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

Add locations to the vaccine site locator website

User Guide

Version 13
April 4, 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](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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This user guide will explain how to:

- Edit a location's information on the Vaccine Site Locator website
- Add a location to the Vaccine Site Locator website
- Remove a location from the Vaccine Site Locator website

The CDC's Vaccine Site Locator website (https://vaccines.gov) helps recipients find COVID-19 vaccine providers close to them.

It displays COVID-19 providers' locations and their websites and/or phone numbers where eligible recipients can schedule an appointment to receive a COVID-19 vaccine.

ALL providers that are receiving COVID-19 vaccine dose allocations and are taking appointments or walk-ins should be displayed on the Vaccine Site Locator website.

The only providers that receive allocations that should not be on the Vaccine Site Locator website are providers who are only vaccinating selected recipients (e.g., long term care, correctional facilities, or primary care providers only vaccinating their own patients).
Edit Location Details Displayed on the Vaccine Site Locator Website
This user guide is for users with the **Healthcare Location Manager profile only**.

This section outlines procedures for ensuring that permanently-enrolled locations appear on the Vaccines.gov website. A permanently-enrolled location is one which has been created through the Provider Enrollment process and approved by the state. Pop-up locations (discussed in the next section) are temporary locations that are supported by their parent permanently-enrolled location.

2. Enter your NCID username and password
Step 2 of 16: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab
Step 3 of 16: Select the Specific Location

1. Click on the LOCATION NAME you wish to edit
Step 4 of 16: Edit your Location Record

1. Click EDIT
Step 5 of 16: Change Location Name

1. Edit **LOCATION NAME** to change the name that displays on the Vaccine Site Locator website.

   **Note:** do not update your linked account or Event type. The event type will be set to “Not Applicable” for your locations enrolled in the vaccination program, and receiving vaccine allocations, versus short- or long-term community event for pop-up vaccine clinics.

   **Tips**
   - The **LOCATION NAME** field will have to be less than 80 characters.
   - Click **SAVE** to save any changes.
Step 6 of 16: ADD or REMOVE a Location from the Vaccine Site Locator Website

1. Ensure that EVENT TYPE is set to “Not Applicable” for permanent locations.

2. Select Yes to DISPLAY ON VACCINE SITE LOCATOR to add your site to the Vaccine Site Locator website.
   - This should be checked if your location provides COVID-19 vaccines to the general public.

3. Select No to DISPLAY ON VACCINE SITE LOCATOR to remove your site from the Vaccine Site Locator website.

4. Continue with any other edits to your location and SAVE.

Tips
Only select No to DISPLAY ON VACCINE SITE LOCATOR if your location is a correctional facility, long-term care facility, or a location that is providing COVID-19 vaccines within a restricted group of recipients.
Click SAVE to save any changes.
Step 7 of 16: Change Scheduling Phone Number and Website

Enter at least one of the following:

1. **A valid APPOINTMENT SCHEDULING WEBSITE** link to your location’s website
   - You should enter the full URL for the website where people can book appointments if applicable

2. **A valid APPOINTMENT PHONE NUMBER**
   - This should be a public phone number that people can call for appointments or information

Note: If you are using the scheduling feature in CVMS, you are not required to enter an Appointment Scheduling Website or Appointment Phone number.

If you are NOT using the scheduling feature in CVMS, you must enter **AT LEAST ONE** of the two contact fields listed above. You may enter both if applicable.
Step 8 of 16: Identify Vaccine Brands Your Scheduling Location Is Administering (optional)

For primary locations, **CVMS will automatically select all vaccine brands for which you have inventory available.** CVMS will review and update inventory on the Vaccine Site Locator website daily at 5:00 AM and 5:00 PM so that it is in sync with the inventory available for this location.

If you prefer to **MANUALLY** manage the vaccine brands recipients will see, you can follow the instructions below:

1. Select the **BRAND OVERRIDE** checkbox
2. **EDIT** the **AVAILABLE VACCINE BRAND** field pick-list by using the left facing arrow to **DE-SELECT** the vaccine brands that will NOT be administered at your location
3. Continue with any other edits to your location and **SAVE**
Step 9 of 16: Using the Brand Override Functionality

- By selecting **BRAND OVERRIDE**, you will override CVMS’ automatic COVID-19 vaccine brand selection based on your location’s inventory and you will be responsible for ensuring that the **CHOSEN** brand(s) reflect what is available in this location’s inventory on an on-going basis.

- If you decide that you no longer wish to override CVMS’ automatic COVID-19 vaccine brand selections, **DE-SELECT** Brand Override to opt-out of the override feature.

- The system will then update your COVID-19 vaccine brands to align with the location’s inventory daily at 5:00 AM and 5:00 PM.

**Vaccine Site Locator Website - Recipient View:**

When a vaccine brand is de-selected from the **CHOSEN** list, the location will not appear on the Vaccine Site Locator website when a recipient searches by the vaccine product.
Step 10 of 16: Identify the Minimum Age of Recipients Served (Optional)

Identify the minimum age of vaccine recipients that the location will serve (optional):

1. Select either the minimum age in years (starting at 5 through 18+)
   **OR**
2. Select the minimum age in months (6)
3. Continue with any other edits to your location and SAVE
Step 11 of 16: Verify Your Location's Address

1. Verify your location’s address.
2. Continue with any other edits to your location and **SAVE**
Step 12 of 16: Complete Provider Survey (Optional)

Complete the PROVIDER SURVEY for your vaccination location to share additional information with the public (optional):

1. Do you Accept Insurance?
2. Do you accept walk-ins (or only appointments)?
3. Provider Support for Non-English Speaker? If the answer is Yes, select the additionally supported languages (see next slide of this user guide)
4. Are you providing in-home vaccinations?
5. Participant Name and Email: this information will not be displayed on the website, but will serve as a point of contact if there are any questions from NCDHHS
6. PreScreen Web Address: enter the direct link to your organization or jurisdiction’s pre-screener that is required to make an appointment (if applicable and different from the Appointment Scheduling Website)
1. Select the **LANGUAGES** that you support at this location.
1. Enter the **APPOINTMENT SCHEDULE** (opening hours during which the public can receive a vaccine at your location)

Note: If you are using the scheduling feature in CVMS, you must also create the Availability Schedule on the Availability tab of the location.
Step 15 of 16: Activate the Scheduling Feature of CVMS and Set Appointment Dates (Optional)

1. If your location will use the scheduling feature in CVMS, check the **CVMS SCHEDULING** box.

2. Set the **START DATE** to be the first date for which you would like recipients to book appointments initially.

3. Set the **CLOSING DATE** to be the last date for which you would like recipients to book appointments initially.

4. Click **SAVE**

   **Note:** You can change the Start Date and Closing Date later, but recipients will be able to book appointments once the location is displayed on the Vaccine Site Locator website.

   You can choose to display the location on the Vaccine Site Locator website later once you are ready for the location to be displayed.

**Tips**
You will be able to check the CVMS Scheduling box only after the scheduling feature is enabled for your location. See the **CVMS Provider Portal Manage Appointment Scheduling User Guide** for more information about utilizing the scheduling feature in CVMS at [https://covid19.ncdhhs.gov/step-9-invite-recipients-self-schedule-their-appointments-user-guide-0](https://covid19.ncdhhs.gov/step-9-invite-recipients-self-schedule-their-appointments-user-guide-0).
Step 16 of 16: Receive Confirmation of Changes

Once you are done editing, and have clicked SAVE to save the changes, a success notification will appear at the top of the screen.

It may take up to 7 business days for your changes to appear on Vaccines.gov. Contact the NC Vaccines Help Desk for assistance.
Create Pop-Up Community Vaccine Event Locations
Step 1 of 13: Navigate to the Locations Tab

If you organize a community COVID-19 vaccine event, you must add these locations to CVMS and display them on the Vaccine Site Locator website.

It can take **up to 7 business days** for your community vaccine event to show on https://vaccines.gov. The NCDHHS will need to manually register your location with the CDC to obtain a unique identifier. Only then will your location show on the Vaccine Site Locator website.

1. To begin, click on the **LOCATIONS TAB**

**Tips**

Adding your vaccine event to CVMS does not impact dose allocation, or where doses are shipped to.
Step 2 of 13: Click New

1. Click the **NEW** button
Step 3 of 13: Name Your Location

1. Enter LOCATION NAME (location Name must be less than 80 characters)

2. Select an ACCOUNT
   • Select the provider account that the event is affiliated with. If your user ID is associated with multiple providers, you can select from those providers here
Step 4 of 13: Select Event Type

Indicate whether this location is a community vaccine event in EVENT TYPE.

1. Select EVENT TYPE from list
   - Select “Short Term Event” if the location is a pop-up event that will run for less than 3 weeks
   - Select “Long Term Event” if the location is an event that will run for 3 weeks or longer
Step 5 of 13: Display your Location on the Vaccine Site Locator Website

1. Select **DISPLAY ON VACCINE SITE LOCATOR = YES**
   - Only select **DISPLAY ON VACCINE SITE LOCATOR = NO** if your location is a correctional facility, long-term care facility, or a location that is providing vaccines to a selected group of recipients.

2. Enter a valid **APPOINTMENT SCHEDULING WEBSITE** link to your location’s website.

3. Enter a valid **APPOINTMENT PHONE NUMBER** for recipients to contact your location.

   **Note:** If you are using the scheduling feature in CVMS, you are not required to enter an Appointment Scheduling Website or Appointment Phone number. If you are NOT using the scheduling feature in CVMS, you must enter **AT LEAST ONE** of the two contact fields listed above. You may enter both if applicable.

4. Enter your **PROVIDER WEBSITE** for recipients to find more information on your location (optional).
Step 6 of 13: Identify Vaccine Brands Your Scheduling Location Is Administering

1. Select products in the AVAILABLE vaccine brand field pick list
2. Click on the Arrow pointing to the right to add them to the CHOSEN list to decide which brands recipients will see on the Vaccine Site Locator website

Tips
For pop-up locations, the system will NOT automatically select vaccine product brands. **You will need to select all vaccine product brands to be displayed on the Vaccine Site Locator website manually.**
Step 7 of 13: Identify the Minimum Age of Recipients Served (Optional)

Identify the minimum age of vaccine recipients that the location will serve (optional):

1. Select either the minimum age in years (starting at 5 through 18+)
   OR
2. Select the minimum age in months (6)
Step 8 of 13: Enter Address

1. Enter the Street Address, City, State, Postal Code, and County

**Tips**

The Address is the location where you are vaccinating recipients; this is the address that will be displayed on the Vaccine Site Locator website (please do not enter the location’s shipping address).

After making changes, please connect to the Vaccine Site Locator website at https://vaccines.gov to check that the geolocation correctly identified your location’s address.

There will be a delay (up to 3 days) on syncing before your updated address is shown on the Vaccine Site Locator website.
Step 9 of 13: Complete Provider Survey (optional)

Complete the **PROVIDER SURVEY** for your vaccination location to share additional information with the public (optional):

1. **Do you Accept Insurance?**
2. **Do you accept walk-ins** (or only appointments)?
3. **Provider Support for Non-English Speaker?** If the answer is Yes, select also supported languages (see next slide in this user guide)
4. **Are you providing in-home vaccinations?**
5. **Participant Name and Email:** this information will not be displayed on the Vaccine Site Locator website, but will serve as a point of contact if there are any questions from NCDHHS
6. **PreScreen Web Address:** enter the direct link to your organization or jurisdiction’s pre-screener that is required to make an appointment (if applicable and different from the Appointment Scheduling Website)
Step 10 of 13: Select the Supported Languages (optional)

1. Select the LANGUAGES that you support at this location
Step 11 of 13: Enter the Appointment Schedule

1. Enter the **APPOINTMENT SCHEDULE** (opening hours during which the public can receive a vaccine at your location)

Note: If you are using the scheduling feature in CVMS, you must also create the Availability Schedule on the Availability tab of the location.
Step 12 of 13: Activate the Scheduling Feature of CVMS and Set Appointment Dates (Optional)

1. If your location will use the scheduling feature in CVMS, check the CVMS SCHEDULING box.

2. Set the START DATE to be the first date for which you would like recipients to book appointments initially.

3. Set the CLOSING DATE to be the last date for which you would like recipients to book appointments initially.

4. Click SAVE.

   **Note:** You can change the Start Date and Closing Date later, but recipients will be able to book appointments once the location is displayed on the Vaccine Site Locator website.

You can choose to display the location on the Vaccine Site Locator website later once you are ready for the location to be displayed.

**Tips**

You will be able to check the CVMS Scheduling box only after the scheduling feature is enabled. See the CVMS Provider Portal Manage Appointment Scheduling User Guide for more information about utilizing the scheduling feature in CVMS at https://covid19.ncdhhs.gov/step-9-invite-recipients-self-schedule-their-appointments-user-guide-0
Step 13 of 13: Confirmation

ALWAYS CLICK SAVE AFTER YOU ARE DONE

Once you are created the location and saved the changes, a success notification will appear at the top of the screen.

If your new location does not populate on Vaccines.gov within 7 business days, contact the NC Vaccines Help Desk for assistance.

Audience
Healthcare Location Manager
Appendix
Users with a Healthcare Location Manager profile can list their information on the Vaccine Site Locator website (https://vaccines.gov).

As a Healthcare Location Manager, you can edit your location information that is displayed on the Vaccine Site Locator website (https://vaccines.gov).

In the CVMS Provider Portal, you can click on the name of the location you wish to edit and then click on the edit button.

You can also add new locations for community vaccine events that can be displayed on the Vaccine Site Locator website.

To create a new location for a community vaccine event, you can click on the new button.
# Vaccine Site Locator Key Terms

<table>
<thead>
<tr>
<th><strong>Public Location Name</strong></th>
<th>The location name that appears on the Vaccine Site Locator website (<a href="https://vaccines.gov">https://vaccines.gov</a>).</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Community Vaccine Event</strong></td>
<td>Select Long-Term Events for recurring pop-up events (i.e., weekly). Select Short Term Events for one-time pop-up community vaccine events. For permanent locations, select ‘Not Applicable’.</td>
</tr>
<tr>
<td><strong>Display on Vaccine Site Locator</strong></td>
<td>This field MUST have the value of YES to appear on the public Vaccine Site Locator website. Select NO if your location should NOT be listed. You should only ever set it to NO if you are only vaccinating a limited recipient population (e.g., long-term care facility, prison).</td>
</tr>
<tr>
<td><strong>Appointment Scheduling Website</strong></td>
<td>Enter the public facing website URL where people can schedule appointments or learn how to get vaccinated at your site. You can leave blank this field if you are using the scheduling feature in CVMS.</td>
</tr>
<tr>
<td><strong>CVMS Scheduling</strong></td>
<td>Indicates that this location will use the scheduling feature in CVMS. This feature is optional.</td>
</tr>
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</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 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

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<tr>
<th>Version</th>
<th>Date of Change</th>
<th>Changes Made</th>
<th>Author</th>
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<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>Tabitha McKelvy</td>
</tr>
<tr>
<td>3</td>
<td>04/01/2021</td>
<td>• Update screenshots to add Available Vaccine Brand field to location record</td>
<td>Tabitha McKelvy</td>
</tr>
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</table>
| 4       | 04/16/2021     | • Updated screenshots and content to show Enable Scheduling and Display on Vaccine Site Locator dropdown  
• Added tip to set the Location Setting to Default | Kevin Kauffman                                                |
| 5       | 05/17/2021     | • Updated screenshots and content to show the scheduling dates being on the location details  
• Removed references to Location Setting                   | Kevin Kauffman                                                |
| 6       | 06/11/2021     | • Updated new location information to align with CDC Vaccine Site Locator    | Kevin Kauffman                                                |
| 7       | 06/23/2021     | • Updated order of new and edit location fields                               | Kevin Kauffman                                                |
| 8       | 07/12/2021     | • New user guide format                                                       | Vanessa Kemajou                                              |
| 9       | 08/26/2021     | • Help Desk references Updated                                               | Kaitlin Gates                                                |
| 10      | 09/15/2021     | • Help Desk hours updated                                                    | Kaitlin Gates                                                |
| 11      | 09/27/2021     | • Updated screenshots to reflect current tabs                              
• Indicated optional/mandatory fields                        | Darrell Lee                                                   |
| 12      | 12/17/2021     | • Adjusted titles to differentiate between permanent and pop-up locations   
• Definition of permanently-enrolled location and pop-up location added  
• Added steps to review Account and Event Type  
• Updated title of slide to match action taken  
• Added guidance to contact the help desk if location does not populate on website within the specified time | Darrell Lee                                                   |
| 13      | 04/04/2022     | • 9-13, 25-28: Screenshots updated                                           | Darrell Lee                                                  |
|         |                | • 15: Added slide to show optional minimum recipient age (permanent location) |                                                              |
|         |                | • 16: Added slide to show editing address                                    |                                                              |
|         |                | • 29: Added slide to show optional minimum recipient age (pop-up)            |                                                              |