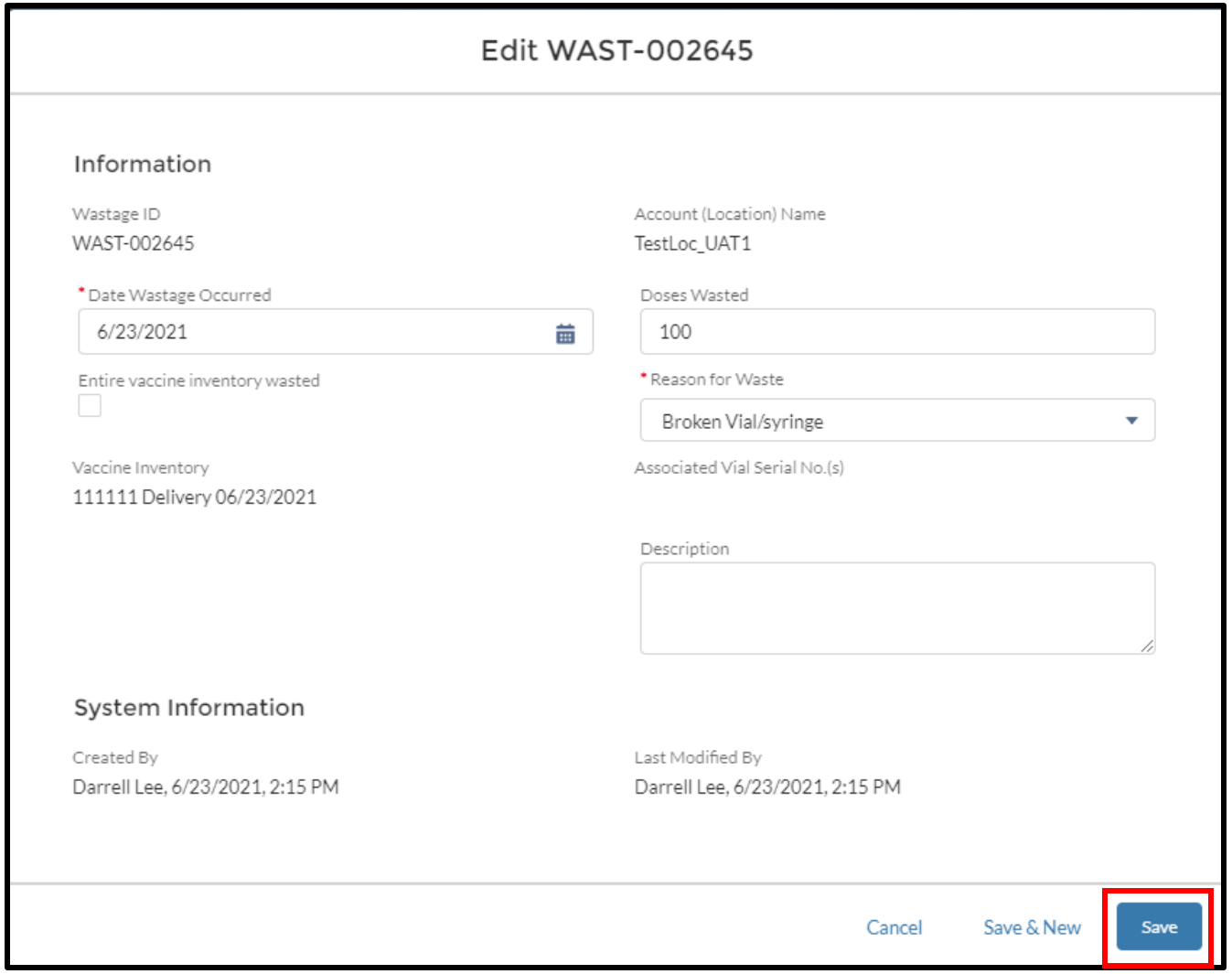
Healthcare Location Manager

Tips

New deprecation events can also be created by clicking **NEW.**

Step 4 of 4: Complete the Edit

1. Complete the edit(s)
2. Click **SAVE**



Audience

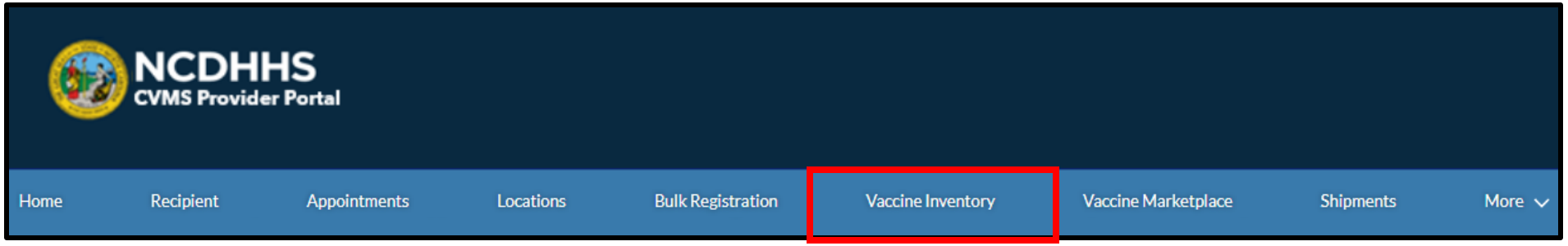
Healthcare Location Manager

Other Inventory Operations Available in CVMS

Edit or Update Vaccine Inventory Record Details

Step 1 of 3: Navigate to the Vaccine Inventory tab

1. At the top of your home page, locate the **VACCINE INVENTORY** tab
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY** list view



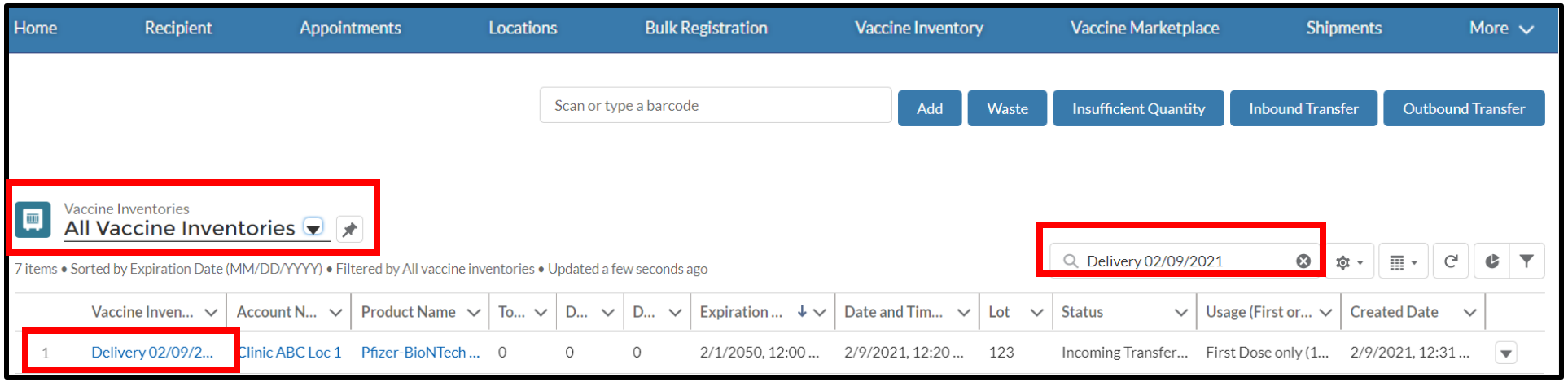
Audience

Healthcare Location Manager

Step 2 of 3: Navigate to Vaccine Inventory Record

Use the All Vaccine Inventories List View to locate the specific record you need to update. You can **SEARCH or SORT** in the list view.

1. Identify the **VACCINE INVENTORY RECORD** that you wish to update
2. Click the **VACCINE INVENTORY NAME HYPERLINK**

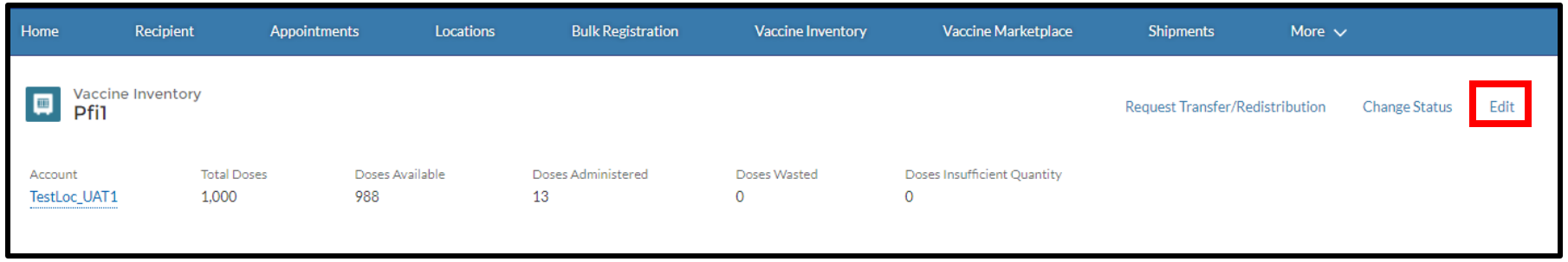


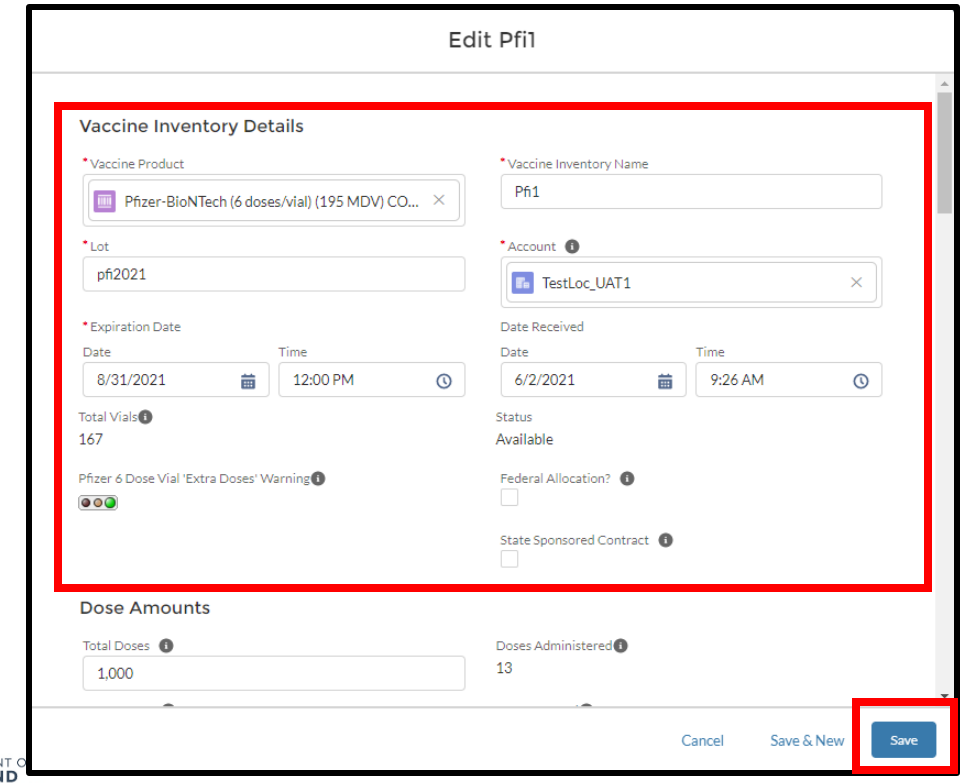
Audience

Healthcare Location Manager

Step 3 of 3: Update the Vaccine Inventory Record

Before you edit, make sure you are on the appropriate record.





Remember, you must always save your changes.

1. Click the **EDIT BUTTON** on the right-hand side
2. Locate the field you want to make changes to
3. Update the field
4. Click **SAVE**
5. If the field does not update, click **REFRESH** and try again

Audience

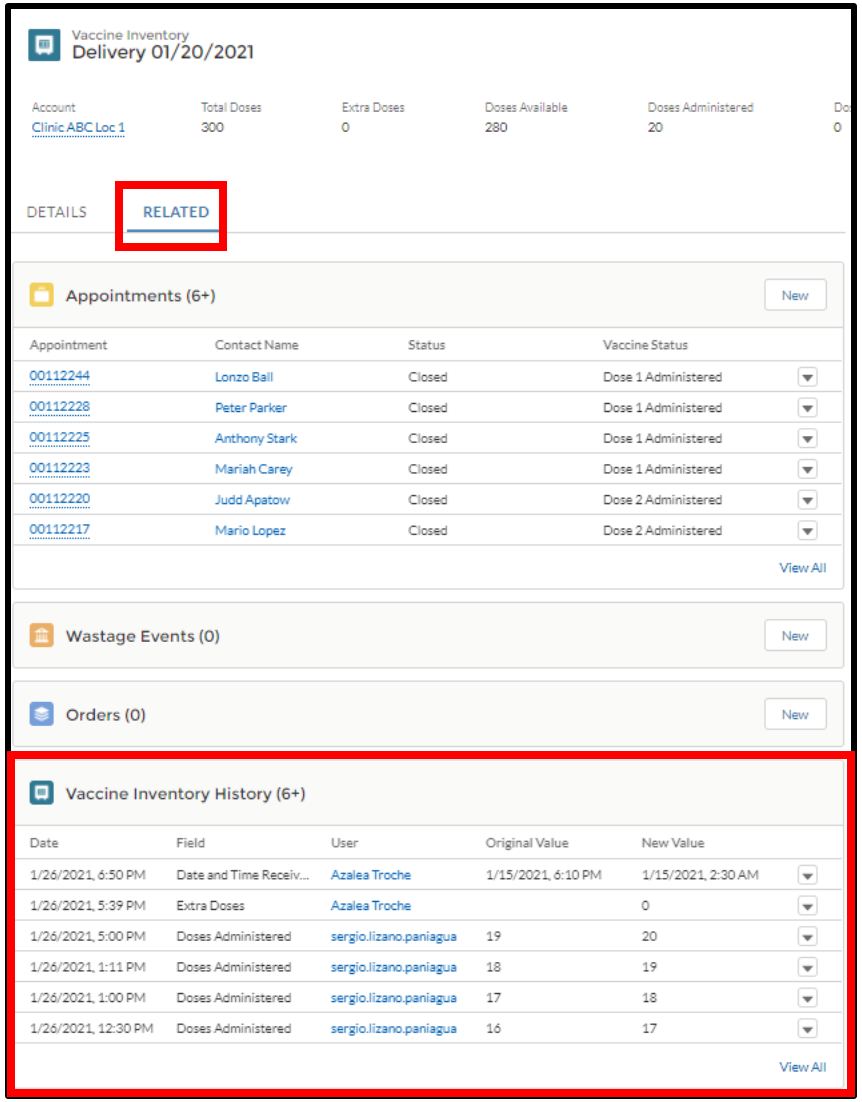
Healthcare Location Manager

Tips

Vaccine Inventory Status can be edited by Completing the Vaccine Inventory (Review next section).

If additional doses of the Vaccine Inventory are identified, use the Extra Doses field to edit that Inventory directly.

Reviewing Vaccine Inventory History



All changes and edits made to the Vaccine Inventory Record are captured within the CVMS Provider Portal in the Vaccine Inventory History.

1. From the Vaccine Inventory Record, click on the **RELATED** tab.
2. Scroll down to **VACCINE INVENTORY HISTORY**
3. Review all Vaccine Inventory History

Click View All to look at all the Vaccine Inventory History changes made to the record.

Audience

Healthcare Location Manager

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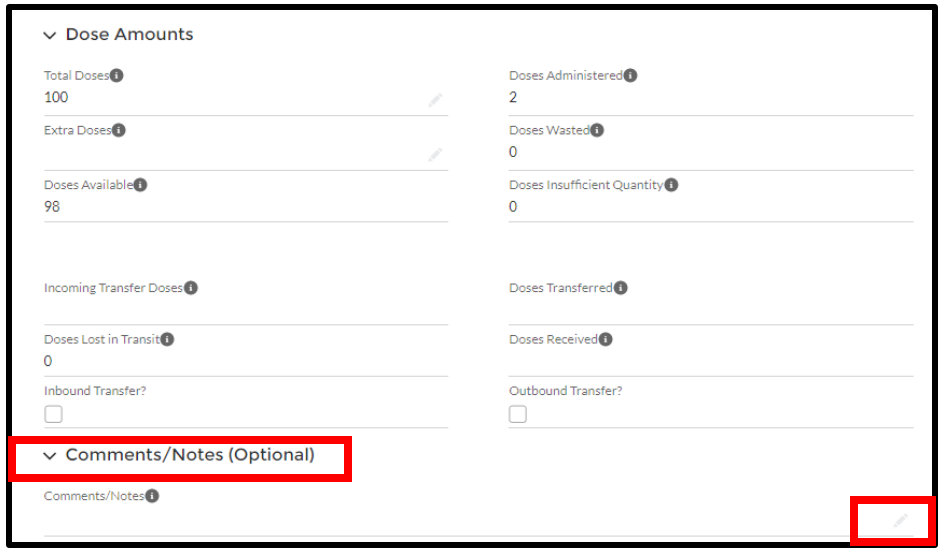
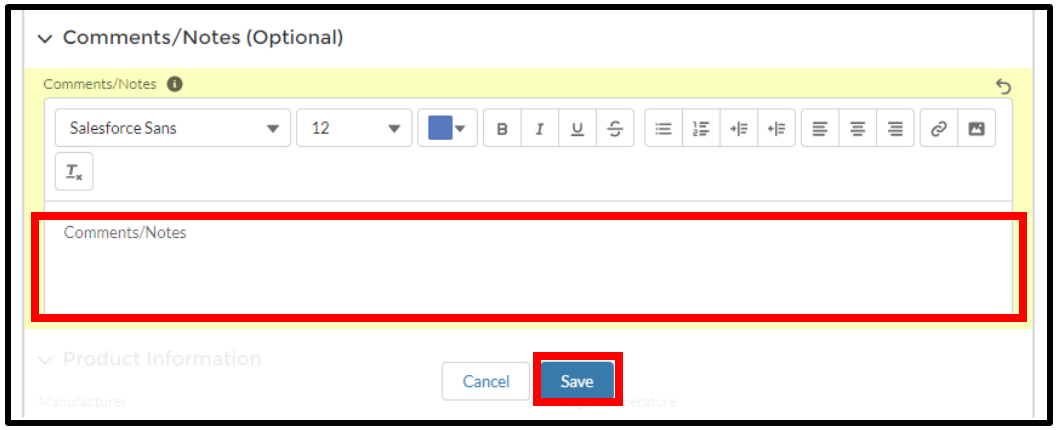
Adding Comments/Notes to a Vaccine Inventory Record





Any comments/notes related to the Vaccine Inventory record can be captured in the **COMMENTS/NOTES** field.

1. From the Vaccine Inventory Record, scroll down to the **COMMENTS/NOTES (OPTIONAL) SECTION**
2. Click the pencil icon to edit
3. Add any comments/notes in the free text field and click **SAVE**

Audience

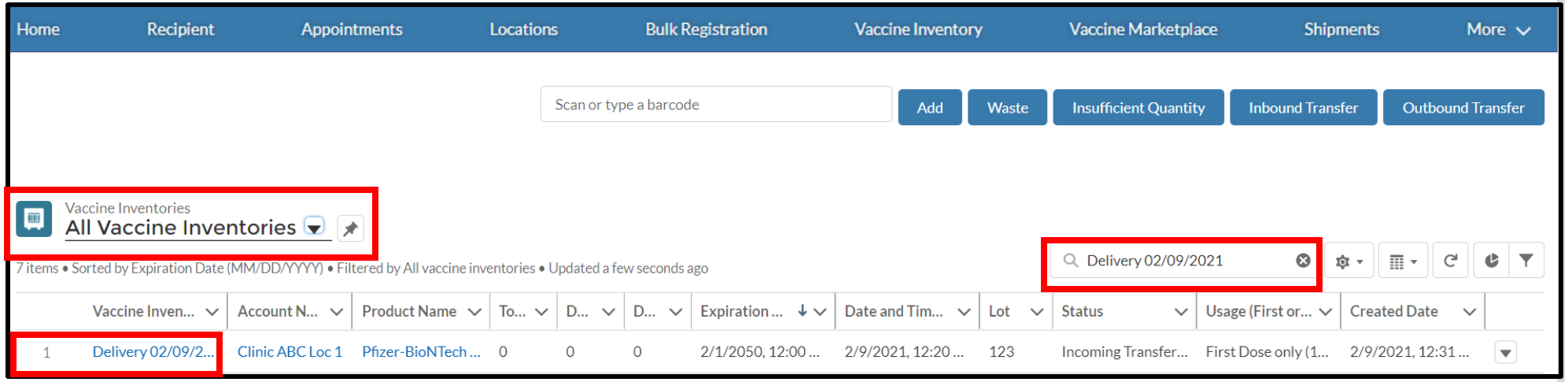
Healthcare Location Manager

Mark a Vaccine Inventory as Complete or Reserved for Future Use

Step 1 of 3: Navigate to Vaccine Inventory Record

When a Vaccine Inventory record has zero available dose left, and no extra dose can be extracted from the vials, you will be able to update the Vaccine Inventory record status as Complete. This will help the NCDHHS allocation team to identify which Vaccine Inventory records do not have any remaining doses to be administered.

1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORD** that you wish to update
2. Click the **VACCINE INVENTORY NAME HYPERLINK**

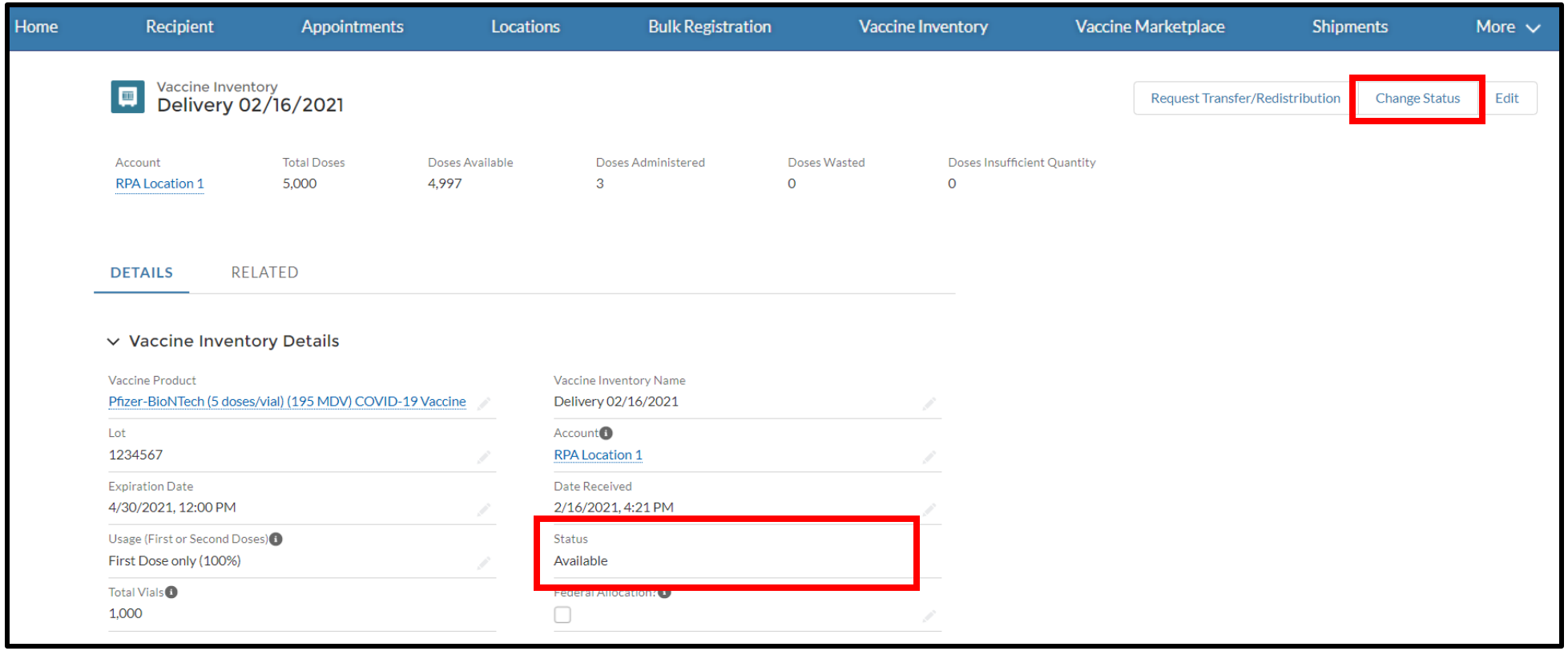


Audience

Healthcare Location Manager

Step 2 of 3: Click the Change Status Button

1. At the top of the Vaccine Inventory page, locate the **CHANGE STATUS** button
2. Click the **CHANGE STATUS** button



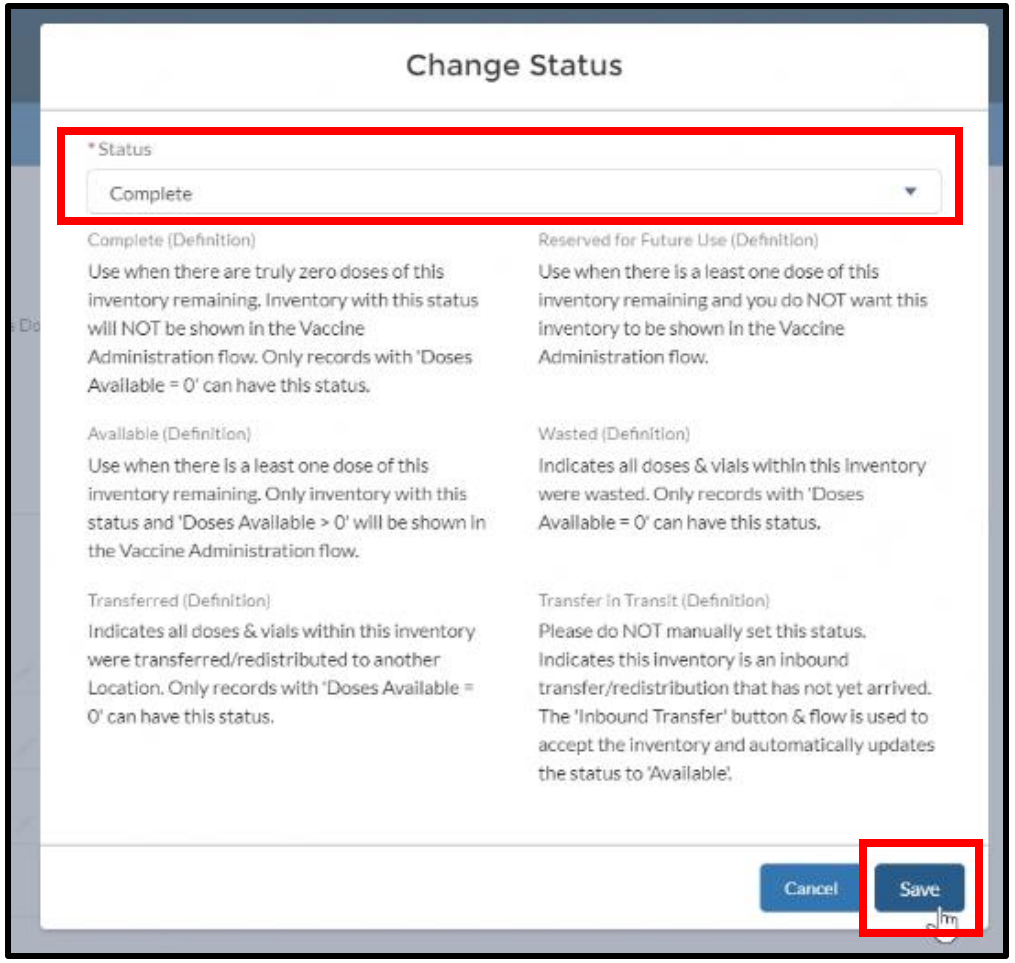
Audience

Healthcare Location Manager

Step 3 of 3: Select the Complete Status & Save

You will be prompted to update the **STATUS**. Once you save your changes, the Vaccine Inventory status will update accordingly. Definitions for each status are provided on this screen to ensure you select the appropriate **STATUS**.

1. Select the appropriate **STATUS**
   - Complete
   - Reserved for Future Use
   - Available
   - Transferred
   - Wasted
   - Incoming Transfer in Transit
2. Click **SAVE**



Audience

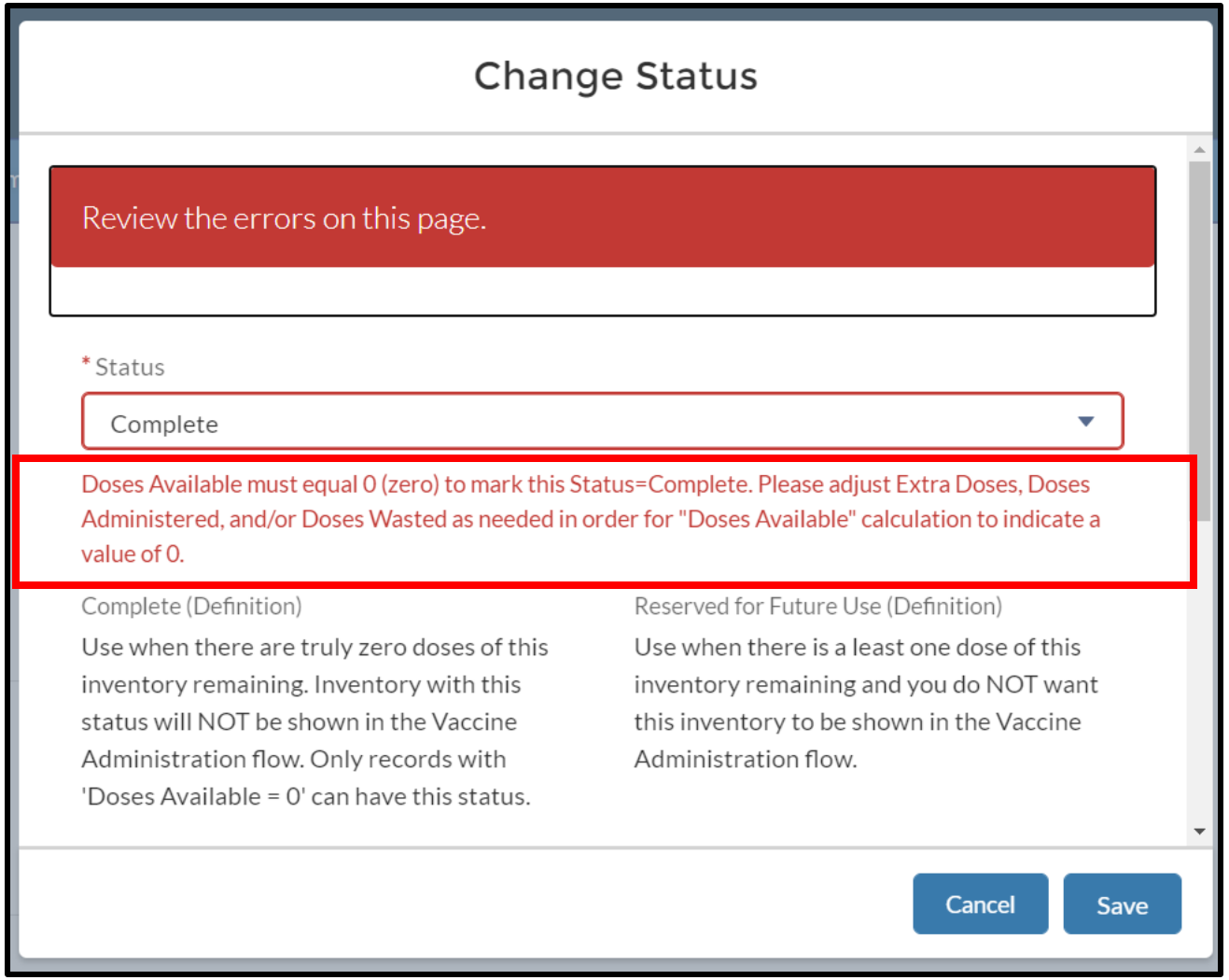
Healthcare Location Manager

Tips

Use this feature to update the Vaccine Inventory status to Complete when you have zero doses available.

Failed Complete Status Update

The alert screen below will be displayed if your doses available does not equal 0. You will be unable to update the Vaccine Inventory Status to Complete until the appropriate adjustments are made to your Vaccine Inventory. Once resolved, you can go back and Complete the Vaccine Inventory Status.

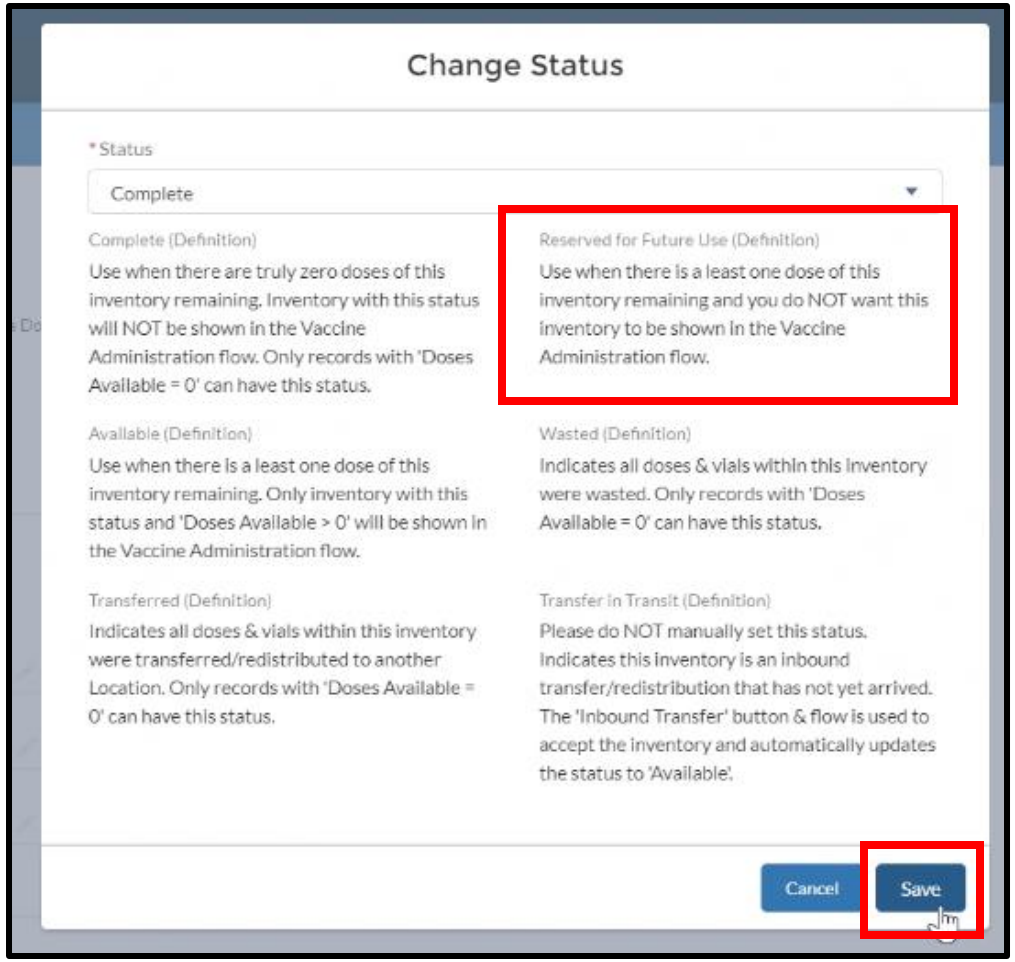


Audience

Healthcare Location Manager

Reserved for Future Use Status

Putting a Vaccine Inventory Record in the **RESERVED FOR FUTURE USE** status will remove it from being displayed on the vaccination administration screen for Healthcare Providers to select when vaccinating recipients.



Audience

Healthcare Location Manager

Tips

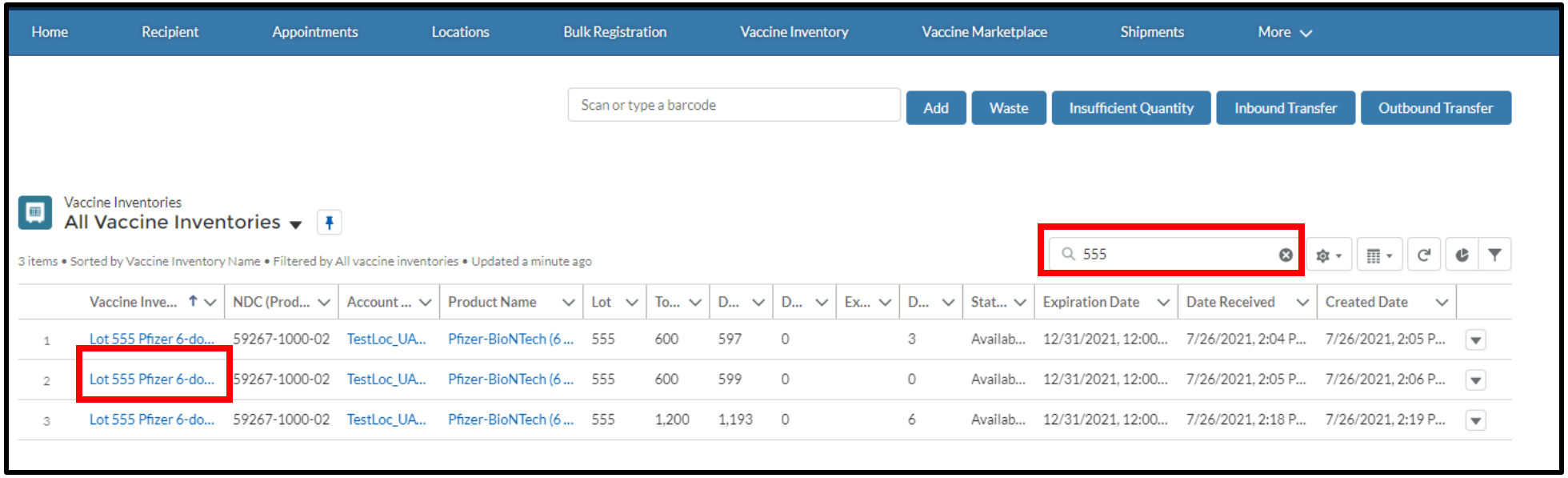
This status may be helpful to flag Inventory Records at a location that should not be selected by Healthcare Providers when vaccinating recipients (e.g., reserved for second dose, reserved for upcoming mass vaccination clinic, flagged for transfer or redistribution).

Consolidate Available Doses from Multiple Vaccine Inventory Records in a Single Inventory Record

Step 1 of 4: Navigate to Vaccine Inventory Record to Consolidate

To reduce the number of vaccine inventory records and to aid with vaccine management, all inventory records for the same product from the same lot can have the available doses consolidated into a single record. To do so, follow these instructions:

1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORDS** that you wish to increase with available doses from other inventory records
2. Click the **VACCINE INVENTORY NAME HYPERLINK** to open it



Audience

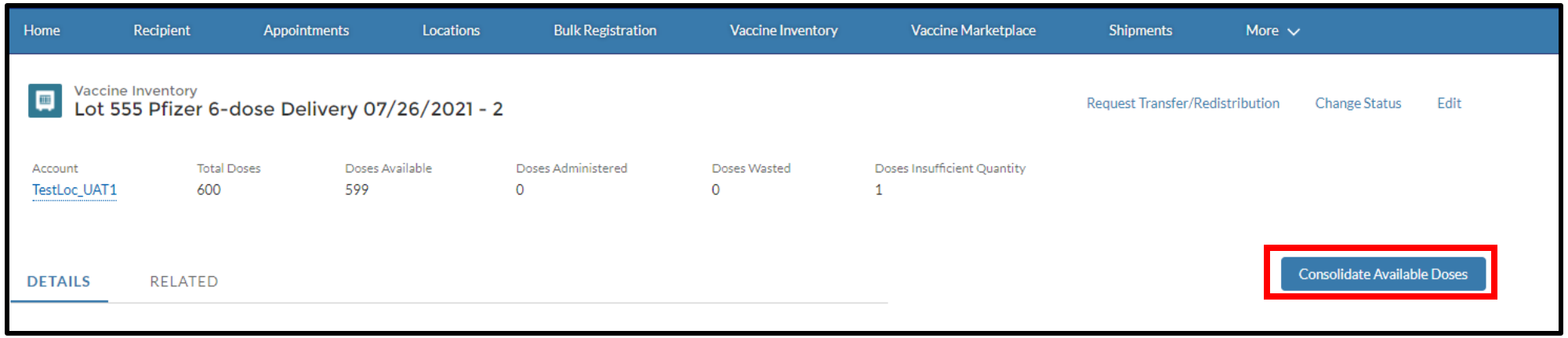
Healthcare Location Manager

Tips

Use the search feature to search the lot number. The recommended best practice of entering the lot number to each vaccine inventory record name helps ensure that all inventory records from the desired lot to consolidate will be displayed.

Step 2 of 4: Open the Consolidate Available Doses Feature

1. Click on **CONSOLIDATE AVAILABLE DOSES**

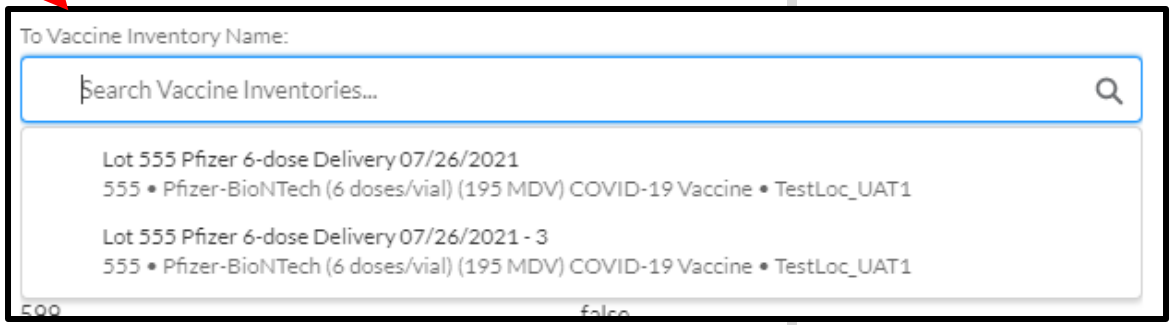


Audience

Healthcare Location Manager

Step 3 of 4: Consolidate the Records

1. Select the **VACCINE INVENTORY NAME** for the record(s) to consolidate
2. Click **FINISH**
3. Repeat Step 2 and 3 if you wish to consolidate more records
4. The inventory selected in this step will have its number of Available Doses reduced to 0, while the available doses of the inventory selected in the previous step will be increased by the same amount.



Audience

Healthcare Location Manager

Tips

If consolidating State and Federal allocations, make sure to consolidate doses **FROM** the Federal Vaccine Inventory record **TO** the State Vaccine Inventory Record.

Step 4 of 4: Check Consolidated Inventories

After the records have been consolidated, the available doses are all transferred from the other records.

Notice that those vaccine inventory records still exist and still maintain their own history to include deprecation events. These records can now be marked as “complete”.

Audience

Healthcare Location Manager

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

Scan or type a barcode | Add | Waste | Insufficient Quantity | Inbound Transfer | Outbound Transfer

Vaccine Inventories
All Vaccine Inventories

3 items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated 6 minutes ago

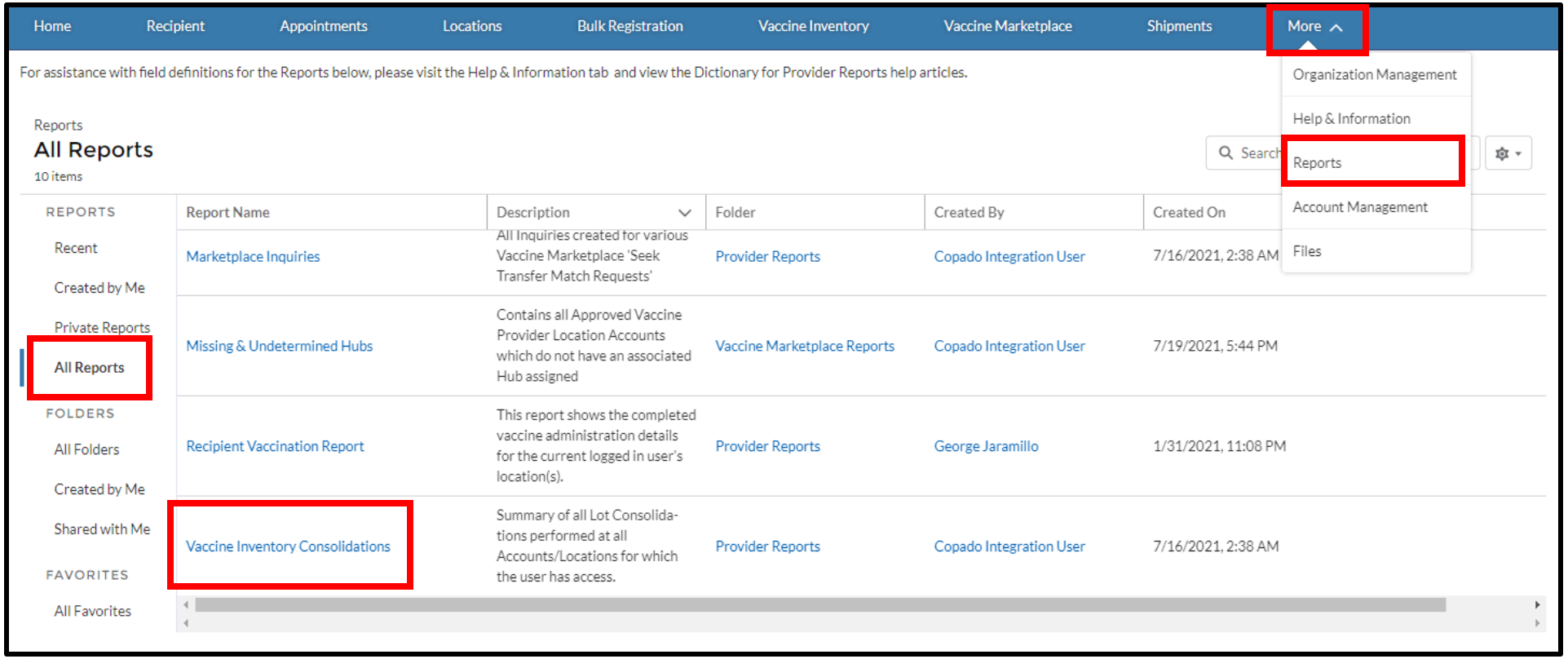
555

	Vaccine Inventory Name	NDC (Prod...	Account ...	Product Name	Lot	To...	D...	D...	Ex...	D...	Stat...	Expiration Date	Date Received	Created Date
1	Lot 555 Pfizer 6-dose Deliver...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6...	555	2,392	2,389	0		3	Availab...	12/31/2021, 12:00...	7/26/2021, 2:04 PM	7/26/2021, 2:05 P...
2	Lot 555 Pfizer 6-dose Deliver...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6...	555	1	0	0	0	0	Availab...	12/31/2021, 12:00...	7/26/2021, 2:05 PM	7/26/2021, 2:06 P...
3	Lot 555 Pfizer 6-dose Deliver...	59267-1000-02	TestLoc_UA...	Pfizer-BioNTech (6...	555	7	0	0	0	6	Availab...	12/31/2021, 12:00...	7/26/2021, 2:18 PM	7/26/2021, 2:19 P...

Access the Vaccine Inventory Consolidations Report

The Vaccine Inventory Consolidations report displays all lot consolidations performed at all locations for which the user has access.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **VACCINE INVENTORY CONSOLIDATIONS REPORT**



Audience

Healthcare Location Manager

Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal.

Access the Vaccine Inventory Consolidations Report (Continued)

This report will allow you to trace how many available doses were moved from an inventory record to another.

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

Report: Vaccine Inventories with Lot Consolidation Audit Logs

Vaccine Inventory Consolidations

Summary of all Lot Consolidations performed at all Accounts/Locations for which the user has access.

Add Chart | Export

Total Records	Total # Doses Consolidated (Actual)	Total Consolidate All Available Dos...
3	1,802	3

	Lot Consolidation Audit Log: Lot Consolidation Audit Log Name	# Doses Consolidated (Actual)	Lot	Vaccine Inventory Name	Vaccine Inventory (To/Increment)	Account Name	Lot Consolidation
1	LOTCONS-0003	10	10	Delivery 07/23/2021	RegressionTestInvTC01	TestLoc_UAT1	
2	LOTCONS-0005	599	555	Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 2	Lot 555 Pfizer 6-dose Delivery 07/26/2021	TestLoc_UAT1	
3	LOTCONS-0006	1,193	555	Lot 555 Pfizer 6-dose Delivery 07/26/2021 - 3	Lot 555 Pfizer 6-dose Delivery 07/26/2021	TestLoc_UAT1	
4		1,802					

Audience

Healthcare Location Manager

Receive State Sponsored Contract Inventories

Receiving State Sponsored Contract Inventories

A **state sponsored contract inventory** is an inventory specifically earmarked for state sponsored vendor events. The intent of tagging a vaccine inventory as a State Sponsored Contract is to allow it to be used for traditionally marginalized and underserved communities, which primarily will allow it to be used for recipients that need to be vaccinated in their homes. For most vaccine inventory records in CVMS, the State Sponsored Contract checkbox will be unchecked. If the state designates an inventory as a State Sponsored Contract, the following procedures should be followed.

If the option to mark the inventory is not available, please contact the NC Vaccines Help Desk (see slide 2 of this user guide for contact instructions).

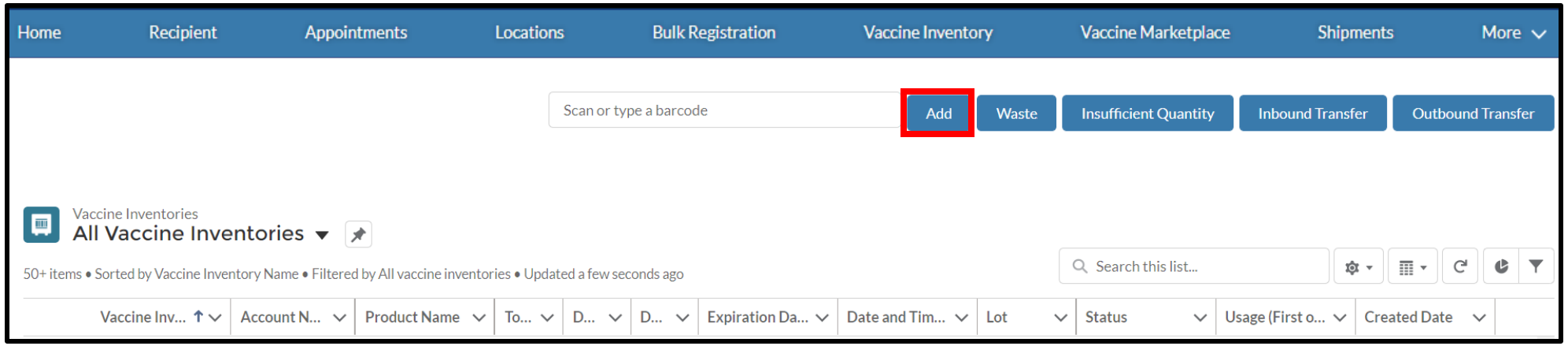
Audience

Healthcare Location Manager

Step 1 of 2: Navigate to the Vaccine Inventory Tab

To declare a new Vaccine Inventory record as a **State Sponsored Contract**:

1. Click **ADD** from the Vaccine Inventory Tab



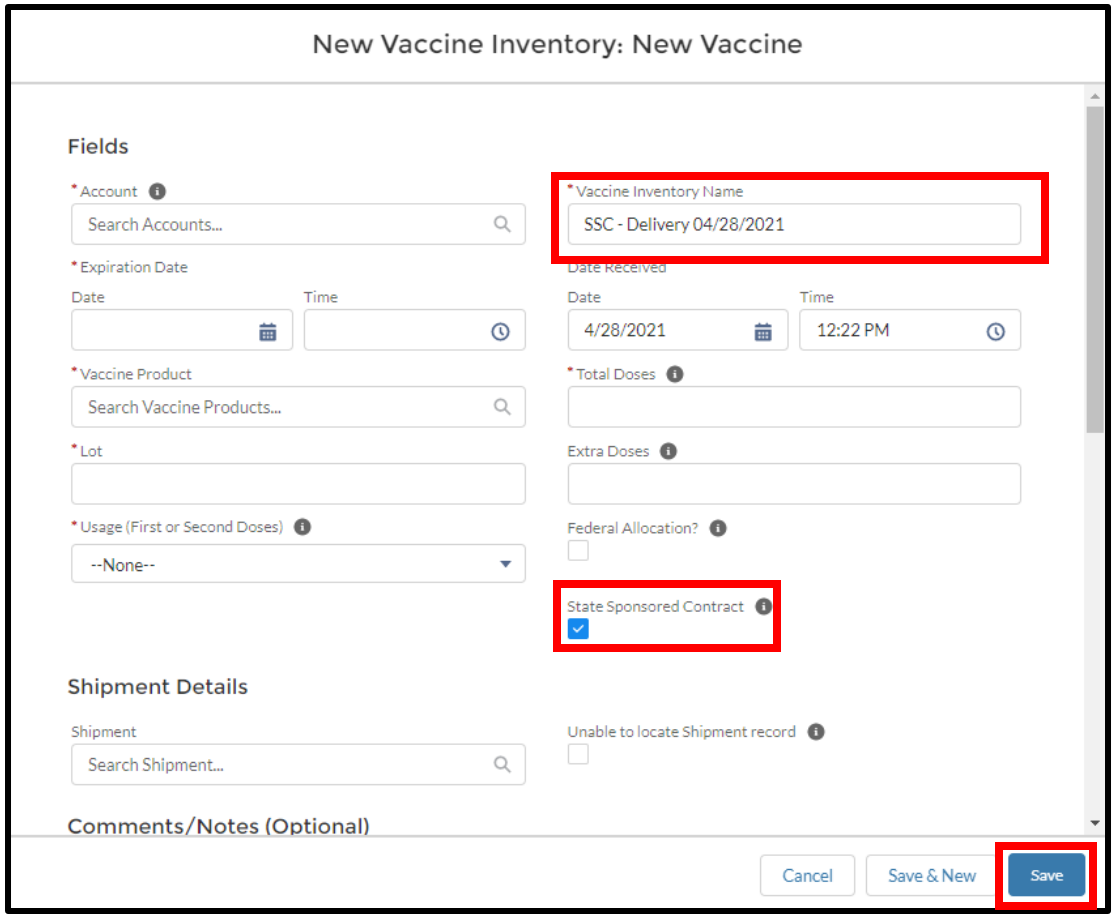
Audience

Healthcare Location Manager

Step 2 of 2: Complete New Vaccine Inventory Record Form

1. Populate all required **VACCINE INVENTORY FIELDS**
2. Add the label **SSC -** to the beginning of the *Vaccine Inventory name* so that it is easily identifiable.

   Note: This is a required labeling standard for ALL State Sponsored Contracts (e.g., "SSC – Delivery")
3. Check the **STATE SPONSORED CONTRACT** Checkbox
4. Click **SAVE**



Audience

Healthcare Location Manager

Tips

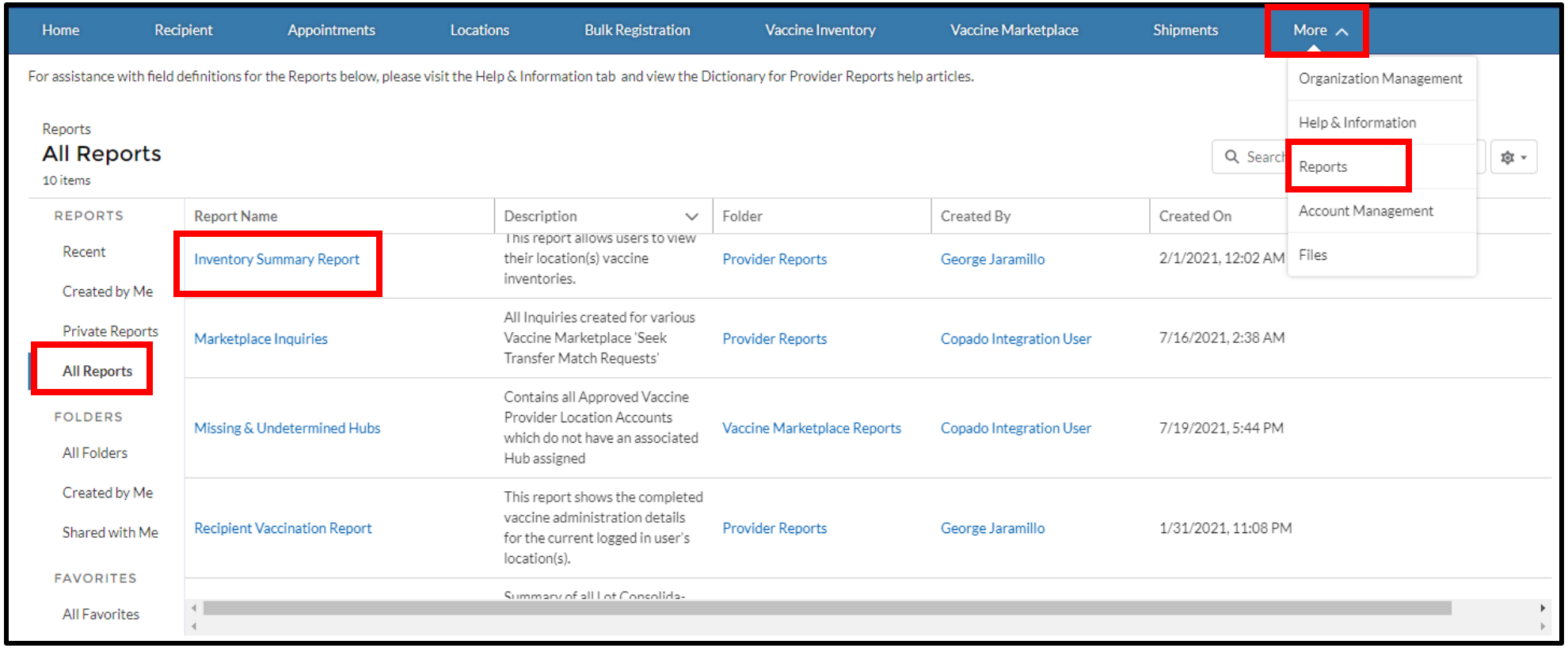
Remember that it is a best practice to always add the LOT NUMBER to all vaccine inventory names.

Access the Inventory Summary Report

Accessing the Inventory Summary Report

The Inventory Summary Report is available for you to view the status of all vaccine inventories in CVMS for all locations for which you are assigned as a Healthcare Location Manager.

1. Navigate to the **MORE** tab and select **REPORTS**
2. On the left, select **ALL REPORTS**
3. Click on the **INVENTORY SUMMARY REPORT**



Audience

Healthcare Location Manager

Accessing the Inventory Summary Report (Continued)

NCDHHS
CVMS Provider Portal

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

Report: Vaccine Inventory with Order and Shipment fields
Inventory Summary Report
This report allows users to view their location(s) vaccine inventories.

Add Chart | Export

Total Records	Total Doses Available	Total Doses Administered	Total Doses Transferred	Total Doses Wasted	Total Doses Insufficient Quantity	Total Total Doses	Total Extra Doses
66	35,423	50	4,132	385	57	39,338	709

Account: Account Name	Vaccine Inventory Name	Lot	Product	NDC (Product)	Expiration Date	Date Received	Status	Doses Availabl
Solutions Loc1 (40)	Lot 432 Delivery 02/26/2021	Lot 432	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	2/26/2021, 10:20 AM	Available	
	FED Lot 999 Delivery 03/03/2021	Lot 999	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/3/2021, 10:24 AM	Available	
	# GFS Lot 456 - Delivery 02/19/2021	456	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	7/24/2021, 12:00 PM	2/19/2021, 4:59 PM	Available	
	Lot 123 - Delivery 02/19/2021	123	Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine	59267-1000-02	8/13/2021, 12:00 PM	2/19/2021, 4:57 PM	Available	
	FED Delivery 03/04/2021 Lot 4444	4444	Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine	59267-1000-02	3/31/2022, 12:00 PM	3/4/2021, 4:05 PM	Available	
	Delivery 03/09/2021	Mod123	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	9/30/2021, 12:00 PM	3/9/2021, 9:32 AM	Available	
	Delivery 03/09/2021	Lot UA 8975	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/9/2021, 12:00 PM	Available	
	Lot 555 Delivery 03/10/2021	Lot 555	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/10/2021, 10:21 AM	Available	
	Lot 5432 Delivery 03/11/2021 2nd	Lot 5432	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	7/31/2021, 12:00 PM	3/11/2021, 2:22 PM	Available	
	FED Delivery 03/05/2021	4444	Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine	59267-1000-02	12/31/2021, 12:00 PM	3/5/2021, 12:38 PM	Available	
	Lot 6666666 Delivery 03/08/2021	6666666	Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-19 Vaccine	59267-1000-02	10/7/2021, 12:00 PM	3/8/2021, 2:52 PM	Available	
	Lot 789 Delivery 03/04/2021	Lot 789	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/4/2021, 2:26 PM	Available	
	Delivery 03/01/2021	777	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	5/6/2021, 12:00 PM	3/1/2021, 1:54 PM	Available	

Row Counts | Detail Rows | Subtotals | Grand Total

Audience

Healthcare Location Manager

Tips

For more information, see the **ACCESSING REPORTS** section of the **NAVIGATE THE CVMS PROVIDER PORTAL USER GUIDE** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers#step-6---navigate-the-cvms-provider-portal.

Appendix

Key Terms

Vaccine Inventory Shipment details	Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC).
Extra Doses	Extra Doses are any additional doses that are administered beyond what the CDC considers standard doses per vial for the specific COVID-19 vaccine type.
Redistribution	Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.
Transfer	Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).
Spoilage	Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.
Wastage	Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.
Insufficient Quantity	COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type is able to be administered to recipients.

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 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 some older versions of Edge browsers are not supported.

User Guide Change Log

Version	Date of Change	Changes Made	Author
1	12/21/2020	• Initial document	Azalea Troche
2	1/10/2021	• Updated shipment email notification • New slides on List Views and Account (Location) Record • Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Hep Desk Portal information • Tips on adding inventories	Courtney Seward
3	1/13/2021	• Added a new screenshot of the new redistribution/transfer form and took out the TIP in slide 21. The CVMS Help Desk Portal screenshot was also added.	Courtney Seward
4	1/17/2021	• Updated navigation bar. • Updated the terms for Redistribution and Transfer	Azalea Troche & Courtney Seward
5	1/21/2021	• Added a tip • Extra Doses • Complete Vaccine Inventory	Courtney Seward & Linda Wade
6	1/27/2021	• Updated Navigation Bar screen shots to show reports tab	Kristin Clark
7	2/4/2021	• Updated CVMS Help Desk Portal Screenshot • Updated Declare Vaccine Allocation Availability Section	Courtney Seward
8	2/15/2021	• Updated Vaccine Allocation Availability section • Added Insufficient Quantity Definitions • Added Insufficient Quantity Section • Updated screenshots to match new branding	Tabitha McKelvy Steve DiGangi Nicholas Rinz
9	3/2/2021	• Updated wording for Jansen Vaccine • Added federal allocation slide	Nicholas M. Rinz
10	3/10/2021	• Updated screenshots • Federal Allocation for non-FQHC or FEMA sites • Update Change Allocation Status tips and default status	Nicholas M. Rinz

User Guide Change Log (continued)

Version	Date of Change	Changes Made	Author
11	04/26/2021	• Updated screenshot to include “Location” menu • Added tip to do separate transfers for 1st and 2nd doses; 2nd dose should follow in approximately 3 weeks • Updated Step 7 to include 1st or 2nd dose to reason; updated screenshot to show example • Added continuation slide for Change Log • New HCP Roles Report screenshot	Darrell Lee
12	05/14/2021	• Removed references to 1st and 2nd dose tagging • Updated screenshots and addition of SSC • Remove reference to Usage (1st/2nd dose)	Darrell Lee
13	06/11/2021	• Added Vaccine Marketplace to overview • Updated screenshots to include Vaccine Marketplace tab • Added Vaccine Marketplace Instructions • Note added for Pfizer 6-dose not being eligible for extra doses	Darrell Lee
14	07/01/2021	• Introduced Hubs • Added a step about contacting the Hub • Added auto-update of available inventories • Added Additional steps to check listings posted by the assigned hub • Updated screenshots • Added Finding Associated Hub • Added the 3 rules that will make a listing auto-lapse • Updated new wastage drop-down and added tip	Darrell Lee
15	07/15/2021	• Updated Hubs • Added step for viewing inquiries • Added step for Inactivation Reason • Added step for Creating an Inquiry • Added step for Inactivation Reason • Added Edit Deprecation Event section	Darrell Lee

User Guide Change Log (continued)

Version	Date of Change	Changes Made	Author
16	07/26/2021	• Merged 2 user guides in this new format • Consolidate Available Doses from Multiple Vaccine Inventory Records in a Single Inventory	Vanessa Kemajou Darrell Lee
17	08/25/2021	• Updated screenshot to eliminate Federal Allocation • New tips added to address searching by hubs first • New guidance for entering locations in CVMS but not associated with same account • New guidance for adherence to Expiration Date Communication • Removed Federal Allocation section	Darrell Lee
18	09/15/2021	• Help desk hours updated	Kaitlin Gates
19	10/20/2021	• Removed "Offer your Vaccine Surplus" section • Added section on how to close a listing in the marketplace	Niya Nelson Darrell Lee
20	11/18/2021	• 30-74: Section reorganized to support a flow of “I need extra vaccine – what do I do?” to “I have extra vaccine – what do I do?” (Content remained the same but sequence changed) • 31: Content updated to remove reference to “Wanted” ads • 40: Updated Title Slide - Search for an Existing Ad and Create an Inquiry • 54-57: Added Section - Receive an Inquiry • 66: New Slide - Closing Active Inquiries for Vaccines that are No Longer Available	Niya Nelson Darrell Lee
21	12/17/2021	• 25, 35, 41: Updated screenshots with “Select Location”	Darrell Lee