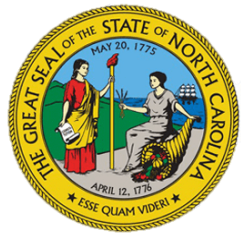


# North Carolina COVID-19 Vaccine Management System (CVMS) **Provider Portal**

## Navigate the CVMS Provider Portal User Guide

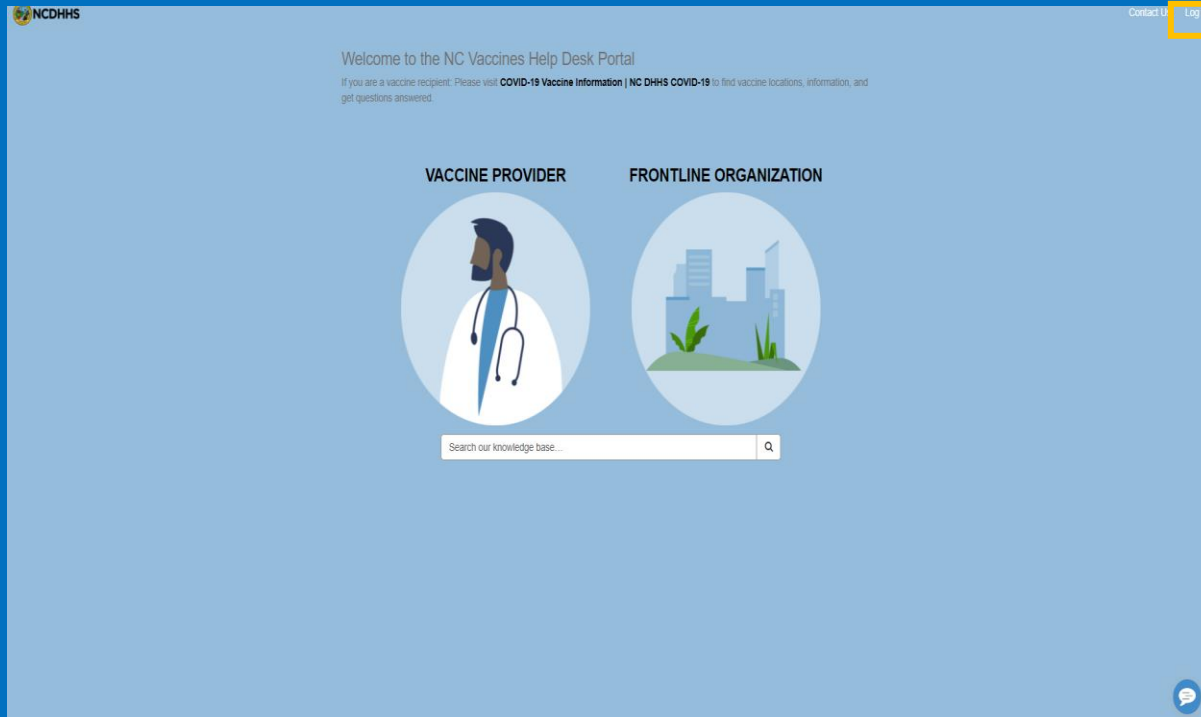
Version 14

November 2022



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**





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: 8 a.m. to 4:45 p.m. ET

\* 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

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# Overview

# Overview

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

The CVMS Provider Portal allows Healthcare Providers in North Carolina to manage the administration of the COVID-19 vaccine. **The CVMS Provider Portal is different than the CVMS Provider Enrollment Portal, where Healthcare Providers enroll in the NC Vaccination Program and maintain their provider agreement.**

When logging in to the CVMS Provider Portal, be sure to have your **NCID USERNAME** and **NCID PASSWORD** available. *If you do not have an NCID username, refer to the Appendix for instructions on how to create one.*

The processes included in this training are for the **Healthcare Provider, Healthcare Location Manager, and Statewide Location Managers** profiles. For **Statewide Location Managers**, all information for the Healthcare Provider profile will apply to the Statewide Location Manager profile. The '**Add A Healthcare Provider Location**' section is only for Statewide Location Managers.

*Additionally, you will need to:*

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Access the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov>

# **Log in to the CVMS Provider Portal**

# How to Log in to CVMS

# Enter NCID Username and NCID Password

1. Navigate to <https://covid-vaccine-provider-portal.ncdhhs.gov>
2. Click on the **NCID** button
3. Enter your **NCID username** and **NCID password**
4. Click **NCID LOGIN**
5. You are logged in to the CVMS Provider Portal

For guidance on obtaining an NCID, refer to this [user guide](#).



## Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

## Tips

Your NCID username must be linked to your profile prior to your first log in. Contact your Healthcare Location Manager to request to be added to one or more locations set up in the CVMS Provider Portal.

# Enter NCID Username and NCID Password

For users of the CVMS Provider Portal, there will be a confidentiality agreement that appears upon first/next log-in.

1. Read the statement
2. Click on **I AGREE**

**Confidentiality Agreement**

CVMS is a system of the State of North Carolina, Department of Health and Human Services (NC DHHS), Division of Public Health (DPH) that enables vaccine management and essential data sharing between vaccine administrators, providers, and public health officials, who have authorized and credentialed access to CVMS (Authorized Users). CVMS contains immunization records and other Protected Health Information (PHI), Personally Identifiable Information (PII), and other information confidential under state and federal law (Confidential Information). At all times, CVMS shall only be accessed by Authorized Users consistent with that user's job duties, responsibilities, and level of authorization, exclusively for legally-permitted uses, and only to the extent strictly necessary (Authorized Access). By clicking "[I Agree]" and proceeding further, you are acknowledging you understand and agree with the preceding statements. Additionally, by clicking "[I Agree]" and proceeding further, you understand and agree to abide by all of the following, including the consequences of any violations of: applicable state and federal confidentiality laws; applicable provisions of the NC DHHS Office of Privacy and Security Manual; and applicable provisions of the North Carolina Department of Information Technology (NCDIT) Statewide Information Security Policies. Unauthorized access or use of CVMS or Confidential Information violates the CVMS Terms of Use and Confidentiality agreement and could expose you or your organization to civil or criminal liability.

Users of this system have no expectation of privacy. This system and equipment are subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in the acquisition, recording, and analysis of all data being communicated, transmitted, processed, or stored in this system by a user. If monitoring reveals possible evidence of criminal activity, such evidence may be provided to Law Enforcement Personnel. Anyone using this system expressly consents to such monitoring.

## Audience

Healthcare Provider

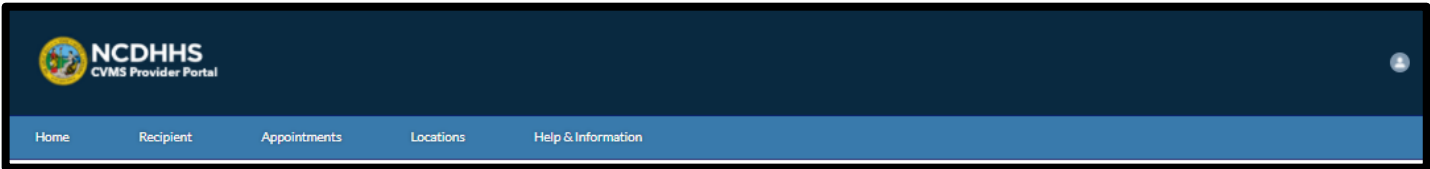
Healthcare Location  
Manager

Statewide Location  
Manager

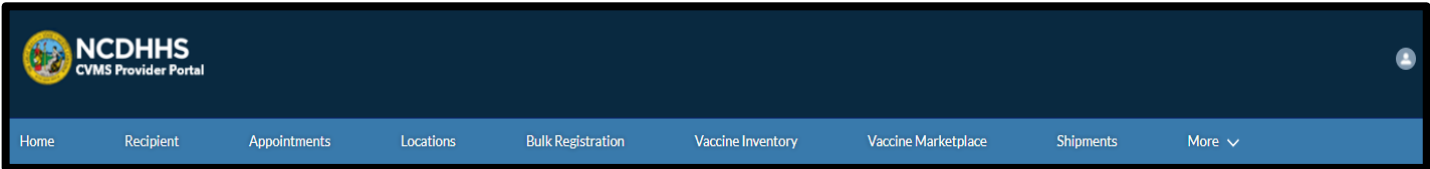
# View the CVMS Provider Portal Tabs

In the CVMS Provider Portal, TABS help you navigate between pages. The TABS you see are based on your user profile: Healthcare Location Manager, Healthcare Provider, or Statewide Location Manager.

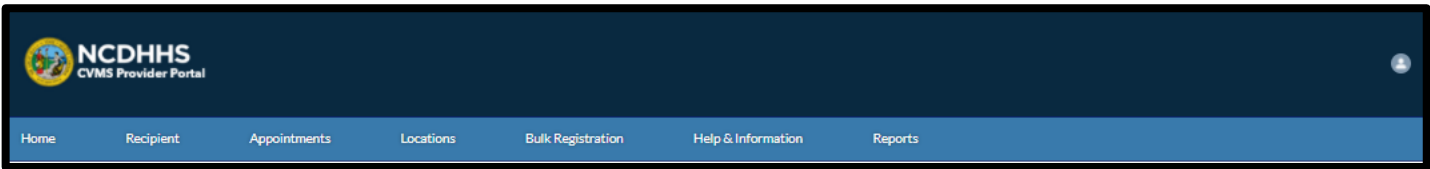
- 1. Users with **Healthcare Provider** profile have the tabs shown below: Home, Recipient, Appointments, Locations, and Help & Information



- 2. Users with **Healthcare Location Manager** profile have the tabs shown below: Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, Organization management, Account Management, Reports, Files, and Help & Information



- 3. Users with **Statewide Location Manager** profile have the tabs shown below: Home, recipient, appointments, locations, bulk registration, help & information, and reports



## Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

# **How to Select Location** **(Users Assigned to Multiple Locations Only)**

# Multi-Location Users Only: Select Location Using ‘Select Location’ Before Proceeding

Users associated with multiple locations can select the location from which they are operating in the CVMS Provider Portal. Upon logging in, the user will have access to their Default location. In this example the default location is TestLoc\_UAT1.

All of the operations in the Portal (e.g., booking appointments, logging vaccine administration) will be attributed to the location that you select.

## Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

## Tips

User associated with multiple locations will have to select a location they are operating from upon logging in to the CVMS Provider Portal.

**If reconnecting after logging out, your location will have been erased and you will need to once again select the location where you are operating from.**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You are currently logged in as TestLoc\_UAT1

Select Location

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

# Logging In to Another Location (if necessary)

At any time, you can switch to another location if you need to support another location by using the **SELECT LOCATION** button.

- 1. Click on the **SELECT LOCATION** button
- 2. Select the appropriate location from the list that appears and click **SUBMIT**
- 3. Please always confirm that your location was switched to the location of your choice by checking the location name displayed at the top of the HOME page

Home Recipient Appointments Locations

You are currently logged in as TestLoc\_UAT1

Select Location

Recipient Check-In

Select the location to proceed:

Location Name	Street	City	State
<input type="radio"/> TestLoc_UAT1	333 aut	townsville	North Carolina
<input checked="" type="radio"/> Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive		
<input type="radio"/> Training Team Vaccine Provider - Site 2	1332 Turner Woods Drive		

Submit Close

Home Recipient Appointments Locations

You are currently logged in as Training Team Vaccine Provider - Site 1

Select Location

Recipient Check-In

Submit Close

## Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

## Tips

Your NCID must be associated to multiple locations to use this functionality. If you are only associated to one location, you will not be able to switch to another location.

If you have a Statewide Location Manager profile, please read **Statewide Location Manager Profile: Add a Healthcare Provider Location** at the end of this User Guide.

# **How to Add and Access Additional Locations**

## **(Users with Statewide Location Manager Profile Only)**

# Step 1 of 3: Click on ADD LOCATION

If you are a Statewide Location Manager, you can add new locations to the list of locations for you to select you are operating from by clicking the **ADD LOCATION** button.

- 1. Click on the **ADD LOCATION** button

Home

Recipient

Appointments

Bulk Registration

Help & Information

You are currently logged in as GreatVaccines Loc1

Select Location

Add Location

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

## Audience

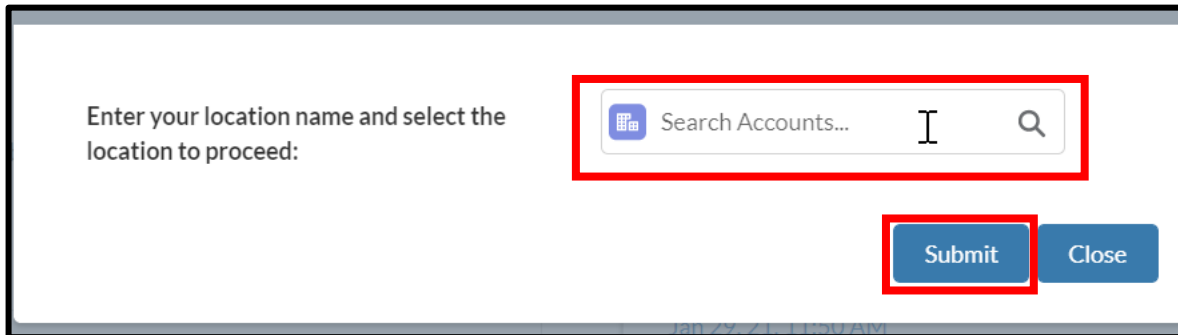
Statewide Location Manager

## Tips

Learn more about it in the Statewide Location Manager Profile - Switch Location Job Aid at <https://covid19.ncdhhs.gov/cvms-statewide-location-manager-profile-switch-location-job-aid/download>.

## Step 2 of 3: Search and select the location

1. Search for the location name you wish to add (type the first 3 letters to display the list of locations that starts with that 3 letters)
2. Click on the name of the location you wish to add in the list of search results
3. Click **SUBMIT**



Enter your location name and select the location to proceed:

### Audience

Statewide Location  
Manager

# Step 3 of 3: Switch to the Newly Added Location

- 1. Click on the **SWITCH LOCATIONS** button
- 2. Select the newly added location you wish to login in as
- 3. Click **SUBMIT**

Audience

Statewide Location  
Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as GreatVaccines Loc1

Select Location

Add Location

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME

DETAILS

CASE NUMBER

LOCATION

Home

Recipient

Appointments

Bulk Registration

Help & Information

You are currently logged in as GreatVaccines Loc1

Switch Locations

Add Location

Select the location to proceed:

Location No.

Street

City

State

Country

Postal Code

TestLoc 1

2111 Blue Ridge Road

Raleigh

North Carolina

USA

27606

TestLoc 2

2111 Blue Ridge Road

Raleigh

North Carolina

USA

27607

Submit

Close

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In


You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

# Navigate the CVMS Provider Portal

# Step 1 of 13: View the CVMS Provider Portal Homepage

On the left side of the Homepage, you see **APPOINTMENT WALK-IN**, and on the right-side **TODAY’S APPOINTMENTS**.

Please note that the Date of Birth will be displayed as follows: Year – Month – Day.



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as Solutions Loc3

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

MM/DD/YYYY

Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

## Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

## Tips

If inactive for 2 hours, the session will expire, and you will have to sign back into the CVMS Provider Portal. **If you are timed out, you will need to start your current action over, as the system will not save where you left off.**

# Step 2 of 13: Recipient Tab Overview

Home

**Recipient**

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produc...	Recipient Dose ...	Date of Admini...	Email	Inactive Reason
------------	-------------	-----------	---------------	--------	-------------------	--------------------	-------------------	-------	-----------------

Recipients from Long Term Care/Federal Pharmacy Programs

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacturer Na...	Vaccination Administration D...
------------	-----------	---------------	--------	-------------	----------------------------	---------------------------------

No results, please search again.

The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal. Your search results will also include in the lower section any records of a recipient who received a COVID-19 vaccine dose from a Federal Long-Term Care Facility Program partner (e.g., CVMS, Walgreens) or from a Federal Retail Pharmacy partner (e.g., CVS, Walgreens).

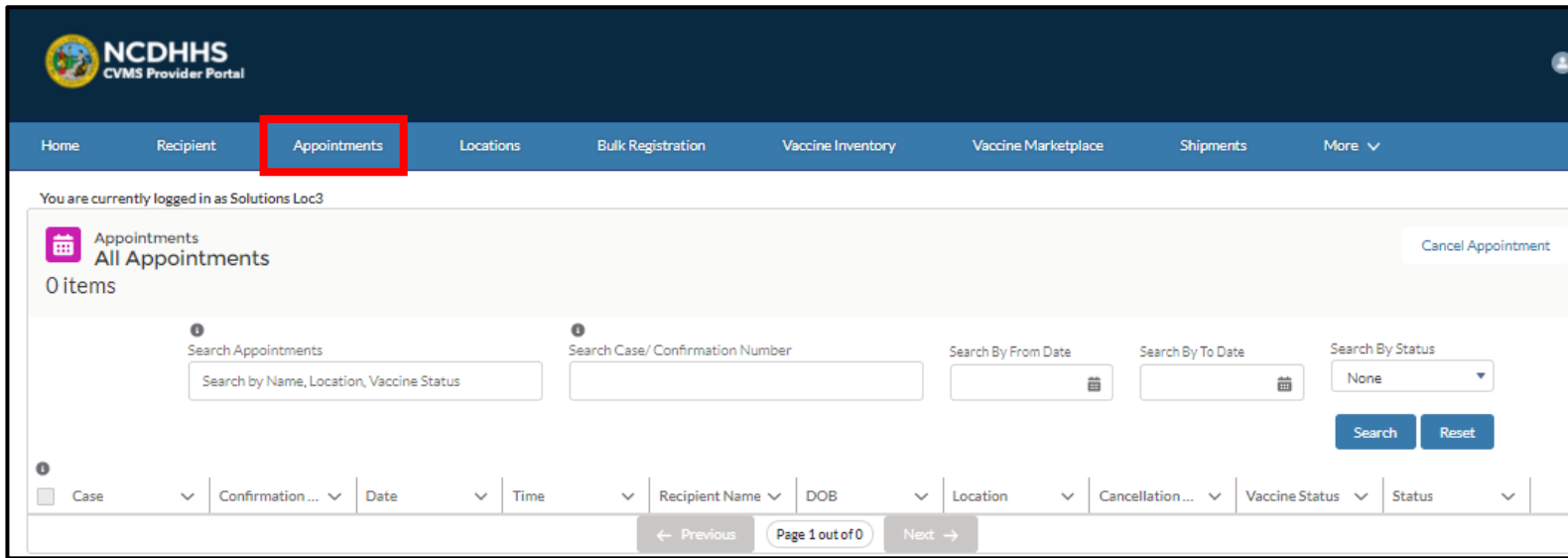
## Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

## Tips

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Point of Care User Guide** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers>.

## Step 3 of 13: Appointments Tab Overview



The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments (highlighted with a red box), Locations, Bulk Registration, Vaccine Inventory, Vaccine Marketplace, Shipments, and More. Below the navigation bar, a message states "You are currently logged in as Solutions Loc3". The main content area is titled "Appointments" and "All Appointments", showing "0 items". There are search filters for "Search Appointments" (with a hint "Search by Name, Location, Vaccine Status"), "Search Case/ Confirmation Number", "Search By From Date", "Search By To Date", and "Search By Status" (set to "None"). There are "Search" and "Reset" buttons. Below the search filters is a table with columns: Case, Confirmation..., Date, Time, Recipient Name, DOB, Location, Cancellation..., Vaccine Status, and Status. At the bottom, there are "Previous", "Page 1 out of 0", and "Next" navigation buttons.

### Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

### Tips

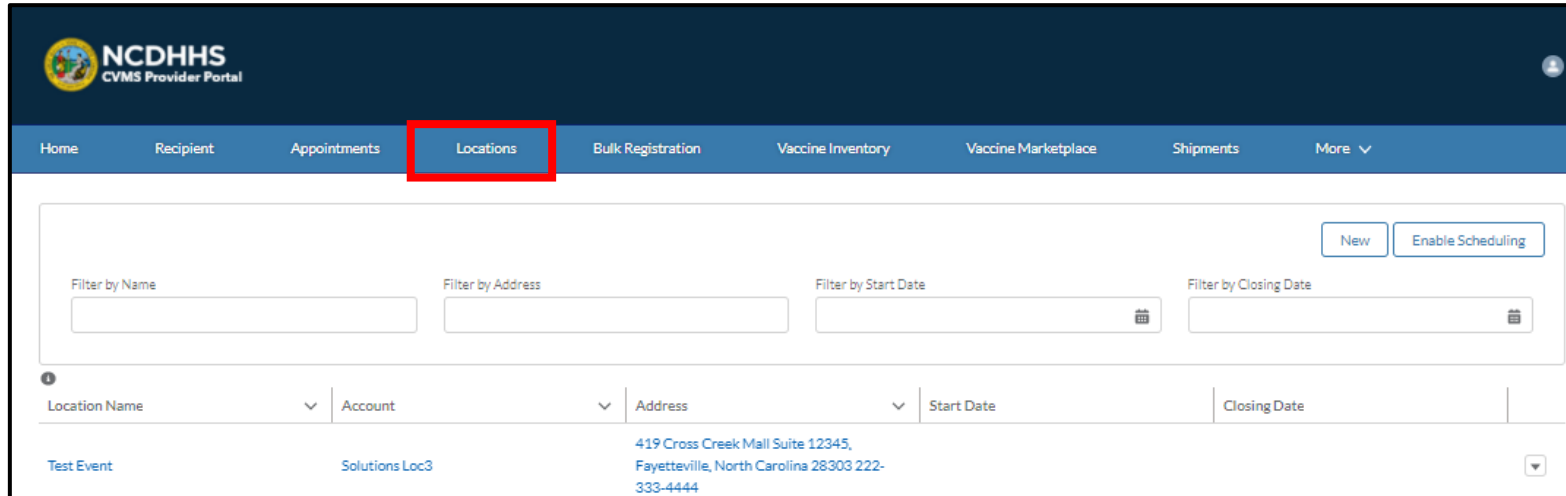
The appointments tab will default to show you appointments that are scheduled for the same day for the location you are logged in under.

The **APPOINTMENTS** tab shows a list of appointments in CVMS Provider Portal.

Click the Case Number to view appointment information. You can search appointments by Name, Location, Confirmation Code, Vaccine Status, or Date.

If your location has enabled the scheduling feature in CVMS, this is the tab where you will check-in recipients that scheduled an appointment, cancel an appointment, or schedule a second-dose appointment.

## Step 4 of 13: Locations Tab Overview



The screenshot shows the NCDHHS CVMS Provider Portal interface. The 'Locations' tab is highlighted with a red box in the top navigation bar. Below the navigation bar, there are filter fields for Name, Address, Start Date, and Closing Date, along with 'New' and 'Enable Scheduling' buttons. A table below displays location details for 'Solutions Loc3'.

Location Name	Account	Address	Start Date	Closing Date
Test Event	Solutions Loc3	419 Cross Creek Mall Suite 12345, Fayetteville, North Carolina 28303 222-333-4444		

### Audience

Healthcare Location Manager

### Tips


To learn more about using the scheduling feature in CVMS to manage appointments **click here**.

To learn more about how to allow recipients to schedule appointments **click here**.

The **LOCATIONS** tab can be used to list your location's details on the Vaccine Site Locator website (<https://vaccines.gov>), and to share your scheduling website to recipients. You can also create additional locations to list on the Vaccine Site Locator website (e.g., a community vaccination event covered by your location). If your location elects to use the scheduling feature in CVMS, your location record links to the scheduling feature in CVMS so that recipients can use CVMS to book appointments at your location.

**Note:** This tab will only be available if you have the Healthcare Location Manager profile.

# Step 5 of 13: Bulk Registration Tab Overview



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Low Volume (100)

High Volume (5,000)

Recipient Upload

If you're uploading 100 employees or less, upload file here.

Drag and Drop CSV file here

Total number of records: 449

Search this list...

First Name

Last Name

Date of Birth

Email

## Audience

Healthcare Location Manager

Statewide Location Manager

## Tips

Learn more about uploading your eligible employees or individuals to invite them to register for the COVID-19 vaccine in the **CVMS Provider Portal Bulk Upload User Guide**

The **BULK REGISTRATION** tab allows you to upload a list of recipients and generate their invitation to register in the COVID-19 Vaccine Portal to receive a COVID-19 vaccine.

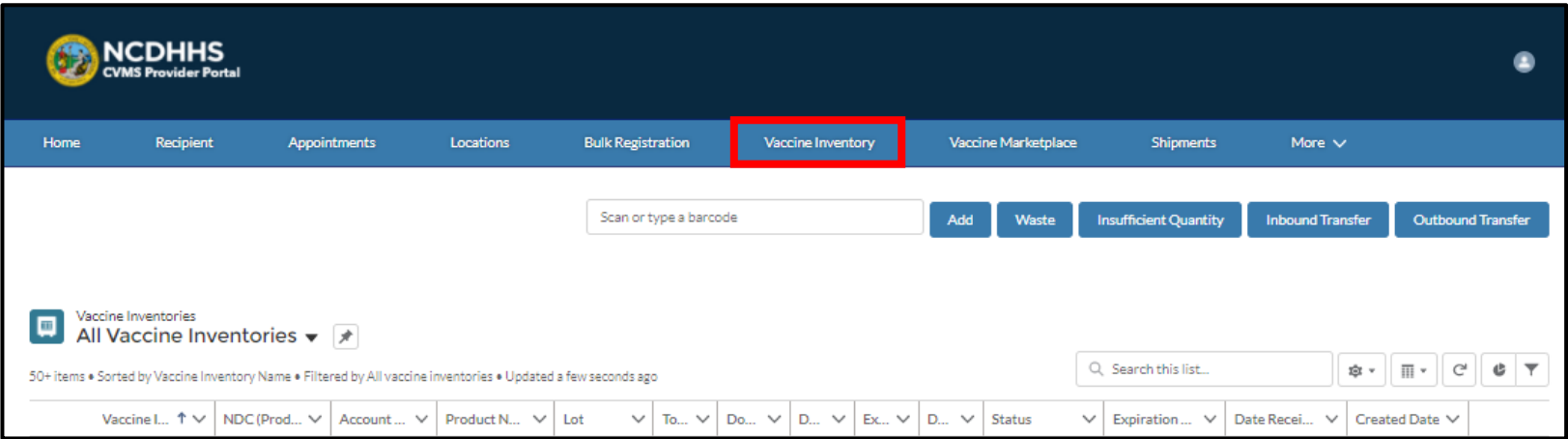
# Step 6 of 13: Vaccine Inventory Tab Overview

## Audience




Healthcare Location Manager

## Tips

Learn more about managing your COVID-19 vaccine inventory in the **Receiving and Managing Vaccine Inventories User Guide**



The **VACCINE INVENTORY** tab is used to manage your COVID-19 vaccine inventory.

- 1. To pin a list view, click . The pinned list view will then load as the default list view.
- 2. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record  (alphanumerically) or its last  (Down Sort icon).
- 3. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

**Note:** This tab will only be available if you have the Healthcare Location Manager profile.

# Step 7 of 13: Vaccine Marketplace Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All (Active)

17 items • Sorted by Account Name • Filtered by All orders - Status, Order Record Type • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Edit

Print

Filter


	<input type="checkbox"/> Order Number	Request Type	Account Name	County	City	Product	Br...	D...	Expiration...	Created Date	Last Modified D...	Status	
1	<input type="checkbox"/> <a href="#">ORD-0017344</a>	Wanted (to Rec...	<a href="#">Training Team V...</a>	Wake	Raleigh	Pfizer-BioNtech		30		6/9/2021, 11:4...	6/9/2021, 11:4...	Active	
2	<input type="checkbox"/> <a href="#">ORD-0017343</a>	Wanted (to Rec...	<a href="#">Training Team V...</a>	Wake	Raleigh	Janssen (J&J)		300		6/9/2021, 11:2...	6/11/2021, 12:...	Active	
3	<input type="checkbox"/> <a href="#">ORD-0017342</a>	Extra (to Send ...	<a href="#">Training Team V...</a>	Wake	Raleigh	Pfizer-BioNTec...		150	1/1/2022	6/9/2021, 10:5...	6/14/2021, 11:...	Active	
4	<input type="checkbox"/> <a href="#">ORD-0017360</a>	Extra (to Send ...	<a href="#">TestLoc_UAT1</a>	Yadkin	towns...	Moderna (10 d...		100	8/31/2021	6/14/2021, 11:...	6/14/2021, 11:...	Active	

## Audience

Healthcare Location Manager

- 1. The **VACCINE MARKETPLACE** tab allows Healthcare Location Managers to directly communicate and collaborate to arrange for the transfer of vaccine inventory from site to site
- 2. Healthcare Location Managers can seek matches, place wanted transfers, and place extra transfers.

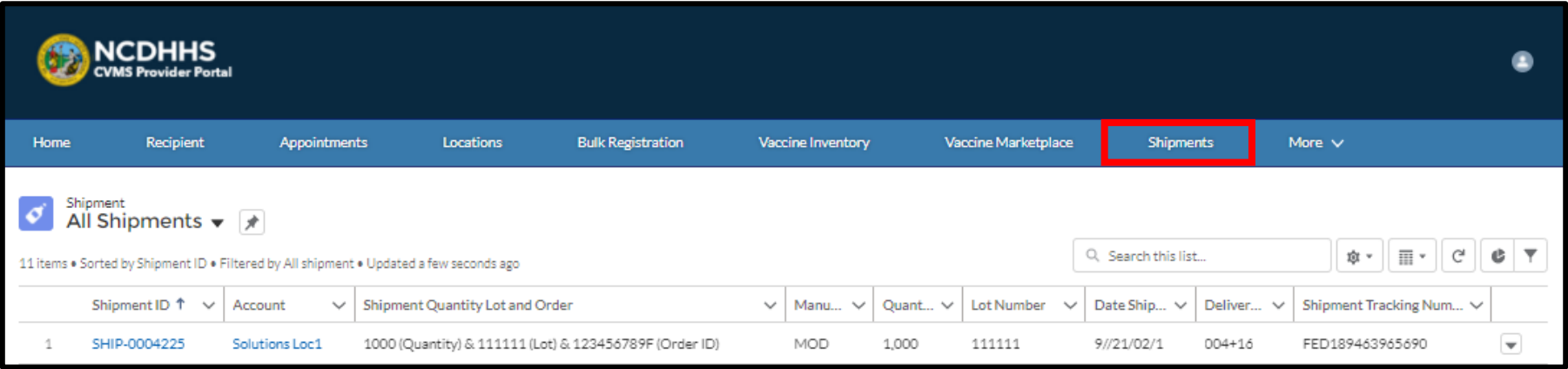
**Note:** This tab will only be available you have the Healthcare Location Manager profile.






NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

25

# Step 8 of 13: Shipments Tab Overview



- 1. The **SHIPMENTS** tab allows you to see your location’s COVID-19 vaccine shipment information
- 2. To pin a list view, click  . The pinned list view will then load as the default list view.
- 3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column’s first record  (alphanumerically) or its last  (Down Sort icon).
- 4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

**Note:** This tab will only be available you have the Healthcare Location Manager profile.

## Audience

Healthcare Location  
Manager

## Tips

Learn more about  
administrating your COVID-  
19 vaccine inventory in the  
**Receiving & Processing  
Vaccine Inventory  
Shipments User Guide**

# Step 9 of 13: Organization Management Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

New OrganizationContact

Organization ManagementHelp & InformationReportsAccount ManagementFiles

Accounts

All Business Accounts

Name

Industry

All

ACCOUNT NAME	INDUSTRY	PHONE	ADDRESS
TESTEmployerOrg	Critical Manufacturing	222-222-2222	asdf asdf asdf 22222
Grace Commercial Org	Commercial Facilities for Essential Goods	555-555-5555	2222 North St Charlotte North Carolina 27603

## Audience

Healthcare Location Manager

The **ORGANIZATION MANAGEMENT** tab allows you to invite essential workers' organizations to connect to CVMS. Once invited, these organizations can access the CVMS Organization Portal where they will be allowed to upload their list of eligible recipients. These recipients will then be able to register in the COVID-19 Vaccine Portal, saving time when they go to receive their first dose of the COVID-19 vaccine.

# Step 10 of 13: Help and Information Tab Overview

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More ^

Top Articles

General Information

COVID-19 Vaccination Questionnaire

Frequently Asked Questions

Am Eligible For The Vaccine?

When Will The Vaccine Be Available?

Dictionary For Provider Reports

Recipient Vaccination Report Dictionary

HCP Healthcare Roles Report - Dictionary

Inventory Summary Report Dictionary

Organization Management

Help & Information

Reports

Account Management

Files

Audience

Healthcare Location Manager

Statewide Location Manager

The **HELP & INFORMATION** tab allows you to see Frequently Asked Questions and General Information about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccine Registration Form.

# Step 11 of 13: Report Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore ^

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

ReportsAll Reports7 items

REPORTS

Recent

Created by Me

Private Reports

All Reports

FOLDERS

All Folders

Report Name	Description	Folder	Created By	Created On
Availability Report	Availability Report per Skedulo location	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
Dose 1 Vaccine Supply Report	Vaccine supply Current Stock for Dose 1	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
Dose 2 Vaccine Supply Report	Vaccine supply Current Stock for Dose 2	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
HCLM EHR Error Report - Cases		2489 Reports	George Jaramillo	2/14/2021, 8:53 PM

## Audience

Healthcare Location Manager

## Tips

Learn more about reporting in the **CVMS Provider Portal User Guide**

The **REPORTS** tab is used to access your COVID-19 vaccine reports. Click on **ALL REPORTS** to access the prepackaged reports available to you.

**Note:** This tab will only be available if you have the Healthcare Location Manager profile.

**CDPHHS**  
CVMS Provider Portal

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory Vaccine Marketplace Shipments More

### Instructions for Healthcare Provider Bulk Upload

- To provide access to multiple users at one time, please use the [Bulk HCP Upload template](#). The template requires first name, last name, NCID username, email address and profile type for each person c  
spelled exactly as specified or the upload will fail.
  - Profile types:
    - A [Healthcare Provider](#) is responsible for Recipient check-in, point-of-care Recipient registration, Recipient eligibility verification, and vaccine administration detail capture.
    - A [Healthcare Location Mgr](#) is responsible for viewing, receiving, and adding inventory; viewing orders and shipment details; viewing and updating vaccine inventory levels; managing locat  
upload, managing Scheduling of appointments (optional), adding / managing / deactivating HCP Users, adding frontline organizations, reviewing reports, and additionally - all of the activit
  - If you have users that do not have an NCID, have them follow [these instructions](#) to obtain one.
- Enter the required fields for every healthcare provider who needs access to the portal. Only 100 users can be uploaded at a time. If your list contains more than 100 users, please create a second docum
- Once you have entered all the information in the Bulk HCP Upload Template, save the file as a .csv file.
- Submit one file at a time by dragging and dropping the .csv file into the box below. A popup will appear to tell you if your upload was successful and if any records failed to upload.
  - If upload fails: You will get an immediate notification if there are any errors uploading your file.
  - If any records fail: Your file may have uploaded partially. In this case, you will receive a list by email with a column labeled "Error" which identifies the issue with each failed record. Once you have resolved all the indicated errors, delete the  
"Error" column and repeat Step 3 to upload the remaining records.
- Your successfully uploaded records will display on this page below Search by Contact's Name or NCID.

Drag and Drop CSV file here

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

☒ Check this box to search for all contacts (including contacts not at my location)

Name	Email	Title	NCID	Direct Account Name	Profile	Active
TestProvider Test	kaitlin.gates@accenture.com			Solutions Hospital	vProvider Community Login	Yes

## Audience

## Healthcare Location Manager

## Tips

To learn more about creating and managing user accounts **[click here](#)**.

# Step 13 of 13: Files Tab Overview

Home   Recipient   Appointments   Locations   Bulk Registration   Vaccine Inventory   Vaccine Marketplace   **More ^**

Files

Owned by Me

1 item • Sorted by Last Modified Date

Owned by Me

Shared with Me

Recent

Following

Libraries

Title	Owner	Last Modified Date ↓
		5/14/2021, 12:55 PM

Shipments

Organization Management

Help & Information

Reports

Account Management

**Files**

The **FILES** tab allows certain Healthcare Location Managers to receive customized report files from the CVMS team.

**Note:** Most users will not have access to this feature.

## Audience

Healthcare Location Manager

## Tips

Learn more about the Files tab in the **CVMS Provider Portal - Access Custom Reports in Files Tab Job Aid** at <https://covid19.ncdhhs.gov/vaccines/providers/cvms-user-guides-recorded-trainings-and-upcoming-trainings>.

# How to Use the Vaccine Virtual Agent

# Launching the Vaccine Virtual Agent

The CVMS Provider Portal includes an automated virtual agent to help answer common questions about system use and functionality.

- 1. From the home screen, click on the **VIRTUAL AGENT ICON** to launch

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as Solutions Loc3

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Search Name

Date Of Birth

MM/DD/YYYY

Email

Search Email

Search

Please be sure to bookmark this site: <https://training-ncdhhs.cs33.force.com/VaccineProvider>

Your Information is Protected

Personal information about your vaccination and health is carefully managed to protect your privacy. Information is kept confidential under law and is not shared with ICE for immigration enforcement. Getting the vaccine does not have a negative impact on people's chances of adjusting their immigration status. To meet federal requirements from the Centers for Disease Control and Prevention (CDC) and following NC state law, NC does not share any identifiable information to CDC. Instead of the CDC requested identifying information, NC is currently submitting an individual's year of birth (not date of birth), the first 3 digits of the vaccine recipient's zip code of residence (as long as that zip code includes more than 20,000 people), and the date of reporting to CDC.

How may I help you?

Click here >>

## Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

# Vaccine Virtual Agent

The CVMS Virtual Agent launches in a new window.

1. Read the message, then click **I AGREE**

## Vaccine Virtual Agent

We collect session information to personalize your experience, improve the quality of the virtual agent, provide new content and features over time, and analyze the traffic. It includes:

- Your interactions with the Virtual Agent (i.e., text of original questions entered and responses received, buttons clicked, session date and time)

When interacting with the virtual agent, you do not need to enter any personal information (i.e. your name, address, email address, login, password...).

By clicking "I agree", you consent to the collection and use of your information for analytical purposes and for services provided by the Department of Health and Human Services of the State of North Carolina.

I Agree

## Audience

Healthcare Provider

Healthcare Location  
Manager

Statewide Location  
Manager

# Vaccine Virtual Agent (continued)

- 2. Select your type of profile
- 3. Answer subsequent questions to find solutions to frequently encountered issues and questions

Vaccine Virtual Agent

We collect session information to personalize your experience, improve the quality of the virtual agent, provide new content and features over time, and analyze the traffic. It includes:

- Your interactions with the Virtual Agent (i.e., text of original questions entered and responses received, buttons clicked, session date and time)

When interacting with the virtual agent, you do not need to enter any personal information (i.e. your name, address, email address, login, password...).

By clicking "I agree", you consent to the collection and use of your information for analytical purposes and for services provided by the Department of Health and Human Services of the State of North Carolina.

I Agree

I Agree

Hi! I'm Sophia, the State of North Carolina's virtual agent for Covid-19 vaccines.

I am here to serve Healthcare Providers, Help Desk Representatives and Organization Administrators.

Before we start, please select one of the options below.

Healthcare Provider

Help Desk Representative

Organization Administrator

Other

Type your message...

## Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

# **Access Reports** **(Users with a Location Manager Profile Only)**

# Overview

**Report: Users RT Custom HCP Healthcare Roles**  
This report identifies all users and associated roles at the location of the logged in user.

**Report: Appointments with Accounts and Contacts Recipient Vaccination Report**  
This report shows the completed vaccine administration details for the current logged in user's location(s).

**Report: Vaccine Inventory with Order and Shipment fields Inventory Summary Report**  
This report allows users to view their location(s) vaccine inventories.

Total Records	Total Doses Administered	Total Doses Transferred	Total Doses Wasted	Total Doses Insufficient Quantity	Total Total Doses	Total Extra Doses	Total Actual Doses
89	92.00	4,132	435.00	66	57,338	761	58,099

Vaccine Inventory Name	Lot	Product	NDC (Product)	Expiration Date/Time	Date Received	Status
Lot 432 Delivery 02/26/2021	Lot 432	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	2/26/2021, 10:20 AM	Available
FED Lot 999 Delivery 03/03/2021	Lot 999	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/3/2021, 10:24 AM	Available
# GFS Lot 456 - Delivery 02/19/2021	456	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	7/24/2021, 12:00 PM	2/19/2021, 4:59 PM	Available
Lot 123 - Delivery 02/19/2021	123	Pfizer-BioNTech (age 12+) (195 MDV) COVID-19 Vaccine	59267-1000-02	10/31/2021, 12:00 PM	2/19/2021, 4:57 PM	Available
FED Delivery 03/04/2021 Lot: 4444	4444	Pfizer-BioNTech (age 12+) (195 MDV) COVID-19 Vaccine	59267-1000-02	3/31/2022, 12:00 PM	3/4/2021, 4:05 PM	Available
Delivery 03/09/2021	Mod123	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	9/30/2021, 12:00 PM	3/9/2021, 9:32 AM	Available
Delivery 03/09/2021	Lot UA 8975	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/9/2021, 12:00 PM	Available
Lot 555 Delivery 03/10/2021	Lot 555	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/10/2021, 10:21 AM	Available
Lot 5432 Delivery 03/11/2021 2nd	Lot 5432	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	7/31/2021, 12:00 PM	3/11/2021, 2:22 PM	Available
FED Delivery 03/05/2021	4444	Pfizer-BioNTech (age 12+) (195 MDV) COVID-19 Vaccine	59267-1000-02	12/31/2021, 12:00 PM	3/5/2021, 12:38 PM	Available
Lot 66666666 Delivery 03/08/2021	66666666	Pfizer-BioNTech (age 12+) (195 MDV) COVID-19 Vaccine	59267-1000-02	10/7/2021, 12:00 PM	3/8/2021, 2:52 PM	Available
Lot 789 Delivery 03/04/2021	Lot 789	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	12/31/2021, 12:00 PM	3/4/2021, 2:26 PM	Available
Delivery 03/01/2021	777	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	5/6/2021, 12:00 PM	3/1/2021, 1:54 PM	Available

A report is a list of records that meet defined criteria. It is displayed in the CVMS Provider Portal in rows and columns, and can be filtered and sorted, or exported into Excel. It shows the latest data, and automatically updates as each record updates. This user guide will show you:

1. How to access the reports
2. How to filter or export report data
3. What reports are available in the CVMS Provider Portal

Only users with a **Healthcare Location Manager** profile can access available reports. They cannot create new reports or add new fields to the existing reports.

# Reports available in the CVMS Provider Portal

---

There are several reports currently available for Healthcare Location Managers. These are the most common:

1. **Expiring Doses by Account and Manufacturer Report** – provides a breakdown of upcoming vaccine expirations to help prioritize administration or transfers
2. **HCP Healthcare Roles Report** - identify all users and associated roles at the location of the logged-in user
3. **Inventory Summary Report** - view your location(s) COVID-19 vaccine inventories
4. **Marketplace Inquiries Report** – view all inquiries made against your seek transfer matches in the Vaccine Marketplace
5. **Recipient Vaccination Report** - view all recipient vaccination details of your location(s)

## Audience

Healthcare Location  
Manager

# Accessing Reports

All reports that can be accessed by a Location Manager can be viewed in the **ALL REPORTS** section.

- 1. Once logged in, navigate to the **MORE** tab and click on **REPORTS**.
- 2. Select **ALL REPORTS** on the side menu.
- 3. Click on the **NAME OF THE REPORT** you wish to run.

## Audience

Healthcare Location Manager

## Note

The page displayed when clicking the **REPORTS** tab will include standard fields and features that cannot be leveraged with your current profile level. Views named 'Created by Me', 'Private Reports', 'Shared with Me', and 'All Favorites' will not display any reports.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

ReportsAll Reports10 items

REPORTSRecentCreated by MePrivate ReportsAll ReportsFOLDERSAll FoldersCreated by MeShared with MeFAVORITESAll Favorites

Report Name	Description	Folder	Created By	Created On
Availability Report	Availability Report per Skedulo location	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
Dose 1 Vaccine Supply Report	Vaccine supply Current Stock for Dose 1	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
Dose 2 Vaccine Supply Report	Vaccine supply Current Stock for Dose 2	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
HCLM EHR Error Report - Cases		2489 Reports	George Jaramillo	2/14/2021, 8:53 PM
HCP Healthcare Roles	This report identifies all users and associated roles at the location of the logged in user.	Provider Reports	George Jaramillo	1/31/2021, 8:30 PM
Inventory Summary Report	This report allows users to view their location(s) vaccine inventories.	Provider Reports	George Jaramillo	2/1/2021, 12:02 AM

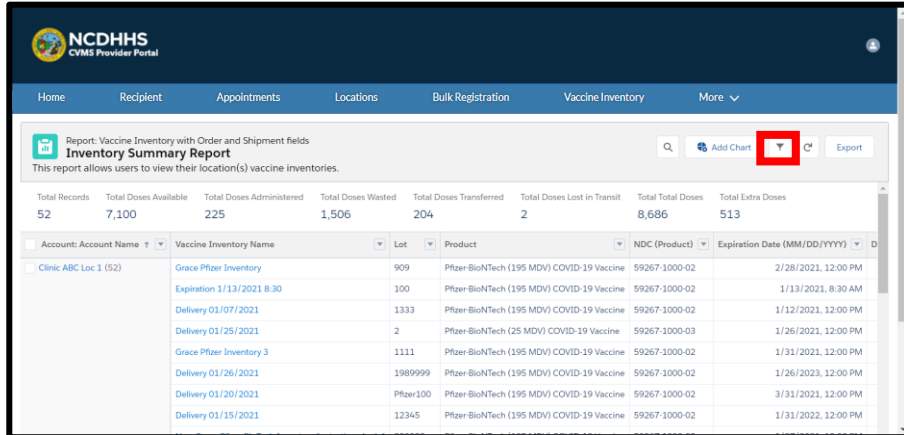
# **Accessing Reports**

## **1 - Learn how to Filter and Format Reports**

# Applying Filters

**FILTERS** can be accessed through the filter button on a report to modify the criteria that were set for the report. Each report will have a different list of filters available.

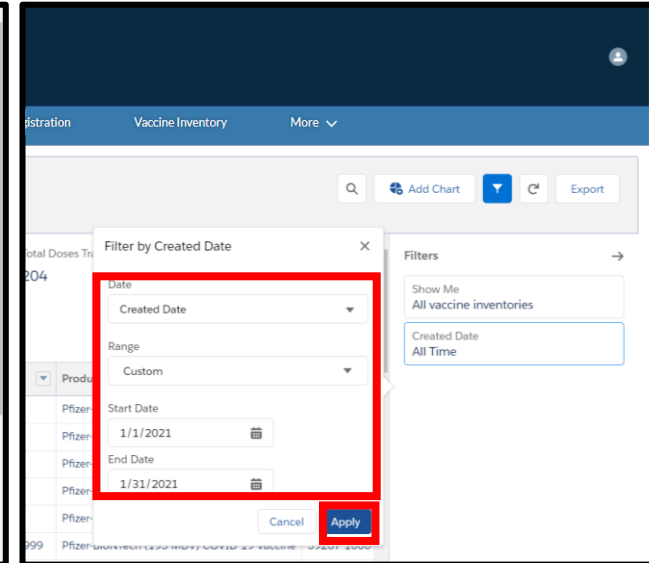
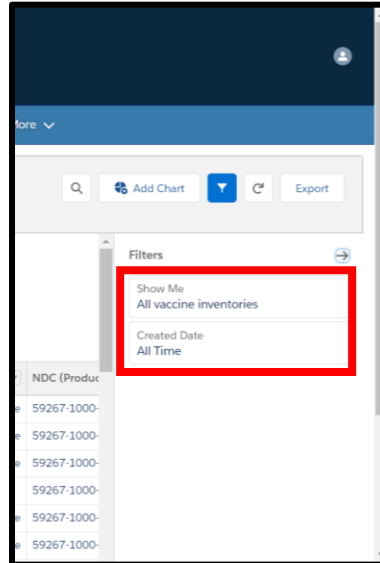
1. Click the **FILTER** icon.
2. Click the different filter's criteria fields.
3. Select the appropriate filter using the drop-down menus.
4. Click **APPLY** to view results.



Report: Vaccine Inventory with Order and Shipment Fields  
**Inventory Summary Report**  
This report allows users to view their location(s) vaccine inventories.

Total Records	Total Doses Available	Total Doses Administered	Total Doses Wasted	Total Doses Transferred	Total Doses Lost in Transit	Total Total Doses	Total Extra Doses
52	7,100	225	1,506	204	2	8,686	513

Account: Account Name	Vaccine Inventory Name	Lot	Product	NDC (Product)	Expiration Date (MM/DD/YYYY)
Clinic ABC Loc 1 (52)	Grace Pfizer Inventory	909	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	2/28/2021, 12:00 PM
	Expiration 1/13/2021 8:30	100	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/13/2021, 8:30 AM
	Delivery 01/07/2021	1333	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/12/2021, 12:00 PM
	Delivery 01/25/2021	2	Pfizer-BioNTech (25 MDV) COVID-19 Vaccine	59267-1000-03	1/26/2021, 12:00 PM
	Grace Pfizer Inventory 3	1111	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/31/2021, 12:00 PM
	Delivery 01/26/2021	1989999	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/26/2021, 12:00 PM
	Delivery 01/20/2021	Pfizer100	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	3/31/2021, 12:00 PM
	Delivery 01/15/2021	12345	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/31/2022, 12:00 PM



## Audience

Healthcare Location  
Manager

## Tips

You can revert to the default filters on any report by refreshing your webpage.

# Removing Filters

It is sometimes possible to remove some filter's criteria. Any criteria that is eligible to remove from the filter is identified via the **DELETE** icon.

- 1. Click the **FILTER** icon
- 2. Click the **DELETE** icon on eligible filter's criteria

## Audience

Healthcare Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Report: Appointments with Accounts and Contacts

Recipient Vaccination Report

This report shows the completed vaccine administration details for the current logged in user's location(s).

Search

Export

Total Records

202

Account Name: Account Name

Account Name: Provider PIN

Date and Time of Vaccination

Contact Name: Account Name: Last Name

Clinic ABC Loc 1 (202)

11122 (202)

1/30/2021 (1)

TestLast1013

Subtotal

1/29/2021 (4)

Recipient

Subtotal

1/28/2021 (13)

kiki

Filters

Show Me

All appointments

Appointment DateTime

All Time

Vaccine Status

equals Dose 1 Administered, Dose 2 Administered

Account Name: VTrckS ID for this location

not equal to ""

# Formatting Reports

Several buttons are available to change the format of the Reports:

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Report: Vaccine Inventory with Order and Shipment fields

Inventory Summary Report

This report allows users to view their location(s) vaccine inventories.

Q

Add Chart

Export

Total Records

52

Total Doses Available

7,098

Total Doses Administered

227

Total Doses Wasted

1,506

Total Doses Transferred

204

Total Doses Lost in Transit

2

Total Total Doses

8,686

Total Extra Doses

513

☐ Account: Account Name

Vaccine Inventory Name

Lot

Product

NDC (Product)

Expiration Date (MM/DD/YYYY)

Date and Time Received (MM/DD/YYYY)

☐ Clinic ABC Loc 1 (52)

Grace Pfizer Inventory

909

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

2/28/2021, 12:00 PM

1/12/2021, 12:00 PM

Expiration 1/13/2021 8:30

100

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/13/2021, 8:30 AM

1/12/2021, 12:00 PM

Delivery 01/07/2021

1333

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/12/2021, 12:00 PM

1/7/2021, 12:00 PM

Delivery 01/25/2021

2

Pfizer-BioNTech (25 MDV) COVID-19 Vaccine

59267-1000-03

1/26/2021, 12:00 PM

1/25/2021, 12:00 PM

Grace Pfizer Inventory 3

1111

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/31/2021, 12:00 PM

1/26/2021, 12:00 PM

Delivery 01/26/2021

1989999

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/26/2023, 12:00 PM

1/26/2021, 12:00 PM

Delivery 01/20/2021

Pfizer100

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

3/31/2021, 12:00 PM

1/15/2021, 12:00 PM

Delivery 01/15/2021

12345

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/31/2022, 12:00 PM

1/15/2021, 12:00 PM

New Grace Pfizer BioTech Inventory for testing abcdef

990999

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/27/2021, 12:00 PM

1/25/2021, 12:00 PM

Grace Pfizer Inventory 2

999099

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/27/2021, 12:00 PM

1/25/2021, 12:00 PM

MDRNA CMPLT Check

1

Moderna (10 MDV) COVID-19 Vaccine

80777-0273-99

1/31/2021, 12:00 PM

1/25/2021, 12:00 PM

ADAIInventory

53654255

TestVaccine1

11111-111-11

1/6/2022, 12:00 PM

1/12/2021, 12:00 PM

Grace Pfizer Inventory 5

999090

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

4/30/2021, 12:00 PM

1/26/2021, 12:00 PM

Row Counts

Detail Rows





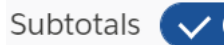

Subtotals

Grand Total

## Audience

Healthcare Location  
Manager

# Formatting Reports

1. Show or hide **TOGGLE CHART** by hitting the Chart button  or  Add Chart located at the top-right of the report; the Chart displays the number of records per location
2. Show or hide **ROW COUNTS** by clicking the Row Counts button  located at the bottom to show or hide the Total Records count field displayed at the top left of the report
3. Show or hide **DETAIL ROWS** by clicking the Row Counts button  located at the bottom to show or hide the records' details (one row = one record)
4. Show or hide **SUBTOTALS** by clicking the Row Counts button  located at the bottom to show or hide the row Subtotals which is the last row of the location
5. Show or hide **GRAND TOTAL** by clicking the Row Counts button  at the bottom of the report to show or hide the Totals displayed at the top of the report

## Audience

Healthcare Location  
Manager

## Tips


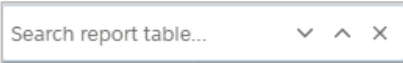

You can revert to the default format on any report by refreshing your webpage.

Formatting changes made to a report will carry over to the Format Report export option.

<


# Search a Value within a report

Use the **SEARCH** feature at the top of the report to identify records containing values matching key words.

- 1. Click on the **SEARCH BUTTON** 
- 2. Type a key word within the **SEARCH BAR** 
- 3. Each value within the report matching the key word will be highlighted in yellow.
- 4. You can navigate from one search result to the next by hitting the up and down buttons that appears within the search bar 

## Audience

Healthcare Location  
Manager



Home

Recipient

Appointments

Locations


Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments


More



Report: Vaccine Inventory with Order and Shipment fields

Inventory Summary Report

This report allows users to view their location(s) vaccine inventories.



Add Chart

Export

Total Records

Total Doses Available

Total Doses Administered

Total Doses Wasted

Total Doses Transferred

Total Doses Lost in Transit

Total Total Doses

Total Extra Doses

52

7,098

227

1,506

204

2

8,686

513

Account: Account Name

Account Name

Account Name

Account Name

Vaccine Inventory Name

Vaccine Inventory Name

Lot

Lot

Product

Product

NDC (Product)

NDC (Product)

Expiration Date (MM/DD/YYYY)

Expiration Date (MM/DD/YYYY)

Date and Time Received (MM/DD/YYYY)

Date and Time Received (MM/DD/YYYY)

Clinic ABC Loc 1 (52)

Grace Pfizer Inventory

909

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

2/28/2021, 12:00 PM

1/12/2021, 12:00 PM

Expiration 1/13/2021 8:30

100

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/13/2021, 8:30 AM

1/12/2021, 12:00 PM

Delivery 01/07/2021

1333

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/12/2021, 12:00 PM

1/7/2021, 12:00 PM

Delivery 01/25/2021

2

Pfizer-BioNTech (25 MDV) COVID-19 Vaccine

59267-1000-03

1/26/2021, 12:00 PM

1/25/2021, 12:00 PM

Grace Pfizer Inventory 3

1111

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/31/2021, 12:00 PM

1/26/2021, 12:00 PM

Delivery 01/26/2021

1089999

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

59267-1000-02

1/26/2021, 12:00 PM

1/26/2021, 12:00 PM

# **Accessing Reports**

## **2 - Learn How to Export Reports**

# Step 1 of 3: Exporting Reports

Reports can be exported into formatted or unformatted Excel or CSV file formats.

- 1. Open the report, click on **EXPORT**

## Audience

Healthcare Location  
Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Report: Appointments with Accounts and Contacts

Recipient Vaccination Report by Location

Search

Share

Filter

Refresh

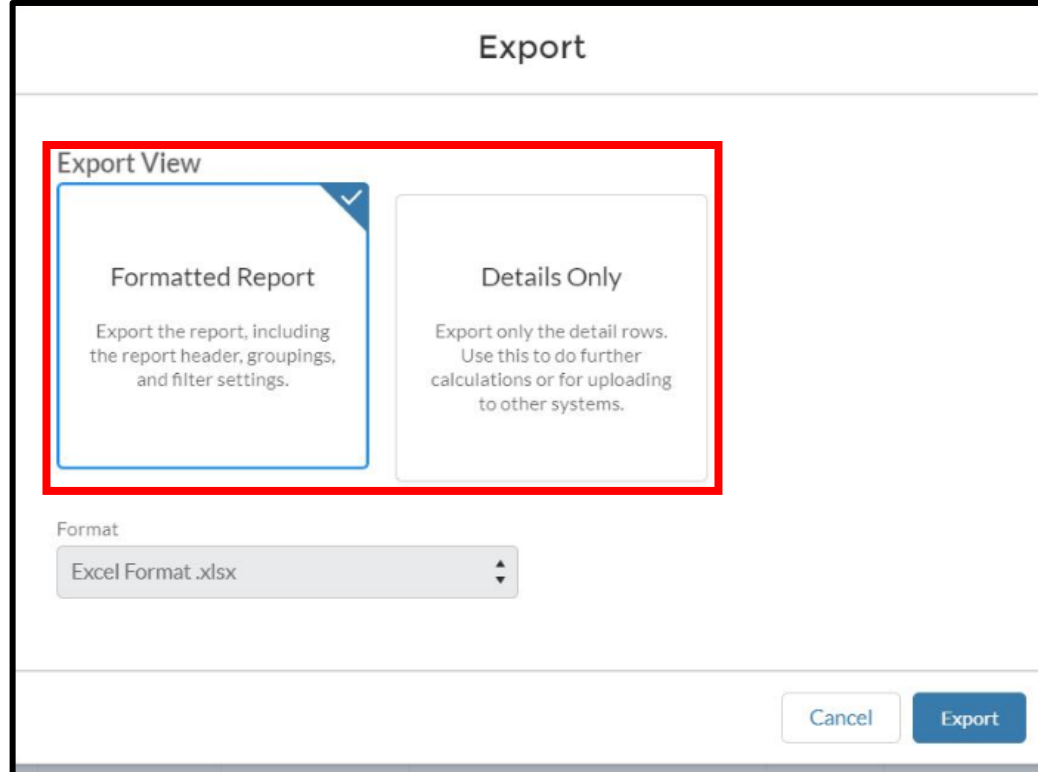
Export

Account Name: Account Name	Account Name: VTrckS ID for this location	Date and Time of Vaccination	Contact Name: Account Name: Last Name	Contact Name: Account Name: First Name
GreatVaccines Loc1 (14)	347623874 (14)	1/27/2021 (2)	Recipient-1	Vy
			Recipient-2	Vy
		Subtotal		
		1/25/2021 (6)	-	-
			Recipient-11	Harika
			Recipient-4	Harika

## Step 2 of 3: Formatting Reports

### 1. Select **FORMATTED REPORT** or **DETAILS ONLY**

- You can export your report with the same formatting, column summaries, and totals as are visible when you run the report, into the Excel file format (.xlsx) by selecting **FORMATTED REPORT**.
- For a version of your report with just the records, select **DETAILS ONLY**.



The screenshot shows a dialog box titled "Export". Inside, there is a section labeled "Export View" which contains two options: "Formatted Report" and "Details Only". The "Formatted Report" option is selected, indicated by a blue checkmark in its top right corner. Below these options is a "Format" dropdown menu currently set to "Excel Format .xlsx". At the bottom right of the dialog are "Cancel" and "Export" buttons. A red rectangular box highlights the "Export View" section.

### Audience

Healthcare Location  
Manager

### Tips

Review the previous section to see how to change the format and filters of a report.

## Step 3 of 3: Exporting Reports

1. To change the file format, use the **FORMAT** drop-down to select either **EXCEL .XLSX** or **COMMA DELIMITED .CSV**.
2. Click on **EXPORT**.
3. You will see your export appear at the **BOTTOM OF YOUR BROWSER** (or in your **DOWNLOADS FOLDER**).

### Audience


Healthcare Location  
Manager

The screenshot shows a modal window titled "Export". Inside, there are two options under "Export View": "Formatted Report" (selected with a blue checkmark) and "Details Only". Below these is a "Format" dropdown menu, which is highlighted with a red rectangle and currently shows "Excel Format .xlsx". At the bottom right, there are two buttons: "Cancel" and "Export", with the "Export" button also highlighted by a red rectangle.

# **Accessing Reports**

## **3 - Discover Available Reports**

# HCP Healthcare Roles Report



CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Report: Users RT Custom

**HCP Healthcare Roles**

This report identifies all users and associated roles at the location of the logged in user.

Total Records

60

Account: Account Name	First Name	Last Name	Contact: Title	Contact: NCID	Email	Last Login
Clinic Org1 (60)	Somnath	Mondal	-			4/15/2021, 5:42 PM
	Neelima	Vegi	Neel-HCLM			4/16/2021, 8:39 AM
	Travis	Mitchum	HCP Manager			4/15/2021, 4:31 PM
	Jennifer	Yu	-			4/14/2021, 5:07 PM
	Grace	Wilken	Healthcare Location Mgr			4/15/2021, 12:12 PM
	Tejas	Paruthooli	HCP Location Manager			4/15/2021, 5:37 PM
	Nate	Martin	location manager			4/15/2021, 1:29 PM
	Grace	Wilken	HCP			4/1/2021, 12:41 PM
	Grace	Wilken	Surge Contractor			2/25/2021, 9:34 AM

View the list of your location’s users with access to the CVMS Provider Portal as well as their assigned roles.

### INFORMATION DISPLAYED:

- First name, last name, title, NCID, email, last login

### FILTERS AVAILABLE:

- Last Login Time and Date
- Note: Filter ‘Show Me All Users’ cannot be modified

### Audience

Healthcare Location Manager

### Tips

A user associated to more than one location will only be able to see this specific report for the location that they have selected under the Location of Operation when the accessed the CVMS Provider Portal. To see this specific report for their other locations, the user will have to select the other location under the Location of Operation and then come back to this report. For more information on how to select a Location of Operation, please see the CVMS Provider Portal Vaccine Switch Location Job Aid at [CVMS Provider Portal Switch Location](#).

# Inventory Summary Report

NCDHHS

CYMS Provider Portal

Home

Recipient

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Vaccine Inventory

More

Report: Vaccine Inventory with Order and Shipment fields

Inventory Summary Report

This report allows users to view their location(s) vaccine inventories.

Total Records	Total Doses Available	Total Doses Administered	Total Doses Wasted	Total Doses Transferred	Total Doses Lost in Transit	Total Total Doses	Total Extra Doses
52	7,098	227	1,506	204	2	8,686	513

Account: Account Name

Clinic ABC Loc 1 (52)

Vaccine Inventory Name	Lot	Product	NDC (Product)	Expiration Date
Grace Pfizer Inventory	909	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	2
Expiration 1/13/2021 8:30	100	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	2
Delivery 01/07/2021	1333	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1
Delivery 01/25/2021	2	Pfizer-BioNTech (25 MDV) COVID-19 Vaccine	59267-1000-03	1
Grace Pfizer Inventory 3	1111	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1
Delivery 01/26/2021	1989999	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1
Delivery 01/20/2021	Pfizer100	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	9
Delivery 01/15/2021	12345	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1
New Grace Pfizer BioTech Inventory for testing abcdef	990999	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1
Grace Pfizer Inventory 2	999099	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1
MDRNA CMPLT Check	1	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	1
ADAINVENTORY	53654255	TestVaccine1	11111-111-11	1
Grace Pfizer Inventory 5	999090	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	9

Row Counts

Detail Rows

Subtotals

Grand Total

View your locations' inventory summary details.

## INFORMATION DISPLAYED:

- Inventory Record: inventory name, lot number, Product name, NDC, Expiration Date, Date and Time Received, Inventory Status (Available, Complete, Wasted, Reserved for Future use)
- Quantities: doses available, doses administered, doses wasted, doses transferred, doses lost in transit, total doses and extra doses

## FILTERS AVAILABLE:

- Created Dates: filter on inventory received dates, inventory expiration date, transfer date, record creation date, etc.
- Note: Filter 'All Vaccine Inventories' should not be modified.

## Audience

Healthcare Location Manager

## Tips

**DOSES AVAILABLE =**

Total Doses + Extra Doses  
MINUS

(- Doses Administered

- Doses Wasted

- Doses transferred

- Doses lost in transit)

A user associated to more than one location will see inventory information associated to each of these locations in this report.

# Recipient Vaccination Report

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Report: Appointments with Accounts and Contacts

**Recipient Vaccination Report**

This report shows the completed vaccine administration details for the current logged in user's location(s).

Total Records

204

<input type="checkbox"/> Account Name: Account Name ↑	<input type="checkbox"/> Account Name: Provider PIN ↑	<input type="checkbox"/> Date and Time of Vaccination ↓	<input type="checkbox"/> Contact Name: A
<input type="checkbox"/> Clinic ABC Loc 1 (204)	11122 (204)	1/31/2021 (2)	Jones
			Doe
		Subtotal	
		1/30/2021 (1)	TestLast1013
		Subtotal	
		1/29/2021 (4)	Recipient
			RightName
			Deere4
			enderr1
		Subtotal	
		1/28/2021 (13)	xlxl
			TestLast1014.1
<input type="checkbox"/> Clinic ABC Loc 1 (204)	11122 (204)	1/31/2021 (2)	

☐ Row Counts

☒ Detail Rows

☒ Subtotals

☒ Grand Total

View all recipient vaccination details of your location.

## INFORMATION DISPLAYED:

- Vaccination details: date and time, injection site, route, vaccine status (dose 1 administered, dose 2 administered), product, lot number, inventory name, administered by, notes
- Recipient details: last name, first name, birthdate, age, phone, email address, race, ethnicity, gender, priority tier group, contact county, eligibility status
- Location details: vaccine administration county, address

## FILTERS AVAILABLE:

- Vaccine Status: click the remove button to see all appointment status (including those Registered, Canceled or Scheduled)
- Appointment Date Time: filter on Date/Time Closed, Opened, Date and Time of Vaccination, Date of Birth, Last Modified Date
- Note: Filters ‘All Appointments’ and ‘VTrckS ID’ should not be modified

## Audience

Healthcare Location  
Manager

## Tips

A user associated to more than one location will see vaccination information associated to each of these locations in this report.

# **Accessing Reports**

## **4 - Check Reports' Data Dictionaries in the Help & Information tab**

# Accessing Help & Information

Find the Help & Information section to see detailed information for each type of report.

- 1. Navigate to **MORE** on the Menu Bar then select **HELP & INFORMATION**

## Audience

Healthcare Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore ^

You are currently logged in as TestLoc\_UAT1

Select Location

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER
------	---------	-------------

Organization Management

Help & Information

Reports

Account Management


Files

# Dictionary for Provider Reports

- 1. Navigate to and click on the **DICTIONARY FOR PROVIDER REPORTS** to see associated articles.

## Audience

Healthcare Location  
Manager



Home   Recipient   Appointments   Locations   Bulk Registration   Vaccine Inventory   Vaccine Marketplace   Shipments   More ▾

### Top Articles

#### General Information

Download the Recipient Registration and Vaccine Administratio...

#### Frequently Asked Questions

Am Eligible For The Vaccine?

When Will The Vaccine Be Available?

Dictionary For Provider Reports

Recipient Vaccination Report Dictionary

HCP Healthcare Roles Report - Dictionary

Inventory Summary Report Dictionary

# Selecting Articles in the Dictionary for Provider Reports

- 1. Select the desired article to view.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Dictionary For Provider Reports

Description

These user guides provide a definition for all Fields shown in the available reports found under Provider Reports Folder via the Reports tab.

Recipient Vaccination Report Dictionary

This user guide provides a definition for all Fields shown in the Recipient Vaccination Report found under Provider Reports Folder via the Reports tab.

32 Views • Jun 8, 2021 • Knowledge

Inventory Summary Report Dictionary

This user guide provides a definition for all Fields shown in the Inventory Summary Report found under Provider Reports via the Reports tab.

19 Views • Jun 8, 2021 • Knowledge

HCP Healthcare Roles Report - Dictionary

This user guide provides a definition for all Fields shown in the HCP Healthcare Roles Report found under Provider Reports Folder via the Reports tab.

25 Views • Jun 2, 2021 • Knowledge

## Audience

Healthcare Location Manager

# Recipient Vaccination Report Dictionary

1. Each dictionary will provide a detailed list of terms for each report available.

## Audience

Healthcare Location  
Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

DICTIONARY FOR PROVIDER REP...

### Recipient Vaccination Report Dictionary

This user guide provides a definition for all Fields shown in the Recipient Vaccination Report found under Provider Reports Folder via the Reports tab.

Feb 4, 2021 • Knowledge

Title

Recipient Vaccination Report Dictionary

Summary

This user guide provides a definition for

Content

This report is *only viewable* by Healthcare

Section	Field
Details	Account Name: Account Name
Details	Account Name: Provider PIN
Details	Date and Time of Vaccination
Details	Contact Name: Account Name: L
Details	Contact Name: Account Name: F
Details	Contact Name: Birthdate
Details	Contact Name: Age
Details	Contact Name: Home Phone

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

DICTIONARY FOR PROVIDER REP...

### Inventory Summary Report Dictionary

This user guide provides a definition for all Fields shown in the Inventory Summary Report found under Provider Reports via the Reports tab.

Feb 4, 2021 • Knowledge

Title

Inventory Summary Report Dictionary

Summary

This user guide provides a definition for all Fields shown in the Inventory Summary Report found under

Content

This report is *only viewable* by Healthcare Organization Admins and Healthcare Location Managers.

Field	Definitions
Account: Account Name	The Vaccine Provider location name
Vaccine Inventory Name	The name of the Vaccine Inventory Is given default name "Delivery MM/DD"
Lot	Unique identifier for the received Vaccine product's batch
Product	The Manufacturer of the Vaccine Product
NDC (Product)	Each Listed drug product is assigned a 10-digit, 3-segment number The id
Expiration Date (MM/DD/YYYY)	The date the Vaccine Product and all associated dosage is unusable
Status	Indicates the current state of Vaccine Product, can be: Complete, Reserve
Date and Time Received (MM/DD/YYYY)	The date and time the Vaccine Product was received by the Location This
Total Doses	Sum of all Doses when Inventory records were initially created, prior to re

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

DICTIONARY FOR PROVIDER REP...

### HCP Healthcare Roles Report - Dictionary

This user guide provides a definition for all Fields shown in the HCP Healthcare Roles Report found under Provider Reports Folder via the Reports tab.

Feb 4, 2021 • Knowledge

Title

HCP Healthcare Roles Report - Dictionary

Summary

This user guide provides a definition for all Fields shown in the HCP Healthcare Roles Report found under Provider Reports Folder via the Reports tab.

Content

This report is *only viewable* by Healthcare Organization Admins and Healthcare Location Managers.






Section	Field	Definitions
Details	Account: Account Name	The Location Name
Details	First Name	The First Name of the user at this location
Details	Last Name	The Last Name of the user at this location
Details	Title	The Title of the user at this location
Details	Contact: NCID	Unique username login ID for North Carolina systems
Details	Email	The email address of the user
Details	Last Login	The date and time this HCP user last logged into the system

# Appendix

# Additional Notes

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## 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 details 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

Version	Date	Changes Made	Author
1	12/10/2020	<ul style="list-style-type: none"> <li>Uploaded the first version of the PPT</li> </ul>	Training Team
2	1/10/2021	<ul style="list-style-type: none"> <li>Removed any mention of the 2 CVMS Help Desk emails</li> <li>Added Service Now Portal information</li> <li>Screenshot of new bulk upload added</li> </ul>	Courtney Seward
3	1/15/2021	<ul style="list-style-type: none"> <li>Updated navigation bars for both CVMS Provider Profiles</li> <li>Updated Recipient Tab search feature</li> </ul>	Azalea Troche
4	2/1/2021	<ul style="list-style-type: none"> <li>Updated the screen shots for Location manager to show reports tab on nav bar</li> <li>Added Statewide Profile content</li> <li>Added Reports tab content and Appointments tab content</li> </ul>	Kristin Clark; Tabitha McKelvy
5	2/12/2021	<ul style="list-style-type: none"> <li>Add Slides for Account Management and Organizational Management</li> <li>Added session expired tip</li> <li>Added multi locations slide</li> <li>Updated screen shots of the expanded more tabs list</li> </ul>	Kristin Clark
6	3/11/2021	<ul style="list-style-type: none"> <li>Added Locations tab slide</li> <li>Changed Scheduling tab to show Locations tab</li> <li>Updated all nav bars for location manager</li> <li>Updated screen shots to show Recipient Check In component</li> </ul>	Kristin Clark
7	4/15/2021	<ul style="list-style-type: none"> <li>Updated Recipient screenshot to include e-mail search and Vaccine Product Name</li> <li>Updated Appointments screenshot to include Cancellation status</li> <li>Added “confirmation code” to text to Appointments search</li> <li>Updated Switch Locations screenshot to include current navigation bar</li> </ul>	Darrell Lee
8	6/15/2021	<ul style="list-style-type: none"> <li>Added Confidentiality Agreement at first login slide</li> <li>Added Vaccine Marketplace Overview</li> <li>Added Files Tab Overview</li> <li>Updated screenshots to reflect Vaccine Marketplace Tab</li> </ul>	Darrell Lee
9	6/28/2021	<ul style="list-style-type: none"> <li>Added chatbot/Vaccine Virtual Agent slides</li> <li>Updated branding from MySpot.NC.gov to Vaccines.gov</li> </ul>	Darrell E. Lee

# User Guide Change Log

Version	Date of Change	Changes Made	Author
10	07/28/2021	<ul style="list-style-type: none"> <li>• New consolidated version</li> <li>• Added Accessing Reports to the User Guide</li> </ul>	Vanessa Kemajou Darrell Lee
11	09/01/2021	<ul style="list-style-type: none"> <li>• 38 – Listed additional reports</li> </ul>	Darrell Lee
12	09/14/2021	<ul style="list-style-type: none"> <li>• Help desk hours updated</li> </ul>	Kaitlin Gates
13	12/17/2021	<ul style="list-style-type: none"> <li>• 2: Help Desk name updated to “NC Vaccines Help Desk”</li> <li>• 11, 12, 13, 15, 17, 55: Updated screenshots/text to reflect change to “Select Location”</li> <li>• Updated Outdated Screenshots</li> <li>• Updated Section Titles and Divider Slides</li> <li>• Updated Text on Slides 10 &amp; 12</li> </ul>	Niya Nelson Darrell Lee