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

Receive and Manage Vaccine Inventories User Guide

Version 22
May 1, 2022
On the home page of the NC Vaccines Help Desk Portal, select Login at the top right-hand corner, then select the "Vaccine Provider" option to submit your question, issue, or request.

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

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

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

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

The NC Vaccines Help Desk is available during the following hours:
- Monday to Friday: 7 am – 7 pm ET
- Saturday: 8 am – 4 pm ET
- Sunday: Closed

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

Now, let’s get started!
Receiving Vaccines
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.

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.

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 inventory 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

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.
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
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**
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**

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.

Audience

Healthcare Location Manager
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
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**
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 DEPRECIATION, 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**

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

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**

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

**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.

**Audience**

- Healthcare
- Location
- Manager
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.
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

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.

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.
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.

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**

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**
Step 3 of 5: Open Your Record

1. Click on your name to open the record
Step 4 of 5: Select Each Account from the Related Tab

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

Tips

Once you select Yes or No for a location, this selection will remain until you change it.
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
- When a suitable provider is identified, contact is made via either directly or via a Marketplace inquiry

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.
Search for Existing Ads and Create an Inquiry
If you need additional COVID-19 vaccine doses, check in the Vaccine Marketplace to view surplus inventory available from other providers.

1. At the top of your home page, click on the **VACCINE MARKETPLACE**
Step 2 of 7: Sort Inventories by Location

Find available inventory 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

**Tips**

You are not restricted to searching only without your geographic area. However, bear in mind that it is the responsibility of the providers involved to facilitate the transfer. Coordinating with providers that are too far away may not be feasible.
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
Step 4 of 7: Review the Listing

Review the listing to see if it matches your needs.
Step 5 of 7: 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

Tips

It is possible to contact the listed HCP contact directly with the information provided on the Seek Transfer Match listing.
Step 6 of 7: 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

Tips
Use the ADDITIONAL DETAILS section to fully describe your needs.
Step 7 of 7: Review the Inquiry

Review your inquiry. If any changes are needed, the inquiry can be edited by clicking EDIT in the upper right-hand corner.

Tips
If you see a Transfer Warning, disregard it.
Offer your Vaccine Surplus
Step 1 of 4: Initiate a New Seek Transfer Match

Post surplus inventory available for other providers in the Vaccine Marketplace.

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

Audience

Healthcare Location Manager

Tips

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”
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

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

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

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 email is the result of a provider inquiry in CVMS.
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
Step 2 of 2: View the Inquiry in CVMS

1. 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.
2. 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 associated with the inquiry
Step 2 of 3: Navigate to the Related Tab

1. Navigate to RELATED tab
2. Open the applicable inquiry
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.
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
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**
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
Close a 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
Step 2 of 2: Set Inactivation Reason

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
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=98M76m3#. 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
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

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)

**Audience**
- Healthcare
- Location Manager

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#### Report: Marketplace Inquiries

**Marketplace Inquiries**

<table>
<thead>
<tr>
<th>Total Records</th>
<th>Total Doses Requested</th>
<th>Total Transfer Warning</th>
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<td>20</td>
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#### Marketplace Inquiry Details

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<th>Requesting Account</th>
<th>Order (Marketplace Request)</th>
<th>MarketPlace Inquiry: MarketPlace Inquiry Name</th>
<th>Status</th>
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**Source:** 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**
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

**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.

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.
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

**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**

**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 Branch.

![Vaccine Inventory: Grace Pfizer Inventory](image)
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...**

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) COVID-19 Vaccine

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

Thank you, NC Department of Health and Human Services

Division of Public Health
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.
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

Tips
Review the Vaccine Receiver to confirm it is the correct 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
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**.
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**
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
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

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

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**
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**

Tips

Complete the inbound transfer form by clicking Finish.

Audience

Healthcare Location Manager
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
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**

**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

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

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.

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.
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

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

**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

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

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.

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

**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

---

**Audience**

- Healthcare
- Location Manager

---

**Website Screenshot:**

- **Page Title:** Vaccine Inventories
- **Search Bar:** Search this list...
- **Table:**
  - Columns: NDC, Product Name, Lot, Expiry, Status, Created Date
  - Rows:
    - Lot: 59267-1000-02, Product Name: Pfizer-BioNTech
    - Lot: 80777-0273-99, Product Name: Moderna
    - Lot: 59267-1000-02, Product Name: Pfizer-BioNTech
    - Lot: 80777-0273-99, Product Name: Moderna
  - Highlighted Row: Lot: 59267-1000-02, Product Name: Pfizer-BioNTech
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

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<td><strong>Entire vaccine inventory wasted</strong></td>
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<tr>
<td><strong>Vaccine Inventory</strong></td>
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<tr>
<td><strong>Account (Location) Name</strong></td>
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<td><strong>Doses Wasted</strong></td>
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<td><strong>Reason for Waste</strong></td>
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</table>

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
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
Step 3 of 3: Update the Vaccine Inventory Record

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

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.

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
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.*
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
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
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.
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.
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.

**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
Step 2 of 4: Open the Consolidate Available Doses Feature

1. Click on **CONSOLIDATE AVAILABLE DOSES**
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”.

![Image of Vaccine Inventory System]
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

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.

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<th># Doses Consolidated (Actual)</th>
<th>Lot</th>
<th>Vaccine Inventory Name</th>
<th>Vaccine Inventory (Do/IncrementID)</th>
<th>Account Name</th>
<th>Lot Consolidation</th>
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<tr>
<td>LTCCONS-0003</td>
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<td>Delivery 07/23/2021</td>
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<td>Test/LID1</td>
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<td>LTCCONS-0015</td>
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<td>599</td>
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<td>LTCCONS-0007</td>
<td>1,802</td>
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</tbody>
</table>

**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).
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
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**

**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
Accessing the Inventory Summary Report (Continued)

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
<table>
<thead>
<tr>
<th>Key Terms</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccine Inventory Shipement Details</td>
<td>Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC).</td>
</tr>
<tr>
<td>Extra Doses</td>
<td>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.</td>
</tr>
<tr>
<td>Redistribution</td>
<td>Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.</td>
</tr>
<tr>
<td>Transfer</td>
<td>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).</td>
</tr>
<tr>
<td>Spoilage</td>
<td>Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.</td>
</tr>
<tr>
<td>Wastage</td>
<td>Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.</td>
</tr>
<tr>
<td>Insufficient Quantity</td>
<td>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.</td>
</tr>
</tbody>
</table>
Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- **Asterisks** are used to denote required information.
- **A Toggle** can be clicked to see selectable options.
- **A Pen** can be clicked to make edits to the field.
- **Navigation Buttons** can be clicked on to progress to the “next” or the “previous” step in a task.
- **A Pause button** can be clicked if you wish to step away and return to your form later. You will be prompted to review your previously entered data upon your return/login.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge browsers to access CVMS.
- For more information on supported browsers, see [https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)
- Note: Internet Explorer and some older versions of Edge browsers are not supported.
## User Guide Change Log

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

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<thead>
<tr>
<th>Version</th>
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<th>Author</th>
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</table>
| 11      | 04/26/2021     | • Updated screenshot to include “Location” menu  
• Added tip to do separate transfers for 1<sup>st</sup> and 2<sup>nd</sup> doses; 2<sup>nd</sup> dose should follow in approximately 3 weeks  
• Updated Step 7 to include 1<sup>st</sup> or 2<sup>nd</sup> 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 1<sup>st</sup> and 2<sup>nd</sup> 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 |
<table>
<thead>
<tr>
<th>Version</th>
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<th>Author</th>
</tr>
</thead>
</table>
| 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                 |
| 22      | 05/01/2022     | • 3, 4 – Table of Contents Updated  
• 31, 32 – Reference to contacting hub for assistance removed  
• Find Associated Hub section - removed  
• Search Existing Ads section - Step 2 of 8, searching by hub, deleted and steps reduced to 7  
• 34-35 - Reference to hubs removed  
• 35 – Tip added  
• 40 – Reference to hubs removed; Tip added  
• 42 – Intro text updated to remove allusion to legacy “Wanted” listings; Tip reference to hubs removed  
• 63 – Tip reference to hub removed                                                                                                                                 | Darrell Lee                 |