NC COVID-19 RESPONSE: CVMS to NCIR Provider Transition

The roadmap serves as a guide on how an existing COVID-19 vaccine provider transitions from CVMS to NCIR to manage COVID-19 vaccinations in North Carolina.

For Existing CVMS COVID-19 Providers Transitioning to NCIR

Thank you for your continued commitment to ensuring the health and safety of North Carolinians!

This guide is for providers who intend to transition from using CVMS to using NCIR for managing COVID-19 vaccinations. Please note: *You should not attempt to report COVID-19 vaccine administrations in NCIR until you have received a final email communication stating that your site is ready to begin using NCIR for COVID-19 vaccine management.*

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

- Attend a live NCIR training, review NCIR training materials, and review the System Selection Considerations.
- Explore the Knowledge Base and review the COVID-19 Vaccine Provider Toolkit

North Carolina Immunization Registry (NCIR)

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

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

Key Roles

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

Your enrollment journey begins here...

1 Access Provider Enrollment Portal

Organization Administrator will log into the Provider Enrollment Portal and click on the link in the new COVID-19 System Submittal section taking them to the System Selection page.

Responsible: Organization Administrator

2 Select NCIR & Complete Agreement

Organizations choosing to begin managing COVID-19 vaccines in NCIR should select NCIR as their preferred system. Indicate agreement to the NCIR Agreement.

Responsible: Organization Administrator

3 Receive System Selection Confirmation

Upon submitting system selection of NCIR, all users associated with the Organization receive an automated confirmation email with next steps.

4 Complete First NCIR Administrator Survey

Vaccine Coordinator for each site will access the NCIR Administrator survey via the link provided in the confirmation email and indicate who will be the first NCIR Administrator user. This user will be responsible for providing/confirming access for all other users at their assigned site.

Responsible: Vaccine Coordinator

5 Add/Confirm First NCIR Administrator

DHHS IB Enrollment Team will add/confirm first NCIR Administrator for each site.

Responsible: DHHS IB Enrollment Team

6 Receive Welcome Email With Next Steps

NCIR Administrator receives welcome email with next steps and instructions for adding additional users and clinicians.

7 Add/Confirm Additional Users

NCIR Administrator will be responsible for adding the organization's NCIR users and clinicians. Users will provide their NCID username to the NCIR Administrator to add them to the system.

Responsible: NCIR Administrator

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

STOP Your NCIR transition is NOT complete! DO NOT begin reporting COVID-19 vaccine administrations in NCIR until indicated in the final transition complete email. Transition times vary based on the Organization's circumstances. Timelines are provided in the NCIR Administrator welcome email.

8 Receive Transition Complete Email

All users associated with the Organization receive an automated NCIR setup completion email the day before all sites can begin managing COVID-19 vaccine in NCIR.

9 Deactivate CVMS User Accounts & Transfer Inventory

DHHS IB Enrollment Team will deactivate CVMS Provider Portal access for all users associated with the Organization and transfer remaining COVID-19 vaccine inventory from CVMS to NCIR.

Responsible: DHHS IB Enrollment Team

10 Receive and Manage Vaccine Inventories

NCIR users designated with Inventory Control will have access to view and manage COVID-19 vaccine inventories, orders, and transfers, as well as to record wastage.

Responsible: Inventory Control User, NCIR Administrator

11 Add New Clients

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

Responsible: Typical Users, Inventory Control User, NCIR Administrator

12 Document Vaccinations

During the vaccination appointment, vaccinators (or designated person) will record the client's COVID-19 vaccination in NCIR.

Responsible: Typical Users, Inventory Control User, NCIR Administrator

Key: NCIR Enrollment/Onboarding · System Transition Steps · NCIR Vaccine Management

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

Step-by-Step Instructions for NCIR Enrollment

STEP 1: Access Provider Enrollment Portal

Identified points of contact within an Organization receive communication from NCDHHS indicating that the Organization Administrator should log in to the CVMS Provider Enrollment Portal and make a system selection for managing COVID-19 vaccines.

When the Organization Administrator logs into the Provider Enrollment Portal, they will see a new **COVID-19 System Submittal** section. The selected system should say NONE upon first log in. They will click on the link taking them to the System Selection page.

STEP 2: Select NCIR and Complete Agreement

Organization Administrators will review the system selection information and use the "Selected COVID-19 Vaccine Documentation System" drop-down to select NCIR. The NCIR Agreement will then be presented. It must be reviewed and agreed to by checking the box before clicking Next.

The system selection is made at the CVMS Provider Enrollment level, therefore, all locations/sites beneath an enrolled organization will be transitioned as well. NCIR set up must be completed for ALL organizations/locations/sites associated with a single organization entity before any of them can begin managing COVID-19 vaccine in NCIR.

At this time, the system selection can only be made one time with the CVMS Provider Enrollment Portal.

HELPFUL LINKS: System Selection Information

STEP 3: Receive System Selection Confirmation

An automated "Transition from CVMS to NCIR" email will be sent to all users associated with the Organization confirming the system selection and providing the next steps in the transition process.

This notification will declare the location's system selection for administering COVID-19 Vaccines and what that means as well as next steps, informing to keep inventory and wastage up to date by the end of each day, and providing preliminary training materials.

System Transition Steps

Transition times vary based on an Organization's individual circumstances. The expected transition timelines are as follows:

- For new COVID-19 vaccine providers who will be using the NCIR user interface (UI) to report COVID-19 vaccination administration directly into NCIR, please allow up to five business days from the enrollment approval date for your NCIR system set-up to be completed.
- For new COVID-19 vaccine providers who will be reporting and querying COVID-19 vaccination administration through an EHR to NCIR integration, please allow up to five business days after all sites have established connectivity for your NCIR system set-up to be completed.
- For existing COVID-19 vaccine providers using the NCIR user interface (UI) to report COVID-19 vaccination administration directly into NCIR, please allow up to ten business days from the system selection date for your NCIR system set-up to be completed.
- For existing COVID-19 vaccine providers reporting and querying COVID-19 vaccination administration through an EHR to NCIR integration, please allow up to ten business days after all sites have established connectivity for your NCIR system set-up to be completed.

STEP 4: Complete First NCIR Administrator Survey

The first NCIR Administrator user will need to be identified for each site. This person will be responsible for managing access for all other users and clinicians at that site.

Even if the identified user already has access to NCIR and are already an NCIR Administrator, that person will still need to be identified in order for the DHHS IB Enrollment Team to begin the transition. At a minimum, the DHHS IB Enrollment Team will ensure the identified user has access and the appropriate role assigned.

To identify the site's first NCIR Administrator user, the Vaccine Coordinator for each site will complete the NCIR Administrator Selection survey with the site's VFC PIN, the user's name, NCID, and email address.

STEP 5: Add/Confirm First NCIR Administrator

The DHHS IB Enrollment Team will add or confirm the first NCIR Administrator in NCIR.

If the Vaccine Coordinator did not complete the NCIR Administrator Selection survey by the time the DHHS IB Enrollment Team is ready to begin the transition activities, a member of the team will reach out to the Vaccine Coordinator to obtain the information.

Step-by-Step Instructions for NCIR Enrollment

STEP 6: Receive Welcome Email With Next Steps

The first NCIR Administrator added for the site by the DHHS IB Enrollment Team will receive a welcome email with next steps and instructions for adding users and clinicians. At this stage NCIR Administrator should review inventory and clean it up prior to transition, to facilitate the process.

Next steps in the transition:

1. Add additional users and clinicians to NCIR or ensure all necessary users have the appropriate access.
2. Prior to the final cut-over date and time indicated in the transition complete email, sites should keep administrations, wastage, and inventory up to date in CVMS.
3. Prior to the final cut-over date and time indicated in the transition complete email, sites should run any necessary CVMS reports that would assist with transition activities, verification, and/or reconciliation (e.g., CVMS users who will need NCIR access, inventory, wastage, administrations, etc.).
4. All users will receive a final transition complete email that will indicate when the remaining transition activities will occur and when you can begin using NCIR for COVID-19 vaccine management and reporting.
5. Following the final transition complete email, NC DHHS will transfer your remaining COVID-19 inventory in CVMS to NCIR. Within CVMS the inventory status will be marked as "Transferred to NCIR."
6. All CVMS users having a primary relationship with the locations/sites under a single organization entity will be deactivated in CVMS by NC DHHS and will no longer be able to access that location/site through the CVMS Provider Portal.
   a. CVMS users having relationships with locations/sites under a different organization entity who will be continuing to use CVMS for COVID-19 vaccine management and/or reporting will retain access to those locations/sites.
   b. The Organization Administrator, CMO, CEO, and Vaccine Coordinators will retain their access to the CVMS Provider Enrollment Portal.
7. On the final cut-over date and time indicated in the transition complete email, all users associated with your site should be able to log into the NCIR using their NCID username and password and begin COVID-19 vaccine management and reporting.

STEP 7: Add/Confirm Additional Users

NCIR Administrators are responsible for adding additional users and clinicians. All users must complete the NCIR Confidentiality Agreement. The NCIR Administrator should maintain these on site.

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

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

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

Steps to create users:

1. Select **Manage Users**
2. Click **Add User**
3. Type in the NCID
4. Click **Verify**
5. Confirm that the information is correct
6. Choose the appropriate User Role
7. Click **Save**

Steps to create clinicians:

1. Select **Manage Clinicians**
2. Click **Add Clinician**
3. Select a **Role** and **Credentials**
4. Complete the identifying information
5. Select the clinician's site
6. Click Save

HELPFUL LINKS:

- Managing Users
- Managing Clinicians and Physicians

Your NCIR transition is NOT complete! DO NOT begin reporting COVID-19 vaccine administrations in NCIR until indicated in the final transition complete email. Transition times may vary based on the Organization's circumstances. Expected timelines are provided in the NCIR Administrator welcome email.

Step-by-Step Instructions for NCIR Enrollment

STEP 8: Receive Transition Complete Email

The day prior to beginning use of NCIR to manage COVID-19 vaccines all users will receive a transition completion email with next steps. It will also indicate that on 6pm of the day the email is received all sites should discontinue use of CVMS and will begin using NCIR to manage COVID-19 vaccines the following day at 8am. If your organization has need of a specific timeline please reach out to the IB team.

STEP 9: Deactivate CVMS User Accounts & Transfer Inventory

Starting at 6pm of the day the transition complete email is received, the DHHS IB Enrollment team will deactivate CVMS access for all users associated with the Organization and transfer existing COVID-19 vaccine inventory from CVMS to NCIR

As a reminder, CVMS users having relationships with locations/sites under a different organization entity who will be continuing to use CVMS for COVID-19 vaccine management and/or reporting will retain access to those locations/sites, and the Organization Administrator, CMO, CEO, and Vaccine Coordinators will retain their access to the CVMS Provider Enrollment Portal.

HELPFUL LINKS: Logging into NCIR and Common Issues

You can now begin managing COVID-19 vaccine in NCIR!

Vaccine Management

STEP 10: Receive and Manage Vaccine Inventories

Users designated as "Inventory Control" or "Administrator" in NCIR can receive and process vaccine inventories in the system.

CDC COVID-19 vaccine guidelines require that you maintain accurate COVID-19 inventory levels for each location you support.

After clicking **Manage Orders in NCIR**, you can view vaccine orders. You will now also be able to accept orders through the NCIR but the process for placing COVID-19 vaccine orders is done outside of NCIR.

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

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

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

HELPFUL LINKS:

- Ordering, Transferring and Inventory Management for COVID-19 Vaccine
- NCIR to CVMS Transfer Form

STEP 11: Add New Clients

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

If no client is found, Administrators must complete the following steps to Add Clients:

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

HELPFUL LINKS:

- Searching for Clients
- Adding New Clients

STEP 12: Document Vaccination

To document COVID-19 vaccination administration:

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

HELPFUL LINKS:

- Adding and Editing New Immunizations
- Adding and Editing Historical Immunization
- Reviewing and Printing Immunization Records