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

Allow Recipients to Self-Schedule their Appointments (Optional)

User Guide

Version 12
December 17, 2021
On the home page of the NC Vaccines Help Desk Portal, select Login at the top right-hand corner, then select the "Vaccine Provider" option to submit your question, issue, or request.

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

1. Register for an account by clicking 'Login' then 'Register' on the left side of the screen
2. Populate your first name, last name, business e-mail, and registration code

Note: If you do not know your organization’s registration code (ORG-ID), please contact the help desk
3. You will receive an e-mail with your username and temporary password to log into the portal

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

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

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

* On the home page of the NC Vaccines Help Desk Portal, select Login at the top right-hand corner, then select the "Vaccine Provider" option to submit your question, issue, or request.
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Overview
The scheduling feature in CVMS is optional and free to use for providers. It will allow your location(s) to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment for a COVID-19 vaccine and complete their registration in CVMS before their 1st dose appointment. You will then be able to schedule their 2nd dose appointment the day of their 1st dose appointment. And later, recipients will be able to self-schedule an additional dose/booster appointment.

Note that these appointments slots will be made available to the general public. Therefore, this feature will NOT fit your needs if you vaccinate only a selected group of recipients (e.g., long-term care facility residents, prisoners).

In this user guide, we will review how to activate and use the scheduling feature in CVMS. You will be able to:

- Activate the scheduling feature in CVMS
- Publish appointments on the Vaccine Site Locator website [https://vaccines.gov](https://vaccines.gov)

The processes included in this user guide are for users with the **Healthcare Location Manager profile only**.

Additionally, you will need to:

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

Now, let’s get started!
Once enabled, you can set up the scheduling feature for your location(s) in the CVMS Provider Portal and allow recipients to self-schedule their first-dose and additional dose/booster appointments.

Enable scheduling for your account in the CVMS Provider Portal.

Once enabled, you can set up the scheduling feature for your location(s) in the CVMS Provider Portal and allow recipients to self-schedule their first-dose and additional dose/booster appointments.

Set your weekly availability for recipients to book appointments.

Update the number of first-dose or additional dose/booster appointments made available to recipients as needed.
# Appointment Self-Scheduling Feature Key Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
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<tbody>
<tr>
<td>Appointments Per Time Window</td>
<td>The number of concurrent appointments this location can complete per stated time window duration. Keep in mind the number of clinicians available at the time.</td>
</tr>
<tr>
<td>Start Date</td>
<td>First day the location will show available appointment slots.</td>
</tr>
<tr>
<td>Closing Date</td>
<td>Last day the location will show available appointment slots on the Vaccine Site Locator website.</td>
</tr>
<tr>
<td>Vaccine Supply</td>
<td>The Vaccine (Appointment) Supply record is the number of appointments that are made available.</td>
</tr>
<tr>
<td>Current Stock</td>
<td>The total number of appointments your location will offer to recipients. This should match the number of doses to cover all existing and future appointments. If no stock remains, location won’t display available slots.</td>
</tr>
<tr>
<td>Date of Stock Count</td>
<td>Date of creation of the Vaccine Supply Record. Once created, <strong>do not edit this date.</strong></td>
</tr>
<tr>
<td>Dose Number</td>
<td>Indicates whether the dose administered is the 1\text{st} dose, 2\text{nd} dose, or an additional dose/booster.</td>
</tr>
</tbody>
</table>
Initial Setup of the Scheduling Feature in CVMS
Enable the Scheduling Feature
Step 1 of 5: Navigate to the Locations Tab

Providers can opt-in to using the scheduling feature in CVMS.

1. Click on the **LOCATIONS** tab

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Healthcare Location Manager
Step 2 of 5: Begin to Enable Scheduling

1. Click the **ENABLE SCHEDULING** button
Step 3 of 5: Select Provider Account

The scheduling feature in CVMS can be enabled for each provider location account. Once your account has been enabled, all vaccination site locations associated with that provider location can begin using the scheduling feature in CVMS.

1. Select the provider(s) for which you want to enable the scheduling feature in CVMS
2. Click NEXT
Step 4 of 5: Review Questions

Read and review the statements. You must agree to all statements before you can enable the scheduling feature in CVMS for your location.

1. Check the checkbox attesting that you understand each statement
2. Click SAVE
Step 5 of 5: Navigate to the Locations Tab

Congratulations! Your selected location is now enabled to use the scheduling feature in CVMS!
Activate Scheduling for Each of Your Vaccination Site Location
Step 1 of 4: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab

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Step 2 of 4: Select the Location

1. Click on the LOCATION NAME for which you wish to enable the scheduling feature in CVMS

Tips
You can choose to enable the scheduling feature in CVMS for some or all your vaccination site locations.
Step 3 of 4: Edit your Location Record

Navigating to the Details tab allows you to view and edit location details.

1. Click **EDIT**

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Tips

Locations will be displayed on the Vaccine Site Locator website [https://vaccines.gov](https://vaccines.gov) if the Display on Vaccine Site Locator field is set to **YES** and if the Location Setting field is set to **DEFAULT**.
Step 4 of 4: Activate the Scheduling Feature of CVMS for your Location

1. Check the **CVMS SCHEDULING** box
2. Select the date range to use the scheduling feature
3. Click **Save**

**Tips**
Both **CVMS Scheduling** and **Display on Vaccine Site Locator** should be checked to allow recipients to find your site and book appointments.
Publish Appointment Slots Using the Scheduling Feature in CVMS
Set Maximum Number of Appointments
Setting Vaccine Supply

“Vaccine (Appointment) Supply” is what sets the total number of first dose, second dose or additional dose/booster appointments available

- Set 1st dose and additional dose/booster Vaccine Supplies to equal the number of appointments you want to make available for that location
- We recommend to set the dose 2 Vaccine supply to a very large number as 2nd dose appointments are booked by the providers directly, so there is no need to limit that number
- It does NOT need to be the same as your total inventory on hand.
  → If you need to hold back doses (e.g., set aside for a planned event, Historically Marginalized Population outreach), do not include those in the “Vaccine Supply”
- You should only release the number of First-Dose and Additional Dose/Booster appointments that you know your location can handle, and add to this number frequently as you reach the maximum number set
Step 1 of 7: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. The same weekly schedule will be used to book 1\textsuperscript{st}, 2\textsuperscript{nd}, and any additional dose/booster appointments if applicable. To begin, you must navigate to the location.

1. Click on the LOCATION TAB
2. Click on the LOCATION NAME hyperlink
Step 2 of 7: Edit your 1\textsuperscript{st} Dose Vaccine Supply Record

1. Click on RELATED
2. Click on the down arrow for the DOSE NUMBER 1 VACCINE SUPPLY RECORD
3. Click EDIT
Step 3 of 7: Add New Appointments to the Number of 1st Dose Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new 1st dose appointments to be offered. Note: Each appointment scheduled by a recipient will reduce the remaining number of appointments. Therefore, add to the current stock to allow for additional appointments. For example, if you wish to allow 100 additional appointments and the current stock is set at 900, update the Current Stock field to show 1,000.

2. Click **SAVE**

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**Tips**

There is no correlation between Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments.

You should **only increase this current stock and never reduce it**, as it represents the maximum number of appointments released since you began using the feature. If your current stock is less than number of appointments booked, then people will not see any availability at your location for a dose 1 appointment.
Step 4 of 7: Edit your 2nd Dose Vaccine Supply Records

1. Click on RELATED
2. Click on the down arrow for the DOSE NUMBER 2 VACCINE SUPPLY RECORD
3. Click EDIT
Step 5 of 7: Add New Appointments to the Number of 2\textsuperscript{nd} Dose Appointments Offered

1. Increase the \textbf{CURRENT STOCK} amount to allow new 2\textsuperscript{nd} dose appointments to be offered.

   \textit{Note: When recipients have received for their first-dose appointment, only, you, the vaccine providers, will be able to schedule their second-dose appointment (if applicable). Therefore, the risk of overbooking is extremely low. We recommend that you make the Current Stock large, so you do not need to maintain the number of second and additional dose/booster appointments to be released in the system.}

2. Click \textbf{SAVE}
Step 6 of 7: Edit your Additional Dose/Booster Vaccine Supply Record

1. Click on RELATED
2. Click on the down arrow for the ADDITIONAL DOSE/BOOSTER NUMBER VACCINE SUPPLY RECORD
3. Click EDIT
Step 7 of 7: Add New Appointments to the Number of Additional Dose/Booster Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new additional dose/booster appointments to be offered

   For example, if you wish to allow 100 additional dose/booster appointments and the current stock is set at 900, update the Current Stock field to show 1,000.

2. Click **SAVE**

---

**Tips**

Like the Dose 1 Vaccine Supply record, you should **only increase this current stock and never reduce it**, as it represents the maximum number of appointments released since you began using the scheduling feature in CVMS. If your current stock is less than the number of appointments booked, then people will not see any availability at your location for an additional dose/booster appointments.
Set Weekly Location Schedule for Dose 1, Dose 2, and Additional Dose/Booster Appointments
Step 1 of 8: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. The same weekly schedule will be used to book 1\textsuperscript{st}, 2\textsuperscript{nd}, and additional dose/booster appointments if applicable. To begin, you must navigate to the location.

1. Click on the LOCATION TAB
2. Click on the LOCATION NAME hyperlink
Step 2 of 8: Set the Dates for which Recipients can Book an Appointment

First dose and additional dose/booster appointment slots will be available for recipients to book appointments between the **START DATE** and **CLOSING DATE** for a location.

1. Click on the **DETAILS** tab
2. Click Edit
3. Enter the location **START DATE**
4. Enter the location **CLOSING DATE**
5. Click **SAVE**

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**Tips**

You may regularly edit the **CLOSING DATE** to extend it as you receive more **VACCINE INVENTORY**.

Step 3 of 8: Open the Availability tab

The default vaccination schedule for a location is created and managed on the **AVAILABILITY TAB**.

1. Click on the **AVAILABILITY TAB**

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- Healthcare Location Manager

**Tips**
- All previously scheduled appointments will be unaffected by updates to the vaccination schedule.
Step 4 of 8: Select Opening Days

A location will set weekly time to administer vaccinations from its **START DATE** to its **CLOSING DATE** for dose 1, dose 2, and additional dose/booster appointments.

1. Check the checkbox for each day you will administer vaccinations at this location (Monday through Sunday)

**Tips**

Unselected days will not be open to appointments.
Step 5 of 8: Set Opening Hours

For each open day you will need to set the OPENING HOURS per time window. You can have multiple time windows within the same day. To add another time window, click on the ACTIONS on the right and select ADD TIME.

1. Enter the OPENING HOURS

Tips
Do not check the ALL DAY checkbox as this will allow appointments to be scheduled over a 24-hour period.
You may not enter a time twice on the same day (e.g., a time window on Monday from 8 AM to 6 PM and another time window on Monday from 8 AM to 11 AM).
Step 6 of 8: Enter Time Window Duration

The **TIME WINDOW DURATION (MIN)** is the length of time it takes for a single vaccinator to administer a vaccination (typically 5 to 15 minutes). Appointments will be created at evenly spaced intervals throughout the **OPENING HOURS** at the location. If the **OPENING HOURS** require a unique **TIME WINDOW DURATION**, you must add another opening hours.

1. Enter the **TIME WINDOW DURATION (MIN)** applicable for the entire schedule at this location.

![Image of the time window duration interface](image-url)
Step 7 of 8: Enter Appointments Per Time Window

Appointments per time window is the number of people you can vaccinate at the same time. If the OPENING HOURS require a unique APPOINTMENTS PER TIME WINDOW, you must add another opening hours.

1. Enter the APPOINTMENTS PER TIME WINDOW

Note: The number of appointments will automatically display based on the information entered.

---

### Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

<table>
<thead>
<tr>
<th>Day</th>
<th>Opening hours</th>
<th>Time window duration (mins)</th>
<th>Appointments per time window</th>
<th>Total appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>MON</td>
<td>08:00 A... 12:00 P... All day</td>
<td>15</td>
<td>2</td>
<td>32</td>
</tr>
<tr>
<td></td>
<td>12:45 P... 05:00 P...</td>
<td>15</td>
<td>2</td>
<td>34</td>
</tr>
<tr>
<td>TUE</td>
<td>Unavailable</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

Audience

Healthcare Location Manager
Step 8 of 8: Finalize Schedule

You have now created a default schedule for your location.

1. **REVIEW** the schedule for the location
2. Click **SAVE**

*Congratulations! You have now finalized the default schedule for your location!*

**Tips**
The schedule determines the number of appointment slots. For an appointment to be made, there must be an open appointment slot and available vaccine (appointment) supply.
Create Non-Regular Availability (Availability Override)
Step 1 of 4: Navigate to the Location

Set a non-regular availability schedule to create a schedule when your location does not follow the default schedule availability in the case of holiday closure, reduced hours, large vaccination event, or more.

1. Click on the **LOCATION TAB**
2. Click on the **LOCATION NAME** hyperlink

![Image of Location Menu](image-url)
Step 2 of 4: Open the Availability tab

Non-regular availability is set on the Availability tab. The default schedule is at the top. If the location does not follow this schedule, create an **AVAILABILITY OVERRIDE**.

1. Click on the **AVAILABILITY TAB**
2. Scroll-down to the bottom of the page, and click the **NEW AVAILABILITY OVERRIDE** button

**Tips**
A location can have up to 10 **AVAILABILITY OVERRIDES**.
Step 3 of 4: Set Override Dates

The Availability Override schedule will override the default schedule availability between the dates that you set.

1. Set the beginning of the Availability Override in the **FROM** field
2. Set the end of the Availability Override in the **UP TO AND INCLUDING** field

![Availability override settings](image)

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Healthcare Location Manager

**Tips**
For a single day closure, select the same date in the two date fields FROM and UP TO AND INCLUDING.

If the override does not currently have an end date, select the No end date, run ongoing checkbox.
Step 4 of 4: Set Availability Schedule for Override Dates

Create the override availability schedule for the location. See the *Set Weekly Location Schedule for Dose 1, Dose 2, and Additional Dose/Booster Appointments* section for more information on creating an availability schedule. Note, this schedule will only apply to the location between the availability override dates.

1. Set your override availability schedule
2. Click **SAVE**
Review Number of Appointments Booked and Remaining Quantity
Step 1 of 3: Navigate to Reports

Once you published your first schedule and received your first appointments, you will need to regularly update the number of 1st Dose and additional dose/booster appointments released in the system. A report is provided to you to aid you in releasing additional appointments.

1. Under the MORE tab, select REPORTS
Step 2 of 3: Open Vaccine Supply Report

The **DOSE 1 VACCINE SUPPLY REPORT** and **DOSE 2 VACCINE SUPPLY REPORT** are found in the All-Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

1. Click on the **ALL REPORTS** folder
2. Click on the **DOSE 1 VACCINE SUPPLY REPORT** or **DOSE 2 VACCINE SUPPLY REPORT**

**Tips**
You will not need to maintain the dose 2 Vaccine Supply records once created if you make the Current Stock very large.
Step 3 of 3: Review Vaccine Supply Report

The **VACCINE SUPPLY REPORTS** show you the Current Stock as the location, the number of appointments (jobs) for the relevant dose, and the number of additional appointments that can be booked (remaining quantity). If the **REMAINING QUANTITY** is larger than 0, recipients will be able to book an appointment at this location if there is an available appointment slot. If this number is 0 or less, you must increase the current the Current Stock so that the Remaining Quantity is larger than 0 before additional recipients can book appointments.

1. Review the **REMAINING QUANTITY** and determine how many additional appointments to release

2. Click on the location name hyperlink to edit as explained in the **SET MAXIMUM NUMBER OF APPOINTMENTS** section of this user guide

<table>
<thead>
<tr>
<th>Location Name</th>
<th>Sum of Current Stock (Dose 1 only)</th>
<th>f(x) Cumulative no. of jobs for Dose 1</th>
<th>f(x) Remaining quantity (Dose 1 only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kevin’s Pharmacy</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
Review Availability Report
Step 1 of 3: Navigate to Reports

If you wish to review your location’s schedule availability for the next 7 days, the **AVAILABILITY REPORT** will show you the number of appointment slots, booked appointments, and remaining appointments.

1. Click on the **REPORTS** tab
Step 2 of 3: Open Availability Report

The **AVAILABILITY REPORT** is found in the All-Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

1. Click on the **ALL REPORTS** folder
2. Click on the **AVAILABILITY REPORT**
Step 3 of 3: Review Schedule Availability for the Next 7 Days

The AVAILABILITY REPORT shows the number of appointment slots as defined by the location’s availability and the number of appointment slots booked for first and second-dose appointments.

- The availability schedule is shared by first and second-dose appointments.
- Lastly, review the remaining quantity of appointment slots.

You may find that you need to increase availability to allow additional appointments to be booked. See the Set Weekly Location Schedule for Dose 1, Dose 2, and Additional Dose/Booster Appointments section for more information on editing the default availability schedule. See the Create Non-Regular Availability section for more information on editing the availability schedule for temporarily editing the availability schedule.

Tips
The Availability Report is updated once daily.
Scheduling from the Perspective of a Recipient

Below are the various activities included in the appointment scheduling process from the perspective of a Recipient.

1. Recipient identifies vaccine location on the Vaccine Site Locator website (VACCINES.GOV)
2. Recipient clicks on check appointment availability
3. Recipient selects location on TakeMyShot
4. Recipient selects an appointment slot
5. Recipient enters personal details
6. Recipient receives confirmation number

Recipient appears in COVID-19 vaccine portal

Recipient and appointment appear in COVID-19 vaccine portal

Recipient can cancel appointment if needed
Appendix
Additional Notes

Key Items:

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

**Supported Web Browsers:**

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more 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 Edge (non-Chromium) 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>
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<tbody>
<tr>
<td>1</td>
<td>03/12/2021</td>
<td>• Initial document</td>
<td>Kevin Kauffman, Kechia Scott, Kristin Clark</td>
</tr>
<tr>
<td>2</td>
<td>03/25/2021</td>
<td>• Added tip about Display Vaccine Site Locator field</td>
<td>Kristin Clark</td>
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<tr>
<td>3</td>
<td>04/01/2021</td>
<td>• Replaced screen shots to reflect Vaccine Brand field</td>
<td>Kristin Clark</td>
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<tr>
<td>4</td>
<td>04/06/2021</td>
<td>• Updated Recipient Scheduling process</td>
<td>Tabitha McKelvy</td>
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<td>5</td>
<td>04/16/2021</td>
<td>• Added updated enable scheduling process</td>
<td>Kevin Kauffman</td>
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<td>• Updated Display on Vaccine Site Locator to dropdown</td>
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<td>• Added guidance for Location Setting field on location record</td>
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<td>• Updated guidance on non-regular closures</td>
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<td>6</td>
<td>05/14/2021</td>
<td>• Added non-regular schedule availability support</td>
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<td></td>
<td>• Included scheduling reports</td>
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<td>7</td>
<td>06/22/2021</td>
<td>• Updated Vaccine Site Locator to be the CDC website, Vaccines.gov</td>
<td>Kevin Kauffman</td>
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<tr>
<td></td>
<td></td>
<td>• Updated steps for new location creation vaccine supply to edit</td>
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<td>• Updated location record screenshots with new field order</td>
<td>Kevin Kauffman</td>
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<td>• Updated recipient appointment scheduling flow</td>
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<td>9</td>
<td>07/27/2021</td>
<td>• New user guide format</td>
<td>Vanessa Kemajou</td>
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<td>08/26/2021</td>
<td>• Help Desk References Updated</td>
<td>Kaitlin Gates</td>
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<td>11</td>
<td>09/20/2021</td>
<td>• Help Desk hours updated</td>
<td>Kaitlin Gates, Darrell Lee</td>
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<td></td>
<td></td>
<td>• Screenshots updated throughout to reflect current tool bar</td>
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<tr>
<td></td>
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<td>• All references to 2nd dose now also include additional dose/booster</td>
<td></td>
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<tr>
<td></td>
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<td>• 24-27: Updated to include references to additional dose/booster</td>
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<td>• 28-29: Added slides to discuss setting number of appointments for additional</td>
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<td></td>
<td></td>
<td>dose/booster</td>
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<tr>
<td></td>
<td></td>
<td>• 32: Now linked to Step 10 User Guide</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>• 46: Updated to include current reports</td>
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<td></td>
<td></td>
<td>• 47: Explained how to edit location if required</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>12/17/2021</td>
<td>• 2: renamed help desk</td>
<td>Niya Nelson</td>
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