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

Check-in recipients and document vaccination User Guide

Version 23
April 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
In this User Guide, we will discuss how the Healthcare Provider will be able to create recipient records, register recipients, book appointments for recipients, record the details of their vaccine administration, edit the recipient’s information or vaccine administration details, and view the recipient’s vaccine information.

It is important to note that to document a recipient Vaccine Administration in CVMS, the recipient MUST BE registered in CVMS. Registered in CVMS means the Recipient Record is found in CVMS, and the COVID-19 Vaccine Registration form is complete.

This set of activities can be performed by a user with a HEALTHCARE PROVIDER, HEALTHCARE LOCATION MANAGER, or Statewide Location Manager.

If your location enabled the scheduling feature in CVMS, please also check the Scheduling Feature at Point of Care and Vaccine Administration section of this guide.

Now, let’s get started!
Checking-in a Recipient at the Front-desk of the Point of Care
Confirm Location of Operations
(only for users associated to multiple locations)
Step 1 of 4: Verify Location for Operations

Before you begin logging checking in recipients for VACCINE ADMINISTRATION, you will need to verify which location you are operating from.

The current location you are operating from is displayed at the top left of the screen. If the location is correct, no further action is required.

Tips
To learn more about getting access to other locations, speak to your location’s HEALTHCARE LOCATION MANAGER in charge of setting up user accounts.
Step 2 of 4: Begin Switching Locations

If the location needs to be changed (e.g., you are operating in a different clinic location than the one currently displayed), continue following the instructions in this section.

1. Select the **SWITCH LOCATIONS** button
2. A pop-up window will appear asking you to select the location you would like to be operating in
Step 3 of 4: Submit New Location To Operate In

1. Select the location that you would like to operate in
2. Verify that the address matches the desired location
3. Click SUBMIT

Tips
To see a list of locations you have access to operate in / can search for, speak to your location’s HEALTHCARE LOCATION MANAGER or your location’s VACCINE COORDINATOR.
Step 4 of 4: Confirm Successful Location Switch

Verify that the location successfully switched by checking the display at the top left of the Home Tab.
Standard Point of Care Walk-in Appointment: Recipient is Registered in COVID-19 Vaccine Portal
Step 1 of 5: Navigate to the CVMS Provider Portal Home Page

From the HOME PAGE, you will complete a simple SEARCH using the APPOINTMENT WALK-IN TOOL on your home page before the recipient receives the COVID-19 vaccine.

Tips
If you have access to multiple locations in CVMS, be sure to look at the location you are operating in by looking at the top left of the screen under the Tabs bar.

If you need to change the location to match where you are operating for the day, select the SWITCH LOCATIONS button and choose the applicable location.
Step 2 of 5: Search for the Recipient

To get started, you will search for the **RECIPIENT** to help you **VERIFY IDENTITY** before creating their appointment.

1. Enter the recipient’s **NAME**, **DATE OF BIRTH** and / or **EMAIL ADDRESS** in the Appointment Walk-in Tool located on the Home Page.
2. Only one field is required to search.
3. Click **SEARCH**

**Note**: To document a recipient Vaccine Administration in the CVMS Provider Portal, the recipient MUST BE registered in CVMS. Registered in CVMS means the Recipient Record is created, and the COVID-19 Registration Form is complete.
Step 3 of 5: Review Recipient's Information

After clicking search, you will see your RECIPIENT SEARCH RESULTS populate underneath the Appointment Walk-In Tool. You will be able to view the Recipient’s NAME, DATE OF BIRTH (DOB), EMAIL, VACCINE PRODUCT NAME (if they have already received a dose), VACCINE DOSE STATUS, and DATE OF ADMINISTRATION (if they have already received a dose).

Tips

VACCINE DOSE STATUS indicates where a recipient is in their progress toward being vaccinated. Possible statuses include:

- REGISTERED
- DOSE 1 SCHEDULED
- DOSE 1 ADMINISTERED
- DOSE 1 CANCELLED
- DOSE 2 SCHEDULED
- DOSE 2 ADMINISTERED
- DOSE 2 CANCELLED
- ADDITIONAL DOSE/BOOSTER SCHEDULED
- ADDL DOSE/BOOSTER ADMINISTERED
- ADDL DOSE/BOOSTER CANCELLED
Step 4 of 5: Create the Appointment Booking

Once you verified the recipient’s identity, you can officially CREATE THEIR APPOINTMENT BOOKING. This can occur for a recipient’s first dose, second dose, or an ADDITIONAL DOSE / BOOSTER if one is required.

1. In your SEARCH RESULTS, select the CORRECT RECIPIENT RECORD
2. Click APPOINTMENT BOOKING (you may also click the arrow to the right to select which specific appointment this is for – selecting a specific dose appointment will not affect which vaccine dose you may select during vaccine administration)
3. A message confirming the appointment booking was created will appear
4. Click OK
The appointment that is created will be available to you under TODAY’S APPOINTMENTS.

To begin the VACCINE ADMINISTRATION process, the recipient will require an APPOINTMENT BOOKING or APPOINTMENT CONFIRMATION NUMBER (if scheduling feature in CVMS is enabled).

Note: To know more about the VACCINE ADMINISTRATION process, please refer to the Enter a Vaccine Administration Record section of this user guide.
Exception 1: Recipient Record is not yet Created in CVMS
1. From the HOME PAGE, enter the recipient’s name in the APPOINTMENT WALK-IN TOOL.

2. If the recipient’s record does not appear, this means that the recipient is either not registered or does not have a record.
Step 2 of 9: Search for the Recipient Record

To see if the recipient has a record, but is not yet registered, search for them in the **RECIPIENT** tab.

1. Navigate to the **RECIPIENT** tab
2. Enter the recipient’s **NAME** (first name and last name) in the search bar, being sure to enter at least three characters to receive any results
3. To help narrow results, enter the recipient’s **DATE OF BIRTH** or **EMAIL ADDRESS** in the appropriate field

**Note:** The Date of Birth field can only be used if there is a name or email address in the search bars, and cannot be used by itself

4. Click **SEARCH**

**Tips**
A Vaccine Administration cannot be documented in CVMS if the recipient is not registered in CVMS. Registration is complete when the **COVID-19 Vaccine Registration** form is entered into CVMS. This can occur in the **COVID-19 VACCINE PORTAL** or the **CVMS PROVIDER PORTAL**.
Step 3 of 9: Search for the Recipient Record

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in the **RECIPIENTS WITHIN CVMS** section.

If there are **NO** results in the **RECIPIENTS WITHIN CVMS** section, or the **CORRECT** recipient cannot be found, this indicates that the recipient does not have a record in CVMS, and must be created on-site.
Step 4 of 9: Ask the recipient to answer the COVID-19 Vaccine Registration Form

OPTION 1 – Register the recipient by filling out the COVID-19 Vaccine Registration form with the recipient

1. Click the CREATE NEW RECIPIENT button on the RECIPIENT tab to bring up a pop-up form, read the questions and type the recipient’s answers

OPTION 2 – Ask the recipient to answer the questions on a Paper Copy

1. Instruct the recipient to fill out a paper copy of the COVID-19 Vaccine Registration form (the PDF file is available under the HELP & INFORMATION TAB or on the NC Immunization Branch website at CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19 labeled as RECIPIENT REGISTRATION AND COVID-19 VACCINE ADMINISTRATION FORM (in English and Spanish)

2. Give the recipient a few minutes to fill the form

3. Click the CREATE NEW RECIPIENT button on the RECIPIENT tab to bring up a pop-up form

Tips
Print several copies of the COVID-19 Vaccine Registration form to keep on hand to provide recipients.
Step 5 of 9: Create the Recipient Record

Fill in the required fields.

1. If the recipient cannot provide an email address, select the **NO EMAIL PROVIDED** checkbox. Please inform the recipient that in the absence of an email address, it will not be possible for them to connect to the COVID-19 Vaccine Portal and view their Vaccine Information PDF. You can however access the Vaccine Information PDF from the CVMS Provider Portal and print it for them if needed.

2. Enter **BIRTHDATE**

3. Select **CREATE RECIPIENT**

**Note:** A recipient’s first and last name must contain at least 2 characters. If you try to enter a patient’s name with less than 2 characters, the system will raise a validation error. This error may be bypassed if the recipient’s name is less than two characters.
Step 6 of 9: Begin the recipient’s COVID-19 Vaccine Registration

Once the recipient is created, a new browser tab will open for you to fill out the recipient’s COVID-19 Vaccine Registration form using the paper copy the recipient filled out.

1. Review the information statement
2. Click NEXT

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager
Step 7 of 9: Enter the Recipient's Demographic Information and Vaccine Group

1. Enter the recipient’s demographic information, contact information, language, and disability as entered by the recipient on COVID-19 Vaccine Registration form

2. Click NEXT

Tips

We strongly encourage recipients to provide a valid email address as it will give them access to the COVID-19 Vaccine Portal, from where they can download their Vaccine Information PDF.

If a recipient lives in an apartment or suite, use the optional ADDRESS LINE 2 field.
Step 8 of 9: Submit the Recipient's Information

Review the information you entered from the paper copy of the COVID-19 Vaccine Registration form.

1. Validate that the information entered matches the information given by the recipient
2. To make changes, select PREVIOUS
3. If the information is correct, select SUBMIT

Tips
If you have any questions about what a recipient wrote on a paper registration form, ask them for clarification before submitting.
**Step 9 of 9: Verify the Recipient's Registration**

1. The **REGISTRATION IS COMPLETE**
2. The recipient’s **RECIPIENT DOSE STATUS** is updated to **REGISTERED** and is visible on the Recipient tab.

**Tips**

If the recipient informs you that their health information is **NOT CORRECT**, ask the recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL** or you can directly edit the registration information in the CVMS Provider Portal.
Finalize Walk-In Appointment Booking

Now that the recipient has been registered successfully, you can return to the HOME page and follow the Standard **APPOINTMENT WALK-IN** Booking process.
Documenting a Vaccine Administration
Enter Vaccine Administration Record
Step 1 of 10: Begin Vaccine Administration

There are three methods to begin the VACCINE ADMINISTRATION process. When a RECIPIENT walks in to receive their COVID-19 vaccine and they do not have a scheduled appointment, the provider who initially verifies their identity will create an Appointment Booking for the recipient.

The provider who will administer the COVID-19 vaccine will select the recipient under TODAY’S APPOINTMENTS on the HOME PAGE which will begin the VACCINE ADMINISTRATION process.

Tips
To review how to check-in a recipient through the Appointment Walk-In tool, review the Booking Walk-In Appointments section of this User Guide.
Step 2 of 10: Begin Vaccine Administration

Alternatively, if you are a provider that has signed up for the scheduling feature in CVMS, you can begin the VACCINE ADMINISTRATION PROCESS by entering the recipient’s APPOINTMENT CONFIRMATION NUMBER that they received after scheduling their appointment online using the scheduling feature in CVMS.

1. Enter the APPOINTMENT CONFIRMATION NUMBER for the recipient
2. Click GO

Tips
For information on how to enable the scheduling feature in CVMS, please refer to the Step 10 – Invite Recipients to Self-Schedule Their Appointments User Guide at CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19.
Step 3 of 10: Begin Vaccine Administration

Lastly, for those providers with access to the scheduling feature in CVMS, the **VACCINE ADMINISTRATION** process can also begin from the **APPOINTMENTS TAB**.

1. Navigate to the **APPOINTMENTS TAB**
2. Find the **CORRECT APPOINTMENT BOOKING** for the recipient you would like to begin the Vaccine Administration for
3. Click the drop-down arrow to the right of their name
4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**
Step 4 of 10: Receive Verbal Consent

Beginning the VACCINE ADMINISTRATION process takes you to the PATIENT VERIFICATION & SCREENING page.

1. Review the recipient’s health information on the right-hand side of the screen and click NEXT

2. On the VACCINE CONSENT AND MEDICAL HISTORY page, read the DISCLOSURE STATEMENT to the recipient

3. After you RECEIVE VERBAL CONSENT, you can CHECK the check box indicating that consent was provided and click NEXT

Note: The recipient’s MEDICAL HISTORY will be displayed on the right-hand side of the screen throughout the entire Vaccine Administration Process.
**Step 5 of 10: Provide the Vaccine Information Sheet / EUA Fact Sheet**

Before you administer the COVID-19 vaccine, you must also PROVIDE the VACCINE INFORMATION SHEET OR EMERGENCY USE AUTHORIZATION (EUA) FACT SHEET and the V-SAFE INFORMATION SHEET to the recipient or guardian.

1. Obtain copies of the Vaccine Information Sheet / EUA Fact Sheet at this website
   a. Pfizer (Vaccine Information Fact Sheet): [https://www.fda.gov/media/144414/download](https://www.fda.gov/media/144414/download)
   b. Moderna (EUA Fact Sheet): [https://www.fda.gov/media/144638/download](https://www.fda.gov/media/144638/download)
   c. Janssen (EUA Fact Sheet): [https://www.fda.gov/media/146305/download](https://www.fda.gov/media/146305/download)

2. Obtain copies of the V-safe Information Sheet at this website:
   [https://immunize.nc.gov/providers/ncip/pdf/v_safe_poster_508.pdf](https://immunize.nc.gov/providers/ncip/pdf/v_safe_poster_508.pdf)

3. Provide the recipient or guardian with the Vaccine Information / EUA Fact Sheet prior to vaccination.

4. Ask the recipient if they have any questions about the risks and benefits of receiving the COVID-19 vaccine.

5. Counsel the recipient on the importance of enrolling in V-safe to report any adverse events following vaccination.
Step 6 of 10: Review the Vaccine Administration Details

Once you receive the recipient’s consent and provide them with the appropriate Vaccine Information Sheet / EUA Fact Sheet, you will continue to the **VACCINE ADMINISTRATION** page. This page is where you will **CAPTURE KEY INFORMATION** about the **COVID-19 VACCINE ADMINISTERED**.
Step 7 of 10: Vaccine Administration Details for the Second Vaccine Dose

If your recipient has already RECEIVED A DOSE of the COVID-19 vaccine through a CVMS Provider, you will see a summary of the dose details in the VACCINATION LOG at the top of the VACCINE ADMINISTRATION PAGE.

Dose Details will include:
- Dosage (1st, 2nd, Additional)
- Date and Time
- Administered By
- On Behalf Of (Clinician)
- Location
- Vaccine Inventory
- Vaccine Product
- Lot Number

If a recipient received a dose from a provider other than a CVMS provider or Federal Pharmacy Partner (e.g., out of state, through the Department of Veterans Affairs), the dose will not appear in the VACCINATION LOG. You may still mark the administration as a SECOND or ADDITIONAL DOSE / BOOSTER. In that instance, a warning label will appear at the top of the screen prompting you to verify the selection.

Tips
- Verify if a prior dose was given to the recipient.
- Selecting SECOND DOSE will put the recipient into DOSE 2 ADMINISTERED status.
- Selecting ADDITIONAL DOSE / BOOSTER will put the recipient into ADDITIONAL DOSE / BOOSTER ADMINISTERED status.

Audience
- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager
Step 8 of 10: Enter Vaccine Administration Details

On the VACCINE ADMINISTRATION page, you will capture all VACCINE DETAILS.

- Populate all REQUIRED vaccination details
  1. Injection Site
  2. Dose (See ENTER AN ADDITIONAL DOSE / BOOSTER ADMINISTRATION section for further considerations)
  3. Route
  4. Date & Time of Vaccination (This field will default to the current date and time, but can be edited to record a vaccine administered in the past)

Note: The field ON BEHALF OF (CLINICIAN) allows you to enter information on behalf of another clinician who administered the COVID-19 vaccine.

Tips

Use the drop-down for the ON BEHALF OF (CLINICIAN) field and type the first letter of the clinician’s name.

If the individual completing the form is the person who administered the vaccine, DO NOT ENTER anything in the ON BEHALF OF (CLINICIAN) field.
Step 9 of 10: Enter Vaccine Administration Details

1. Continue populating all **REQUIRED** vaccination details
   - Vaccine Product (Vaccine Type)
   - Available Vaccine Inventory (what lot?)

   **Note**: If you select a SINGLE-DOSE vaccine product, you must select **FIRST DOSE**, otherwise you will receive an error.

2. Enter any additional notes that are relevant in the **NOTES** text field

3. **REVIEW ALL VACCINE DETAILS**

4. Click **NEXT**

   *If you are administering a second dose or additional dose of COVID-19 vaccine, please be sure to confirm the COVID-19 vaccine is from the **SAME MANUFACTURER** as the first COVID-19 vaccine dose.*
Step 10 of 10: Finish an Appointment

If you have administered a **SINGLE-DOSE** product of this is a second dose appointment, you will be routed back to the **HOME PAGE**.

If you have administered the first dose of a **TWO-DOSE** product, you will be routed to the **SCHEDULE FOLLOW-UP** page. This page will remind you to tell the recipient to schedule their second dose appointment. You can click **FINISH APPOINTMENT** to close the appointment and bring up the **HOME PAGE**.

*If the recipient used the scheduling feature in CVMS to book their first appointment, you will see a button labeled **BOOK SECOND DOSE** on this page. See the **SCHEDULE A SECOND DOSE APPOINTMENT** section for more details on that process.*
Edit Vaccine Administration Details
If a RECIPIENT has incorrect details entered during Vaccine Administration, the Healthcare Provider must EDIT the details to ensure data accuracy.

To begin, navigate to the APPOINTMENTS tab.

Healthcare Providers can only update Vaccine Administration details for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.
Step 2 of 8: Locate Recipient

Clicking on the Appointments tab takes you to a list view of all Appointments for your location. Verify that you are currently logged in to the same location that the recipient received their vaccine.

Tips
- The Appointments tab will default to show you appointments that were scheduled for the same day you are logged in.
Step 3 of 8: Select Appointment to be Updated

To begin editing the details of the VACCINE ADMINISTRATION, you must first locate the correct APPOINTMENT RECORD.

1. Enter the name of the recipient in the Search field, and adjust the date range to capture the date of the appointment that needs updating.
2. Click SEARCH.
3. Click the CORRECT APPOINTMENT RECORD for the recipient. The correct record will be the one that shows a VACCINE STATUS as either DOSE 1 (or 2) ADMINISTERED or ADDITIONAL DOSE / BOOSTER ADMINISTERED.

Tips
Alternatively, you may search for the recipient via the RECIPIENT TAB, locate their recipient record, and click on their Appointment record.
Step 4 of 8: Review Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will display for the recipient.

1. All Vaccination details are visible including:
   - Date and Time
   - Vaccine Product / Inventory
   - Injection Site
   - Route
   - Administered By
   - On Behalf of (Clinician)
   - Notes

2. To begin editing the details of the **VACCINE ADMINISTRATION**, select any **PENCIL ICON** to the right of a field.
The VACCINE ADMINISTRATION details will now appear as editable fields. As you edit fields, they will highlight yellow to indicate that you’ve made a change.

1. Edit any of the following fields to the correct information:
   - Date / Time of Vaccination
   - Injection Site
   - Route
   - Administered By
   - On Behalf of (Clinician)
   - Notes

2. Do not edit any of the following fields:
   - Account Name
   - Cancellation Reason
   - Appointment Date / Time
   - Case Owner

3. Click SAVE

NOTE: You cannot remove Dosage, Injection Site, or Route, nor can you uncheck the Adverse Reaction Consent checkbox on administered appointments. If you need to remove a vaccine administration, see the Remove Vaccine Administration section of this user guide.
To edit the **VACCINE INVENTORY** field of the **VACCINE ADMINISTRATION**, you must select the **CHANGE VACCINE INVENTORY** button.

**Tips**
Review the next section of this User Guide for instructions on how to use the **CHANGE RECIPIENT** button.
Step 7 of 8: Select an Updated Vaccine Inventory

A pop-up window will appear inviting you to Change Vaccine Inventory.

1. Click the **SEARCH VACCINE INVENTORIES** field, which will populate a list of available inventories for your location.

2. Locate and click the correct inventory, or type the name of the inventory to quickly find it.
   
   **Note:** You cannot change the Vaccine Inventory from a two-dose vaccine product to a single-dose vaccine product if you are editing a **SECOND DOSE** vaccine administration.

3. Click **FINISH**

---

**Tips**

Although **VACCINE PRODUCT** is not an editable field, changing the **VACCINE INVENTORY** to an inventory of a different product will automatically update the **VACCINE PRODUCT** field.
At any point, you can review the history of changes made to the Vaccine Administration details.

1. From the Appointment Record, click the RELATED tab
2. View CASE HISTORY to see the date, time, user, old value, and new value for each individual field that was changed
Post-Vaccine Administration Reminders
Post Vaccine Administration Reminders

After recipients received a first dose, they will receive **TWO (2) SECOND DOSAGE REMINDER NOTIFICATIONS** of the timing requirements for the second dosage:

1. The first reminder is **24 HOURS** after

2. The second is **ONE WEEK AFTER** the first dosage is administered.

Booster dose notifications are also sent to recipients, older than 15 years old, 2 weeks before they become eligible. Notifications are sent by email, text message, or both depending on the choices the recipient made at registration.

**Note:** Second dosage reminder notifications are only sent to recipients who have set their preferred method of contact to text, email, or both, regardless of whether the recipient is a minor.
## Booster Dose Notifications Sent By Email

<table>
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<th>J&amp;J</th>
<th>Pfizer</th>
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<td>**YOU HAVE A SPOT.</td>
<td>TAKE YOUR SHOT.**</td>
<td>**YOU HAVE A SPOT.</td>
</tr>
<tr>
<td>Anyone 18 and older who received the Moderna COVID-19 vaccination can now receive a booster vaccination at least 6 months after receiving their second dose.</td>
<td>The Food and Drug Administration (FDA) has authorized and the Centers for Disease Control and Prevention (CDC) now recommends that individuals can receive a COVID-19 booster vaccination of their Johnson &amp; Johnson vaccine 2 months following their initial dose.</td>
<td>Anyone 18 and older who received the Pfizer COVID-19 vaccination can now receive a booster vaccination at least 6 months after receiving their second dose.</td>
</tr>
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The Moderna booster is a smaller dose than what is given in the first two shots. Be sure to let your provider know you want the booster.

Booster shots strengthen and extend protection against infection, severe illness, hospitalization and death from COVID-19. They are a part of the COVID-19 vaccination effort that has saved thousands of lives with tested, safe and effective vaccines.

**Booster vaccinations are now available to all North Carolinians 18 and older.** Go to MySpot.nc.gov/booster to find out more about the COVID-19 boosters and to find a vaccine location near you. You do not need to get your booster dose at the same location you received prior doses. Your vaccine provider will ask questions about your previous COVID-19 vaccinations to make sure you get the right booster at the right time. Please have your vaccine information with you.

Mandy Cohen, MD, MPH  
Secretary, NC Department of Health and Human Services

The Food and Drug Administration (FDA) has authorized and the Centers for Disease Control and Prevention (CDC) now recommends that individuals can receive a COVID-19 booster vaccination of their Johnson & Johnson vaccine 2 months following their initial dose.

Additionally, individuals are now able to receive any brand of COVID-19 vaccine for their booster shot. Some people may have a preference for the vaccine type that they originally received and others may prefer to get a different booster. Limited preliminary evidence suggests that booster doses of one of the two mRNA vaccines—Moderna or Pfizer-BioNTech—more effectively raise antibody levels than a booster dose of the Johnson & Johnson vaccine. NC DHHS encourages you to speak with a doctor, nurse or pharmacist if you have questions about what booster is right for you.

Booster shots strengthen and extend protection against infection, severe illness, hospitalization and death from COVID-19. They are a part of the COVID-19 vaccination effort that has saved thousands of lives with tested, safe and effective vaccines.

Go to https://myster.c.gov/booster) to find out more about the COVID-19 boosters and to find a vaccine location near you.

You do not need to get your booster dose at the same location you received prior doses. Your vaccine provider will ask questions about your previous COVID-19 vaccinations to make sure you get the right booster at the right time. Please have your vaccine information with you.

Mandy Cohen, MD, MPH  
Secretary, NC Department of Health and Human Services
NC DHHS notice: your vaccine information is available on the NC COVID-19 Vaccine Portal. No action is needed.
To view, visit: https://covid19.ncdhhs.gov/access-vaccine-portal (reply STOP to unsubscribe or HELP for help).
Generating the Vaccination Information PDF for a Recipient
Step 1 of 2: Search for the Recipient

1. Click the **RECIPIENT TAB**

2. Type your **RECIPIENT’S NAME** in the **SEARCH BAR** and PRESS ENTER

3. Click your **RECIPIENT’S NAME** from the list to open the recipient’s account
Step 2 of 2: Generate Vaccine Information PDF

You may now generate a PDF document of a recipient’s vaccination information that can be downloaded or printed. This PDF document can be generated for any recipient in CVMS.

1. Select the GENERATE VACCINE INFORMATION PDF button

2. Print or securely send the document to the recipient

**NOTE:** If a recipient has received no vaccinations and you click the GENERATE VACCINE INFORMATION PDF button, there will be an error. If a recipient has received more than 2 doses, information for all doses will appear on the PDF document.

**Tips**
To print the Vaccination Information PDF document in Spanish, the recipient will have to log into the COVID-19 Vaccine Portal, set the language to Spanish, and then generate the PDF document for themselves. The PDF document cannot be generated in Spanish from the CVMS Provider Portal.
Other Operations Available to Edit a Recipient or an Administration Record Post-Vaccination
Edit a Recipient Registration Record Details
In some instances, a recipient may need their information on the COVID-19 Vaccine Registration form edited. To do so, navigate to the Recipient Tab.
Step 2 of 4: Search for the Recipient

1. Enter the recipient’s NAME (first name and last name) in the search bar for the recipient who needs their COVID-19 Vaccine Registration form updated

2. To help narrow results, enter the recipient’s DATE OF BIRTH or EMAIL ADDRESS in the appropriate field

Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself

3. Click SEARCH

4. Click on the desired recipient from your search results

Tips

Only select a recipient record that populates in the RECIPIENTS WITHIN CVMS section of your search results
Step 3 of 4: Edit the Recipient’s Information

1. From the recipient’s Person Account, click the pencil icon next to the field you need to edit.
2. Make any necessary changes (fields where you’ve made an unsaved change will be highlighted in YELLOW).
3. Click SAVE.

Tips
If you make an update that you did not mean to make, you can select the UNDO arrow to revert to the original value or click CANCEL.

The Vaccination Log at the top of the page cannot be edited. It is a summary of the doses administered to the recipient. See the EDIT VACCINE ADMINISTRATION DETAILS section of this user guide for more information.
The updated information will now show as part of the recipient’s record.
Review the information that you entered to ensure it is correct.

**Tips**
Any changes you make to a recipient’s record will also be reflected when the recipient logs in to the COVID-19 Vaccine Portal.
Change the Recipient of a Vaccine Administration
Step 1 of 5: Navigate to Recipient Tab

When a HEALTHCARE PROVIDER enters Vaccine Administration details for the wrong RECIPIENT, the Healthcare Provider must change the recipient for the entered Vaccine Administration details.

To begin, navigate to the RECIPIENT tab.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Healthcare Providers can only change Vaccine Administration recipient for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.
Step 2 of 5: Locate Recipient

Clicking on the **RECIPIENT TAB** takes you to a screen to search all recipients in CVMS.

1. Type in the incorrect recipient's name in the search box
2. Click **SEARCH**
3. Select the recipient's name
Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

1. Click on the **RELATED** tab under the recipient's name to view appointment information.
2. Select the appointment record that needs to be changed to another recipient (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED**, **DOSE 2 ADMINISTERED**, or **ADDITIONAL DOSE / BOOSTER ADMINISTERED**).
Step 4 of 5: Change Recipient

Selecting the appointment record takes you to the appointment details screen. Click **CHANGE RECIPIENT** in the top right corner to transfer the **VACCINE ADMINISTRATION** details to the correct recipient.
Step 5 of 5: Locate Correct Recipient

A Change Recipient pop-up box will appear.

1. Search for the correct recipient in the **UPDATED CONTACT NAME** field and click their name.
2. Click **FINISH**
3. A Success Confirmation pop-up should appear at the top of the screen.

**Tips**

The status of the incorrect recipient will be reverted to their previous status, (e.g., 'Dose 1 Administered' will revert to 'Registered').

The correct recipient's status will be updated to reflect the administered vaccine (e.g., updated from 'Registered' to 'Dose 1 Administered').
Remove Vaccine Administration
Step 1 of 5: Navigate to Recipient Tab

When a HEALTHCARE PROVIDER enters Vaccine Administration details erroneously and the Vaccine Administration needs to be completely cleared from CVMS, the Healthcare Provider must REMOVE the Vaccine Administration details.

To begin, navigate to the RECIPIENT tab.

Audience
Healthcare Location Manager

Tips
Healthcare Location Managers can only remove Vaccine Administration for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.
Step 2 of 5: Locate Recipient

Clicking on the **RECIPIENT** **TAB** takes you to a screen to search all recipients in CVMS.

1. Type in the name of the recipient that has the incorrect vaccination administration in the search box.
2. Click **SEARCH**
3. Select the recipient's name.
Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

1. Click on the **RELATED** tab under the recipient's name to view appointment information.
2. Select the appointment record that needs to be completely removed from CVMS (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED**, **DOSE 2 ADMINISTERED**, or **ADDITIONAL DOSE / BOOSTER ADMINISTERED**).
Step 4 of 5: Remove Administration from Recipient

Selecting the appointment record takes you to the appointment details screen. Click **REMOVE THIS ADMINISTRATION** in the top right corner to clear the record of the **VACCINE ADMINISTRATION** from CVMS.
Step 5 of 5: Confirm Vaccine Administration Removal

A pop-up box will appear.

1. Verify the details of the vaccine administration that you intend to remove
2. Select a required **REMOVAL REASON** from the drop-down list
3. Enter an optional **REMOVAL DESCRIPTION** to elaborate on the vaccine administration removal
4. Click **CONFIRM**
5. When the final confirmation screen appears, select **SAVE**
6. The vaccine administration data will be removed from the recipient’s record, and the vaccine inventory record will be credited by one available dose

**Tips**
The status of the recipient will be reverted to their previous status, (e.g., ‘Dose 1 Administered’ will revert to ‘Dose 1 Cancelled’).
Enter an Additional Dose / Booster Administration
Additional Dose / Booster Considerations

When selecting which dose the recipient is receiving, you have the option of choosing **ADDITIONAL DOSE / BOOSTER**. The **ADDITIONAL DOSE / BOOSTER** selection should be used when a recipient is getting any administration of a COVID-19 vaccine **AFTER THE SECOND DOSE**. If you select **ADDITIONAL DOSE / BOOSTER** for a recipient who does not have a Dose 2 recorded in CVMS, you will see a warning message appear at the top of the screen.

A recipient may receive a vaccine administration of **DOSE 1, DOSE 2**, and multiple **ADDITIONAL DOSE** administrations until there are **SIX** total administrations. Once they have received six total administrations, the recipient will not be able to book another appointment or have another vaccine administration logged into CVMS.

**Tips**

Please review the CDC website at [https://www.cdc.gov/coronavirus](https://www.cdc.gov/coronavirus) for the most up-to-date information regarding the guidance for additional doses.

For more detailed clinical guidance, please visit: [https://www.cdc.gov/vaccines/covid-19/clinical-considerations/covid-19-vaccines-us.html](https://www.cdc.gov/vaccines/covid-19/clinical-considerations/covid-19-vaccines-us.html)
Janssen (J&J) Additional Dose / Booster

Once appropriate guidance is provided by the CDC and NCDHHS for administering Janssen (J&J) additional dose/boosters, CVMS will allow the additional dose/booster administration to be recorded. A message will now display on the Vaccine Administration screen under VACCINE DETAILS directing providers to enter the administration as DOSE 2/SECOND DOSE until further notice.

*Janssen (J&J) Boosters should temporarily be entered as a Dose 2/Second Dose until further enhancements are made to CVMS.*
Modernma Additional Dose / Booster

Moderna’s booster vaccine is 50% of the regular dose. If the VACCINE PRODUCT selected is Moderna, CVMS will generate a VACCINE DOSE AMOUNT box where a provider must select whether a full dose or a half dose was administered.

**Note:** Recipients who received Moderna and are moderately to severely immunocompromised are recommended to receive a full dose of the Moderna vaccine as an additional dose to their original two dose series.

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**Audience:**
- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager
Enter Dose Administration Records Out of Order
Out of Order Dose Considerations

On rare occasions, a recipient will already have the vaccine administration details logged for a second dose before the first dose has been entered into CVMS. When that occurs, the vaccinating provider can retroactively log the first dose if the first dose was administered by the same provider location.

To log the DOSE 1 vaccine administration details:
1. Use the APPOINTMENT WALK-IN TOOL to book an appointment for the recipient
2. Begin logging vaccine administration details, and select the DOSE 1 button (the DOSE 2 button will be grayed out, and DOSE 2 details will appear at the top of the screen)
3. Correct the date and time to the date of administration
4. Verify the other vaccine administration details, and submit the administration

Tips
This same process may be used to log a DOSE 2 if an ADDITIONAL DOSE / BOOSTER has already been logged.

Do NOT enter in vaccine administration details for a vaccine dose that your location did not administer.
Cancel an Existing Appointment
The process to cancel an existing appointment for a recipient begins on the **APPOINTMENTS** tab.

1. Navigate to the **APPOINTMENTS** tab

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**Tips**

Providers using CVMS Direct (Electronic Health Record system integration with CVMS) may also notice cancelled appointments appearing in CVMS. Those appointments are created during the integration process and will be automatically cancelled and marked as **DUPLICATE** since they are a replica of the scheduled appointment.
Step 2 of 5: Search for the recipient

1. You can use the **SEARCH APPOINTMENTS** field to search for the recipient by **NAME**

2. Set the **FROM** and **TO** fields to include the date of the appointment that needs to be cancelled (the field will default to the current date)

3. Click **SEARCH**
Step 3 of 5: Locate the Appointment to Cancel

After clicking search, the existing **APPOINTMENTS** will populate underneath the Appointments List View.

1. Locate the correct **RECIPIENT** who needs an appointment cancelled
2. Verify the recipient’s identity
3. Select the checkbox to the left of the recipient’s name
4. Select the **CANCEL APPOINTMENT** button
Step 4 of 5: Cancel the Appointment

Selecting the **CANCEL APPOINTMENT** button will initiate a pop-up window to appear on the screen.

1. Input a **CANCELLATION REASON** from the drop-down menu (you may optionally add a cancellation description in the free text field)
2. Select the **CANCEL APPOINTMENT** button
Step 5 of 5: Confirm the Appointment is Cancelled

The recipient should no longer have their appointment booked. If the recipient’s appointment was for today, the recipient should no longer appear on the TODAY’S APPOINTMENTS tool.
Automated Cancellation

There are a few scenarios that may result in an automatic cancellation:

→ if a recipient is manually added to **TODAY’S APPOINTMENTS** but does not complete their appointment within 72 hours, the appointment will be **AUTOMATICALLY** cancelled, and their Dose Status will update to **DOSE 1 CANCELLED, DOSE 2 CANCELLED, or ADDITIONAL DOSE / BOOSTER CANCELLED**.

→ if a recipient creates multiple scheduled appointments (for example at different locations in hopes of being vaccinated as quickly as possible), all the remaining appointments will be automatically cancelled as soon as one of the appointments is changed to a **DOSE 1 ADMINISTERED, DOSE 2 ADMINISTERED, OR ADDITIONAL DOSE / BOOSTER ADMINISTERED** status.
To view a record of a recipient’s appointment history, navigate to the Recipient tab, locate the recipient’s record, and select RELATED tab. The recipient’s appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a CANCELLATION REASON if applicable.

Tips
If an appointment was cancelled automatically, the CANCELLED BY SYSTEM VIA BATCH JOB field will be checked.
Mark a Recipient as Deceased
Step 1 of 5: Navigate to the Recipients Tab

Providers can mark a recipient as deceased within CVMS to ensure that no further system-generated communications are sent to the deceased recipient’s email address.

1. Navigate to the **RECIPIENT** tab
Step 2 of 5: Search for the Recipient

1. Enter the deceased recipient’s NAME (first name and last name) in the search bar
2. To help narrow results, enter the recipient’s DATE OF BIRTH or EMAIL ADDRESS in the appropriate field

*Note: The Date of Birth field can only be used if there is a name or email address in the search bar, and cannot be used by itself*

3. Click SEARCH
4. Click the name of the DECEASED RECIPIENT
1. Click the pencil icon next to the **MARK INACTIVE** field
Step 4 of 5: Mark Recipient as Deceased

1. Check the box under the **MARK INACTIVE** field
2. From the drop-down menu for **INACTIVE REASON**, select **DECEASED**

**Note**: If you select **BAD DATA** or **DUPLICATE** you will receive an error message.

**Tips**
If a recipient record needs to be marked inactive because it is either bad data or a duplicate of another record, please submit a request through the **CVMS HELP DESK PORTAL** at [https://ncgov.servicenowservices.com/csm_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).
Step 5 of 5: Confirm Update

1. After updating the recipient’s record to **DECEASED**, a pop-up message appears asking you to confirm that the information has been validated.

2. On the Recipient tab, the deceased recipient will now show **DECEASED** in the **INACTIVE REASON** column.
Review Recipient Vaccination Report
Step 1 of 2: Navigate to the Reports Tab

Healthcare Location Managers may also run a report in the CVMS Provider Portal that shows a roll-up of recipient vaccination information at your location. Vaccine administration data can be reviewed directly in CVMS or can be exported as a .CSV file to Microsoft Excel.

1. Navigate to the REPORTS tab
2. Select ALL REPORTS
3. Click RECIPIENT VACCINATION REPORT

Tips
Step 2 of 2: Review Recipient Vaccination Report

1. Sort, filter, or review the report as needed
2. Click **EXPORT** if you would like to download the data into a spreadsheet
Checking-in a Recipient at the Front-desk

(Locations that enabled the scheduling feature in CVMS)

For information on how to enable the scheduling feature in CVMS, please refer to the Step 9 – Invite Recipients to Self-Schedule Their Appointments User Guide at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers
Check-In Recipients with Scheduled Appointments
There are three methods to begin the VACCINE ADMINISTRATION process. The provider who will administer the COVID-19 vaccine can select the Recipient under TODAY’S APPOINTMENTS on the HOME PAGE which will begin the VACCINE ADMINISTRATION process.

1. Click on the RECIPIENT’S NAME to begin the Vaccine Administration
2. Begin VACCINE ADMINISTRATION
Method 2: Enter the Appointment Confirmation Number

Alternatively, you can begin the VACCINE ADMINISTRATION PROCESS by entering the Recipient’s APPOINTMENT CONFIRMATION NUMBER that they received after scheduling their appointment online using the scheduling feature in CVMS.

1. Enter the APPOINTMENT CONFIRMATION NUMBER under the Recipient Check In tool
2. Click GO to begin the VACCINE ADMINISTRATION
Method 3: Check In the Recipient in the Appointment Tab

Lastly, the VACCINE ADMINISTRATION process can begin from the APPOINTMENTS TAB.

1. Navigate to the APPOINTMENTS TAB
2. Find the CORRECT APPOINTMENT BOOKING for the Recipient you would like to begin the Vaccine Administration for
3. Click the drop-down arrow to the right of their name
4. Select CHECK IN to begin VACCINE ADMINISTRATION
Schedule a First Dose Appointment
Step 1 of 8: Search for the Recipient Record

As a provider, you can schedule a first dose appointment using the scheduling feature in CVMS. To do so, you must first confirm that the recipient is registered in CVMS. Once confirmed, you can begin the scheduling process from the CVMS Provider Portal.

1. To begin, click the **RECIPIENT** tab
2. **SEARCH FOR THE RECIPIENT** with their name and/or date of birth
3. Confirm their Recipient Dose Status is **REGISTERED**
4. If the recipient is registered, **open the recipient record**

Tips
For guidance on how to confirm if a recipient is registered in CVMS (and how to register them if they are not), please reference the **Recipient Point of Care** section of this user guide.
Step 2 of 8: Begin Scheduling the First Dose Appointment

Once you confirm that you opened the correct Recipient record, make sure that the recipient's preferred method of contact is up to date, or the recipient will not receive an appointment confirmation notification.

1. Click the **SCHEDULE FIRST DOSE APPOINTMENT** button in the upper right corner.
Step 3 of 8: Click Schedule First Dose

Continue into the scheduling feature in CVMS by clicking, **Schedule First Dose**.
Step 4 of 8: Search for Location and click, See Availability

A new tab will open and direct you to select a location.
1. Search using an **ADDRESS OR ZIP CODE**
2. Select a location and click **SEE AVAILABILITY**
Step 5 of 8: Select an Appointment Date and Time

You will be prompted to select a date and time for the selected location. Only days with available appointments will appear enabled on the calendar.

1. Select an AVAILABLE DATE
2. Select an AVAILABLE APPOINTMENT TIME

Tips
If you need to change the location of the appointment, click the Change button at the top of the page.
Step 6 of 8: Confirm Appointment Details

Review the appointment details before moving forward. If you need to select a new date and time, you can click the X button to select a new appointment for the same location.

1. Click **CONTINUE**

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**Tips**

If you need to change the location of the appointment, this is the last page where you will be able to do so.

Click the Change button at the top of the page.
Step 7 of 8: Click Complete Appointment

The recipient’s details are already saved from their registration.

1. Scroll down, click **COMPLETE APPOINTMENT**
Step 8 of 8: Review Appointment Confirmation

Once the appointment is complete, the recipient will receive an appointment confirmation via email and / or text/SMS if they provided contact information. It is important that the recipient note their appointment confirmation code and details if they did not provide a preferred method of contact.

1. Review the **APPOINTMENT CONFIRMATION** details
Schedule a Second Dose Appointment
Method 1 - Step 1 of 3: Book Second Dose at Time of First Dose Administration

If a RECIPIENT used the scheduling feature in CVMS to book their first appointment and received a vaccine product that requires a second dose, the final page of the VACCINE ADMINISTRATION process will display a button labeled BOOK SECOND DOSE. Second dose appointments use the same AVAILABILITY SCHEDULE as first dose appointments.

1. To begin, click the BOOK SECOND DOSE button

Tips
Healthcare Providers will only see this option for recipients who booked their first dose appointment through the scheduling feature in CVMS.
Method 2 - Step 1 of 3: Book Second Dose After First Dose Administration

You may choose to book a second dose appointment after first dose vaccine administration.

1. To begin, navigate to the LOCATIONS tab
2. Find the DOSE 1 ADMINISTERED appointment
3. Open the menu and click SCHEDULE SECOND DOSE

Tips
Schedule the SECOND DOSE APPOINTMENT while the recipient is on-site to confirm that you have availability at the planned appointment time.
Step 2 of 3: Select a Date and Time

The scheduling feature in CVMS will appear in a new tab and will default to the same location as the first dose appointment. If the recipient needs to change the location, the new provider location must book the appointment for the recipient.

1. Select a date for the second dose

   **NOTE**: The first available date for a second dose is based upon the product the recipient received for their first dose (21 days or 28 days). For example, if a recipient was vaccinated with Pfizer with a recommended 21-day interval for their second dose, the earliest possible appointment for their second dose would be 21 days after their first dose. However, the recipient should be scheduled as close to the recommended interval as possible.

2. Select an available time slot for the second dose

   ![Schedule Dose 2](image)

   **Tips**
   You will not be able to schedule an appointment too early. The scheduling feature in CVMS will show you the correct timeline for the vaccine your recipient received.
Step 3 of 3: Confirm Appointment

Now, you will complete the 2nd dose appointment booking.

1. Click COMPLETE APPOINTMENT
2. Review the details of the scheduled appointment
3. The recipient will only receive a reminder notification if they provided an email and/or phone number and agreed to reminders when they scheduled their 1st dose appointment.

Tips
You will not be able to change the location of the appointment through the appointment confirmation email.

You must cancel the appointment and the new location must schedule the appointment for the recipient.

The confirmation code for the 2nd dose appointment is the same as the confirmation code for the 1st dose appointment.
Search Scheduled Appointments
Step 1 of 5: Navigate to Appointments Tab

Periodically, you may want to verify how many appointments have been scheduled for a specific day or period. Searching for upcoming appointments can be done from the Appointments Tab.

1. To begin, navigate to the **APPOINTMENTS** tab.
Step 2 of 5: Review and Plan Appointments for the Day

You will first need to enter a date range.

1. Enter the specific dates in the two fields **FROM** and **TO**
2. Click **SEARCH**

**Tips**

The number of appointments will show at the top left of the page.
Step 3 of 5: Search by Name, Location, or Vaccine Status

In the **SEARCH APPOINTMENT** field, you can search including recipient name, location name, or vaccine status. If multiple locations are available, you can enter the location name. Vaccine statuses include **DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) SCHEDULED**, or **DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) ADMINISTERED**.

1. Enter the keyword in the **SEARCH APPOINTMENTS** field
2. Click **SEARCH**
3. Click **RESET** to restore the standard view
Step 4 of 5: Search by Using Recipient’s Confirmation Number

For locations that enable the scheduling feature in CVMS, recipients that book an appointment will be sent a unique confirmation code for their appointment. You can search for a specific recipient’s appointment using this confirmation code.

1. Enter the confirmation code in the field labeled SEARCH CONFIRMATION NUMBER field
2. Click SEARCH
Step 5 of 5: Search by Appointment Status

Another helpful view is Appointment Status over to the right. Options include:

- **New** – recipients with an upcoming appointment
- **Closed** – scheduled recipients that completed their appointment
- **Canceled** – appointment canceled either by the recipient or by the provider

1. Select STATUS
2. Click SEARCH

**Tips**

Search using the **NEW** status filter to quickly see which appointments were booked overnight.

Recipients can cancel their appointment in CVMS directly through a link included in the confirmation email or the text message.
Cancel Scheduled Appointments
If a scheduled appointment needs to be cancelled, you can cancel it and notify the recipient of the reason for cancellation.

To begin, navigate to the **APPOINTMENTS** tab.
Step 2 of 5: Search for the Recipient by Name, Appointment Date, Confirmation Code, and/or Vaccine Status

You will first need to find the appointment you wish to cancel. You can search using the recipient’s name or confirmation code as well as filter by the date and/or status.

1. Search for the appointment(s) you need to cancel

![Screenshot of NCDHHS CVMS Provider Portal with a red box highlighting the search fields for appointment and status filters.]
Step 3 of 5: Cancel Up to 20 Appointments

You can cancel up to 20 appointments at a time.

1. Click the checkbox at left of the appointments you wish to cancel (up to 20)
2. Click the CANCEL APPOINTMENT button in the upper right.

Tips
The ability to cancel 20 appointments at a time can be particularly helpful if you have a capacity issue and need to quickly cancel some appointments for the day that cannot be reassigned.
Step 4 of 5: Provide Cancellation Reason and Cancel Appointment

If the appointment was made through the scheduling feature in CVMS and the Recipient opted “in” for receiving text and/or email notifications, they will be notified of the cancellation.

1. Input a reason for cancelling the appointment(s) from the drop-down menu (you may optionally add a cancellation description in the free text field)
2. Click the CANCEL APPOINTMENT button to confirm the cancellation

**Note:** If the recipient did not sign up for text and/or email notifications as their preferred method of contact, they will not know that the appointment has been cancelled.

**Tips**
You may want to follow up with a call to the recipient even if they have signed up to receive notifications just to make sure they saw the cancellation.
To view a record of a Recipient’s appointment history, navigate to the Recipient tab, locate the Recipient’s record, and select RELATED tab. The Recipient’s appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a CANCELLATION REASON if applicable.

Tips
You may need to reschedule the appointment if the recipient has not already received their vaccination. If they did not sign up for the text and/or email notifications, they will not receive a booking confirmation.
There are a few scenarios that may result in an automatic cancellation:

1. If a Recipient appears in **TODAY’S APPOINTMENTS** (either through the Appointment Walk-In process or due to a scheduled appointment) but does not complete their appointment within 72 hours, the appointment will be **AUTOMATICALLY** cancelled, and their Dose Status will update to **DOSE 1 (or 2 or ADDITIONAL DOSE / BOOSTER) CANCELLED**.

2. If a Recipient creates multiple appointments (for example at different locations in hopes of being vaccinated as quickly as possible), all the remaining appointments will be automatically cancelled as soon as one of the appointments is changed to an **ADMINISTERED** status.

3. Providers using CVMS Direct (Electronic Health Record system integration with CVMS) may also notice cancelled appointments appearing in the system. Those appointments are created during the integration process and will be automatically cancelled and marked as **DUPLICATE** as they are a replica of the scheduled appointment.
Appendix
Key Items:

**Hyperlinks** appear as light blue and will provide additional information or navigation.

* Asterisks are used to denote required information.

🔧 A Toggle can be clicked to see selectable options.

📝 A Pen can be clicked to make edits to the field.

Previous  Next  
Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.

❌ 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 older versions of Edge browsers are not compatible with CVMS.
<table>
<thead>
<tr>
<th>Version</th>
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<th>Changes Made</th>
<th>Author</th>
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<tr>
<td>1</td>
<td>12/1/2020</td>
<td>• Initial document</td>
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| 2       | 12/18/2020     | • Added Create Recipient, Register Recipient sections, updated Process Flow, added Generic Employer List, eligibility criteria  
• Added Patient Verification and Screening page, Removed mention of Adverse Reaction Annotation, clarified On Behalf Of (Clinician), added Schedule Follow-up Page  
• Updated Process for recipients that are not Eligible yet / Not Approved                                                                                                                                                                                                                                                                                                                                                                                     | Steve DiGangi                |
| 3       | 1/15/2021      | • Updated instructions for Creating Recipient  
• Updated Screenshots  
• Updated instructions for Appointment Booking (select a location)  
• Updated Understanding How Recipient Eligibility Status is Determined Section  
• Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information  
• Added “What to do if a Recipient received their first dose through a LTC/Pharmacy” section  
• Added Cancelling an Existing Appointment Section  
• Updated screenshots to include updated branding, Appointments tab, Second Dose warning label, and new Vaccine Route  
• Included information about recipients who may receive a first dose outside of CVMS                                                                                                                                                                                                                                                                                                                                                   | Steve DiGangi, Courtney Seward |
| 4       | 1/26/2021      | • Added in Updated Priority Group Tiering Logic  
• Corrected Priority Tiering Screenshots  
• Added screenshots to include Location Switcher button  
• Added Location Switcher button explanation section  
• Added new section: Edit Vaccine Administration Details After Submission  
• Added new section: Edit Vaccine Administration Recipient                                                                                                                                                                                                                                                                                                                                                                              | Steve DiGangi                |
| 5       | 2/9/2021       | • Added new section on Editing Recipient Registration Information  
• Updated section titles in TOC                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Steve DiGangi                |
| 6       | 3/4/2021       | • Added information about single-dose products  
• Updated eligibility branding to Vaccine Group  
• Removed priority tiering logic and eligibility visibility  
• Removed eligibility branding to replace with Vaccine Group  
• Updated screenshots to correct branding (DOB & Middle name fields, vaccine group)                                                                                                                                                                                                                                                                                                                                                     | Steve DiGangi                |
<table>
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| 7       | 3/10/2021      | • Updated Overview slide  
• Updated branding to include Recipient Check-In tool  
• Updated Cancelling an Existing Appointment section  
• Added Appointment Confirmation Number usage  
• Added Book Second Dose Appointment section  
• Created new section to cover scheduled appointments | Steve DiGangi |
| 8       | 4/16/2021      | • Removed explanations on 2nd dose appointment cancellations  
• Removed Eligibility definition  
• Updated branding to remove Vaccine Group and add date/product of vaccination  
• Added search by email address in Recipient tab  
• Added Cancellation changes for 24-hour automatic cancel after a no-show, automatic cancellation if there are duplicate appointments, and cancel reason picklist  
• Added new section on marking recipient deceased  
• Removed slide concerning inactive Vaccine Groups  
• Updated Cancellation branding with picklist  
• Removed guidance to enter recipient demographic information from 1st dose appointment booking | Steve DiGangi |
| 9       | 5/05/2021      | • Updated branding to change "Long term care/federal pharmacy programs" fields  
• Added Generate PDF button | Kaitlin Gates |
| 10      | 5/16/2021      | • Updated Cancel Appointment section to show if an appointment was cancelled automatically  
• Added updated QR code to PDF | Steve DiGangi |
| 11      | 6/13/2021      | • Updated screenshot of registration form  
• Updated auto-cancellation rule to reflect 72-hour cancellation after no-show appointments | Steve DiGangi |
| 12      | 6/30/2021      | • Added Address Line 2 field  
• Updated branding of screenshots  
• Added Remove Vaccine Administration section  
• Added note about being unable to blank-out information on a vaccine administration in an effort to remove the record | Steve DiGangi |
## User Guide Change Log (3 on 3)

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| 13      | 07/30/2021     | • Consolidated user guides and updated links  
• Rewrote user guide overview  
• Added ability to book, administer, cancel, and view 3rd doses (known as Additional Dose on the Vaccine Administration page)  
• Added information on logging Dose 1 administration after Dose 2 has already been logged  
• Removed ‘Proof of Vaccination’ tab as Vaccine Information PDF is now used  
• Added section on Report Vaccine Information | Steve DiGangi |
| 14      | 08/17/2021     | • Added new CDC guidance regarding additional doses | Steve DiGangi |
| 15      | 8/26/2021      | • Updated reason for Vaccine Administration removal | Steve DiGangi |
| 16      | 9/10/2021      | • Updated Appointment Walk-in DOB Format  
• New consent language for Vaccine Administrations  
• Updated language for FDA-Approved Pfizer vaccine  
• Updated Vaccination Log Screenshots and explanation  
• Revised guidance on Additional Doses up to 6 total administrations | Steve DiGangi |
| 17      | 9/20/2021      | • 16, 18, 54-55, 61, 81, 87, 90-91, 93, 100, 133, 143: Updated guidance and screenshots for Additional Dose / Booster  
• 2: Help Desk Hours Updated | Steve DiGangi |
| 18      | 10/20/2021     | • 92, 93 – Added to reflect new J&J and Moderna Additional Dose/Booster updates | Darrell Lee  |
| 19      | 12/17/2021     | • 24, 67 - Additional/Booster Dose notification name validation  
• 40-45: Updated info regarding pharmacy recipients | Kaitlin Gates |
| 20      | 1/11/2022      | • Removed “long term care/federal pharmacy program section” references, for updated recipient tab  
• 40-45: Updated info regarding pharmacy recipients | Kaitlin Gates |
| 21      | 02/07/2022     | • Removed “Exception 2: Recipient Record is Created in CVMS, but Recipient did not Complete Registration”  
• Removed Exception 3: Recipient was Vaccinated by a Chain or Retail Pharmacy”  
• Updated Table of Contents | Niya Nelson  |
| 22      | 2/10/2022      | • Updated guidance for pharmacy recipients on Recipient Tab and on Vaccination Logs | Steve DiGangi |
| 23      | 4/1/2022       | • Added information on 2 character minimum for Recipient’s Name | Kaitlin Gates |