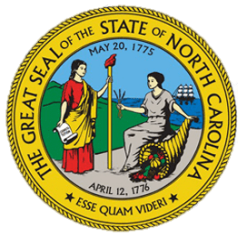


# North Carolina COVID-19 Vaccine Management System

## CVMS Healthcare Provider (HCP) User Onboarding Template User Guide

Version 6

February 12, 2021



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the  
CVMS Help Desk Portal\* at  
[https://ncgov.servicenow.services.com/csm\\_vaccine](https://ncgov.servicenow.services.com/csm_vaccine)

\* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

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

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code  
*NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)  
For providers who may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021*
3. You will receive an e-mail with your username and temporary password to log into the portal

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# CVMS Provider Portal Access Process Overview

# Overview

## CVMS Provider Enrollment Portal



NCDHHS opens the process to Healthcare Providers to complete the application and agreements in order to be eligible to receive and administer COVID-19 vaccines from the specified Provider location(s).

## CVMS Provider Portal



Upon approval through the Provider Enrollment process, Healthcare Provider will be able to add CVMS users to manage COVID-19 vaccine inventory, check-in recipients, and document the administration of COVID-19 vaccines.

## CVMS Organization Portal



Selected non-healthcare provider organization can be invited to register and then upload eligible recipients so these recipients are invited to register in the CVMS Recipient Portal to receive the COVID-19 vaccine.

## CVMS Recipient Portal



COVID-19 vaccine recipients are currently invited to register as identified by their Healthcare Provider and Non-Healthcare Provider organizations. Recipients will complete a health questionnaire in the CVMS Recipient Portal and be notified of their Priority Tier and Eligibility Status.

As a Healthcare Provider, you will need to submit Healthcare Providers and employees within your organization who will be managing and administering COVID-19 vaccines. This process will grant these individuals access to the CVMS Provider Portal. When completing an HCP User Onboarding Template, you will typically focus on the following core areas:

1. Completing the HCP User Onboarding Template
2. Correcting File Errors

The HCP User Onboarding Template is typically completed and submitted by the **Organization Administrator** or the **Vaccine Coordinator**. Providers can also be added to the CVMS Provider Portal via the **Account Management** tab. Only one provider can be added at a time. Therefore, the HCP User Onboarding Template will be used for bulk upload to the CVMS Provider Portal.

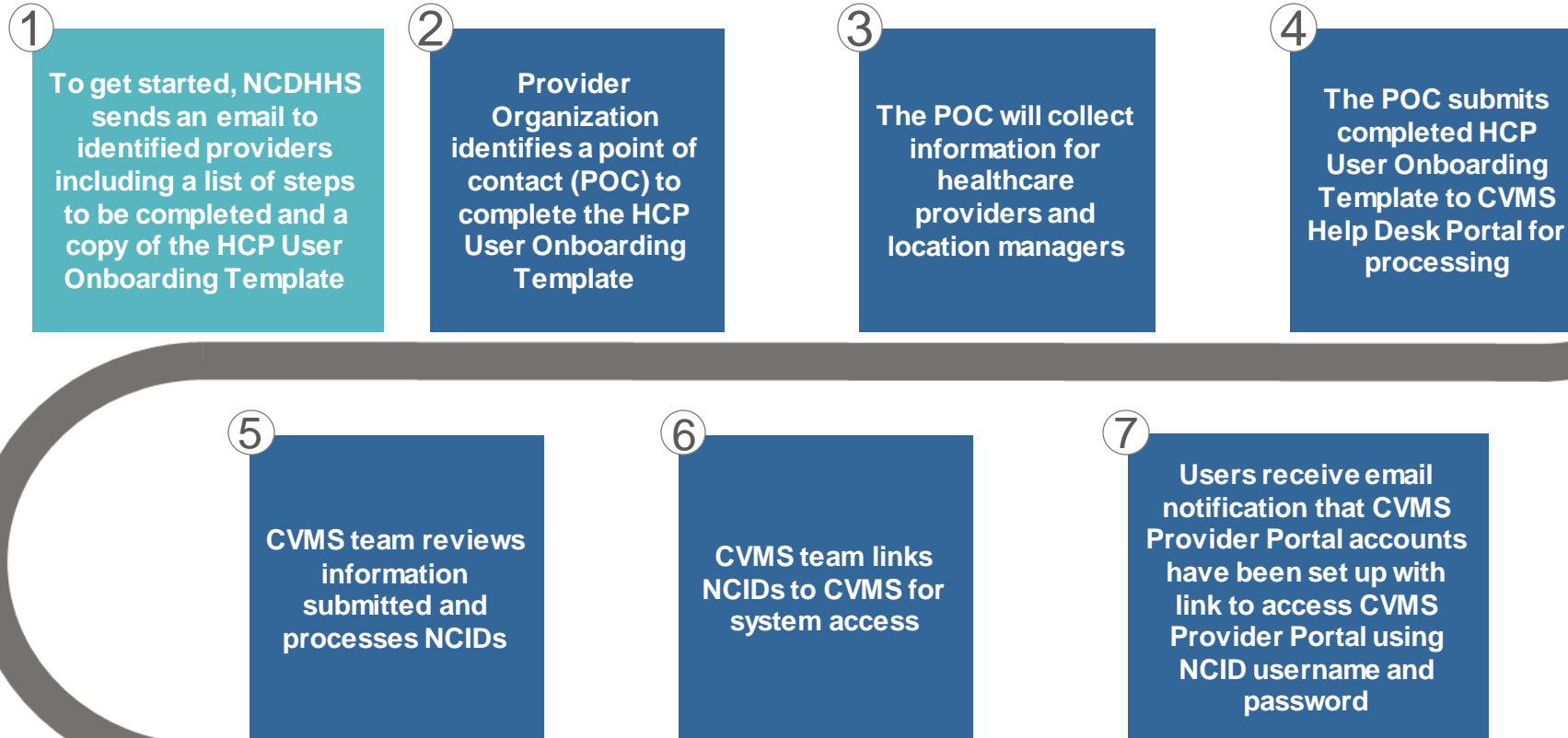
*And lastly, you will need to:*

- Log into the CVMS Help Desk Portal:  
[https://ncgov.servicenow.com/csm\\_vaccine](https://ncgov.servicenow.com/csm_vaccine)

**Now, let's get started!**

# CVMS Provider Portal Onboarding Overview

The Vaccine Coordinator (or similar role within your organization) **can complete the HCP User Onboarding Template for individuals that will need access to the CVMS Provider Portal** to manage inventory and enter vaccine administration details.



## Tips

If a Healthcare Location Manager already has access to the CVMS Provider Portal, they can connect to the CVMS Provider Portal, select Account Management, and create accesses for new users directly.

# Terminology



## Onboarding

“Onboarding” is the process of granting system access to healthcare providers to the CVMS Healthcare Provider Portal. Only provider organizations and locations that have been approved through the CVMS Provider Enrollment Portal are eligible to begin onboarding.



## Location

The Healthcare Provider location where vaccines will be shipped to and Healthcare Providers will be administering vaccines. This location must have been approved within Provider Enrollment Portal.



## NCID

North Carolina Identity Management Service (NCID) is a statewide identity and access management web-based application that provides a secure environment for state agency, local government, business, and individual users to log in and gain access to the state's applications.



## Profile

When completing the HCP User Onboarding Template, a Profile will need to be assigned to each user requiring access to the CVMS Provider Portal. There are two User Profiles to choose from: *The Healthcare Provider Profile* and *The Healthcare Location Manager*.

- A *Healthcare Provider* is responsible for Recipient check-in, Recipient eligibility verification, vaccine administration detail capture, and point-of-care Recipient registration.
- A *Healthcare Location Manager* is responsible for viewing, receiving, and adding inventory, viewing orders and shipment details, viewing and updating vaccine inventory levels, managing location inventory, performing Recipient bulk upload, reviewing reports, and additionally – all of the activities that a Healthcare Provider can do.

# Complete the HCP User Onboarding Template



# Step 1 of 10: Save and Rename the File

The **HCP USER ONBOARDING TEMPLATE** can be found on the NC Immunization Branch website at [NC DPH, WCH: Immunization: Providers](#) under Step 2.

Following the naming convention in the template, save and rename the file using the Organization Name and Submission Date of the file.

1. Confirm you have the **HCP USER ONBOARDING TEMPLATE** (named “(Organization) HCP (Date).xlsx”)
2. Rename the file according to the naming convention



(Organization Name) HCP (Date).xlsx



Washington County Health  
Department HCP 12-02-20.xlsx

## Audience

Organization  
Administrator

Vaccine  
Coordinator

Healthcare  
Location  
Manager

## Tips

The template is available on the NC Immunization Branch website at [NC DPH, WCH: Immunization: Providers](#) under Step 2.

# Step 2 of 10: Complete Preparer Information

**COMPLETE THE PREPARER INFORMATION** at the top of the spreadsheet.

1. Enter the organization name. Make sure the name matches what was entered in the CVMS Provider Enrollment Portal
2. Enter your name, email address, title (or role) and phone number

<b>1</b> Organization Name:									
Name of Person Preparing List:			<b>2</b> Email Address:						
Title:			<b>2</b> Phone Number:						
First Name	Last Name	NCID Username	Email Address	Profile	Location Action	Location Name	Location Street Address	Location City	Location Zip Code

## Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

# Step 3 of 10: Add User Data to HCP User Onboarding File

For all Healthcare Providers or Employees who require access to the CVMS Provider Portal, you will need to collect their information.

Enter the following information in the template:

1. Healthcare Provider/Employee first name and last name
2. Healthcare Provider/Employee NCID username and email address used during NCID registration on <https://ncid.nc.gov>

**Note: If users need to be associated with multiple locations, create one line for each location requiring access with the same information in the first 5 columns**

3. For the **PROFILE** field, select from the drop-down menu either “Healthcare Provider” or “Healthcare Location Mgr.” (Healthcare Location Manager).

Organization Name:						
Name of Person Preparing List:		Email Address:				
Title:		Phone Number:				
First Name <b>1</b>	Last Name <b>1</b>	NCID Username <b>2</b>	Email Address <b>2</b>	Profile <b>3</b>	Location Action	Location Name

## Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

## Tips

The email address must be the same email that was used when registering for an NCID.

# Step 4 of 10: Add Locations information

For each user, enter the location details:

1. Location Name (Make sure the name matches what was entered in the CVMS Provider Enrollment Portal)
2. Location Street Address, City, and Zip Code

Profile	Location Name	Location Street Address	Location City	Location Zip Code

**Note: If a user needs to be associated with multiple locations, enter the user’s same details in the first five columns, and the specific location details in the last four columns.**

First Name	Last Name	NCID Username	Email Address	Profile	Location Action	Location Name
Jane	Alpha	JAlpha_QHosp	Jane.Alpha@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 1
John	Beta	JBeta_QHosp	John.Beta@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 1
Doris	Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 1
Patrick	Delta	PDelta_QHosp	Patrick.Delta@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 2
Locelyn	Epsilon	LEpsilon_QHosp	Locelyn.Epsilon@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 2
Doris	Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 2

## Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

## Tips

If a user is operating from multiple locations, create one line in the Excel spreadsheet for each location the user will operate from.

## Step 5 of 10: How to Determine the Correct NCID Username

A **NORTH CAROLINA IDENTITY (NCID)** is required to access certain NCDHHS applications, such as CVMS. If a person does not have an NCID, they must register for one at <https://ncid.nc.gov>.

*For instructions on how to create an NCID, refer to the appendix of this User Guide.*

**Make sure that the First Name, Last Name, and Email Address matches the information used to register for an NCID. Any discrepancy will delay the user from receiving access to CVMS.**

	A	B	C	D	E	F	G	
1	<b>Organization Name:</b>	Quality Hospital						
2	<b>Name of Person Preparing List:</b>	Patricia Omega	<b>Email Address:</b>	pomega@qualityhospital.test				
3	<b>Title:</b>	Organization Administrator	<b>Phone Number:</b>	111-222-3333				
4								
5	First Name	Last Name	NCID Username	Email Address	Profile	Location Action	Location Name	Location St
6	Jane	Alpha	JAlpha_QHosp	Jane.Alpha@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 1	1 main stree
7	John	Beta	JBeta_QHosp	John.Beta@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 1	1 main stree
8	Doris	Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 1	1 main stree
9	Patrick	Delta	PDelta_QHosp	Patrick.Delta@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 2	1 broad way
10	Jocelyn	Epsilon	JEpsilon_QHosp	Jocelyn.Epsilon@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 2	1 broad way
11	Doris	Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 2	1 broad way

### Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

### Tips

The NCID username does not start with NCC\*, as that is the name of the server. When registering for NCIDs, users are recommended to pick a username following first initial + last name format if available.

# Step 6 of 10: How to Determine the Profile of a Provider or Employee

Use the chart below to help identify the appropriate **PROFILE** for each listed employee based on their role and need for access to CVMS functionalities. **THE TWO OPTIONS ARE HEALTHCARE PROVIDER AND HEALTHCARE LOCATION MANAGER.**

**Note: if a user is operating from multiple locations, please select the same profile at each of these locations.**

Profile	Home Tab	Appointment Walk-In	Today's Appointments	Recipient Tab	Vaccine Consent	Vaccination Details (Administer the vaccine)	View Proof of Vaccination	Help & Information	Shipments	Vaccine Inventory (Add Inventory, Waste, Return, Transfer)	Recipient Bulk Registration	Reports
Healthcare Provider	✓	✓	✓	✓	✓	✓	✓	✓				
Healthcare Location Manager	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

	A	B	C	D	E	F	G	
1	<b>Organization Name:</b>	Quality Hospital						
2	<b>Name of Person Preparing List:</b>	Patricia Omega	<b>Email Address:</b>	pomega@qualityhospital.test				
3	<b>Title:</b>	Organization Administrator	<b>Phone Number:</b>	111-222-3333				
4								
	First Name	Last Name	NCID Username	Email Address	Profile	Location Action	Location Name	Location St
6	Jane	Alpha	JAlpha_QHosp	Jane.Alpha@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 1	1 main stree
7	John	Beta	JBeta_QHosp	John.Beta@qualityhospital.test	Healthcare Location Mgr	Add	Quality Hospital Location 1	1 main stree
8	Doris	Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr	Add	Quality Hospital Location 1	1 main stree
9	Patrick	Delta	PDelta_QHosp	Patrick.Delta@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 2	1 broad way
10	Jocelyn	Epsilon	JEpsilon_QHosp	Jocelyn.Epsilon@qualityhospital.test	Healthcare Location Mgr	Add	Quality Hospital Location 2	1 broad way
11	Doris	Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr	Add	Quality Hospital Location 2	1 broad way

## Step 7 of 10: Verify & Save Data to Submit File

You are now ready to **REVIEW ALL REQUIRED HEALTHCARE PROVIDER USER DATA** that you have entered and **SAVE THE FILE FOLLOWING FILE NAMING CONVENTION.**

### *What is the correct file naming convention?*

1. Click the **FILE** button
2. Click **SAVE AS**
3. **ENTER A FILE NAME** using the file naming convention “(Organization Name) HCP (Date)”
4. Click **SAVE**



A screenshot of a software interface's 'Save As' dialog box. The top text field contains the placeholder '(Organization Name) HCP (Date)'. Below it is a dropdown menu set to 'Excel Workbook (\*.xlsx)'. A 'Save' button with a floppy disk icon is on the right. A red rectangular box highlights the text field.



A screenshot of the same 'Save As' dialog box. The text field now contains 'Washington County Health Dept HCP 12-02-20'. The 'Save' button is highlighted with a red rectangular box.

### Audience

Organization  
Administrator

Vaccine  
Coordinator

Healthcare  
Location  
Manager

### Tips

Following the file naming convention will allow your document to be processed quicker.

# Step 8 of 10: Initiate an HCP User Onboarding User Upload Request

You can now initiate an **HCP ONBOARDING & RECIPIENT BULK UPLOAD REQUEST**.

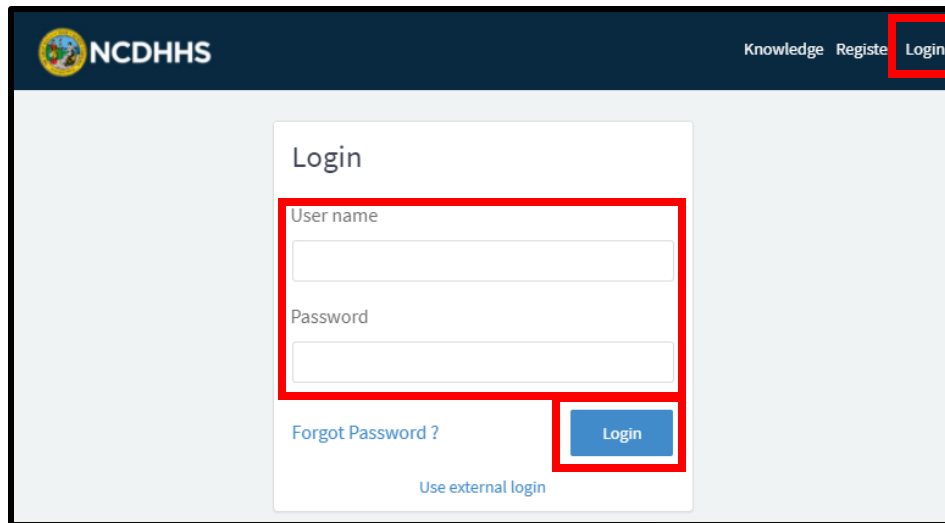
1. Navigate to the CVMS Help Desk Portal at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)
2. Click on **LOGIN** and enter your CVMS Help Desk Portal username and password (please reference slide 2 if you have registration or log in questions)
3. From the Home page, click the **HCP ONBOARDING & RECIPIENT BULK UPLOAD** button
4. After clicking on the request button, select **HCP USER ONBOARDING** from the request type field

## Audience

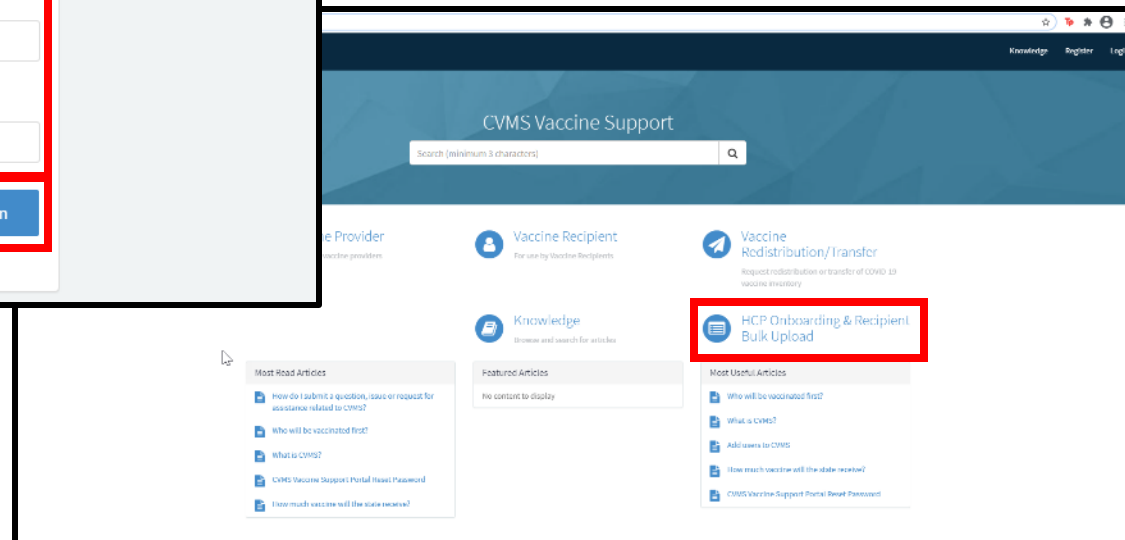
Organization  
Administrator

Vaccine  
Coordinator

Healthcare  
Location  
Manager



The screenshot shows the login page of the CVMS Help Desk Portal. The 'Login' button is highlighted with a red box. The 'User name' and 'Password' input fields are also highlighted with a red box. The page includes a 'Forgot Password?' link and a 'Use external login' option.





# Step 9 of 10: Submit an HCP User Onboarding Request

Healthcare Provider Onboarding and Recipient Bulk Upload

Request Type: HCP User Onboarding

VFC Pin

Organization

Location

Location Street Address

Location City

Location State

Location Zip

Requestor Name: John Smith

Requestor Email Address

Attachment Required: HCP User Onboarding Spreadsheet

Add attachments

Submit

Required information

- VFC Pin
- Organization
- Location
- Location Street Address
- Location City
- Location State
- Location Zip
- Requestor Email Address

1. Complete the fields  
Note: if the template includes multiple locations, select one of the location to fill the VFC PIN and location fields
2. Attach the **HCP USER ONBOARDING FILE** to the request
3. Click the **SUBMIT** button when the form is complete

## Audience

Organization Administrator

Vaccine Coordinator

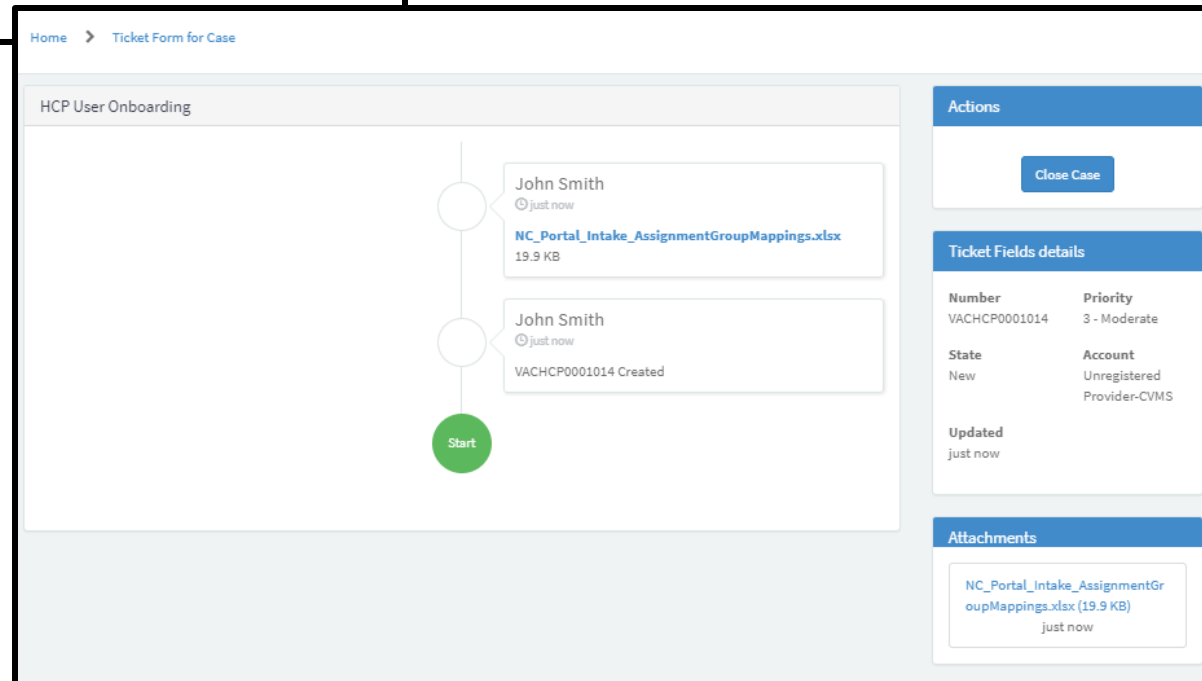
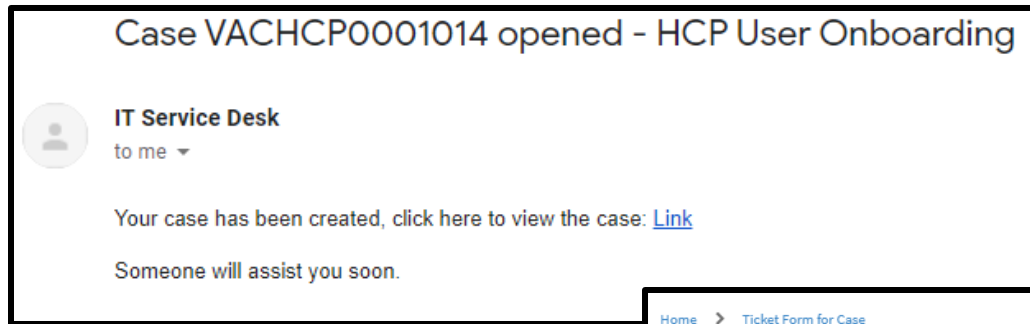
Healthcare Location Manager

## Tips

The VFC PIN is your Provider registration number (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#). For providers who may not have a Provider PIN, you may use the following generic Provider PIN to register:<sup>17</sup> VAC2021.

# Step 10 of 10: Receive an email of confirmation

1. After submitting the file, you will receive a confirmation email with the case number
2. If you click on the link, you will be re-directed to a summary view of the case



## Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

# Add or Remove Locations to Users

# Adding Multiple Locations Per NCID

If a user needs to be associated with multiple locations, enter the user's same details in the first five columns, and the additional location details in the last four columns.

1. In NCID Username, enter the same NCID Username as on the first location
2. In Location Action, select ADD from dropdown menu or enter Add

Quality Hospital								
Patricia Omega	<b>Email Address:</b>	pomega@qualityhospital.test						
Organization Administrator	<b>Phone Number:</b>	111-222-3333						
Last Name	NCID Username	Email Address	Profile	Location Action	Location Name	Location Street Address	Location City	Location Zip Code
Alpha	JAlpha_QHosp	Jane.Alpha@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 1	1 main street	Main City	27000
Beta	JBeta_QHosp	John.Beta@qualityhospital.test	Healthcare Location Mgr	Add	Quality Hospital Location 1	1 main street	Main City	27000
Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr	Add	Quality Hospital Location 1	1 main street	Main City	27000
Delta	PDelta_QHosp	Patrick.Delta@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 2	1 broad way	Central City	27100
Epsilon	JEpsilon_QHosp	Jocelyn.Epsilon@qualityhospital.test	Healthcare Location Mgr	Add	Quality Hospital Location 2	1 broad way	Central City	27100
Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr	Add	Quality Hospital Location 2	1 broad way	Central City	27100

## Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

## Tips

If a user is operating from multiple locations, create one line in the Excel spreadsheet for each location the user will operate from.

# Remove Locations

For each location to remove from a user, enter the location details:

1. In NCID Username, enter the current NCID Username for each listed location
2. In Location Action, select REMOVE from drop down menu or enter Remove
3. Enter the applicable Location Name and Street Address, Location City, and Location Zip Code
4. If all locations linked to a user are removed, the user's access to the CVMS Provider Portal will be revoked

Quality Hospital								
Patricia Omega	<b>Email Address:</b>	pomega@qualityhospital.test						
Organization Administrator	<b>Phone Number:</b>	111-222-3333						
Last Name	NCID Username	Email Address	Profile	Location Action	Location Name	Location Street Address	Location City	Location Zip Code
Alpha	JAlpha_QHosp	Jane.Alpha@qualityhospital.test	Healthcare Provider	Remove	Quality Hospital Location 1	1 main street	Main City	27000
Beta	JBeta_QHosp	John.Beta@qualityhospital.test	Healthcare Location Mgr	Remove	Quality Hospital Location 1	1 main street	Main City	27000
Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr	Remove	Quality Hospital Location 1	1 main street	Main City	27000
Delta	PDelta_QHosp	Patrick.Delta@qualityhospital.test	Healthcare Provider	Remove	Quality Hospital Location 2	1 broad way	Central City	27100
Epsilon	JEpsilon_QHosp	Jocelyn.Epsilon@qualityhospital.test	Healthcare Location Mgr	Remove	Quality Hospital Location 2	1 broad way	Central City	27100
Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr	Remove	Quality Hospital Location 2	1 broad way	Central City	27100

**Note: If a user needs to be dissociated from multiple locations, enter the user's details in the first five columns, and the specific location details in the last four columns.**

## Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

# Changing one User with Multiple NCIDs to a User with a Single NCID for multiple locations

If a user had multiple NCIDs to connect to multiple locations, you can simplify their access by:

1. Remove locations associated to NCID usernames they do not wish to use any longer
2. Add the same locations to the NCID username they wish to keep
3. Do not list the location associated to the NCID username they wish to keep on the template

For example, for a user with 3 NCIDs for 3 locations, you can send a file to remove the 2 NCIDs they do not wish to keep and add 2 locations with the initial NCID username listed for the two locations.

First Name	Last Name	3 NCID Usernames	3 Locations
Jane	White	JWHITE200	Premium hospital Raleigh

Organization Name: Premium Hospital		Version 4 - 2/8/2021							
Name of Person Preparing List: Jeanine Montaigu	Email Address: jmontaigu@premium-hosp.org								
Title: Director	Phone Number:								
First Name	Last Name	NCID Username	Email Address	Profile	Action	Location Name	Location Street Address	Location City	Location Zip Code
Jane	White	JWHITE300	jane.white@premium-hosp.org	Healthcare Provider	Remove	Premium hospital Chapel Hill	1, broad street	Chapel Hill	27900
Jane	White	JWHITE400	jane.white@premium-hosp.org	Healthcare Provider	Remove	Premium hospital Durham	1, large avenue	Durham	28000
Jane	White	JWHITE200	jane.white@premium-hosp.org	Healthcare Provider	Add	Premium hospital Chapel Hill	1, broad street	Chapel Hill	27900
Jane	White	JWHITE200	jane.white@premium-hosp.org	Healthcare Provider	Add	Premium hospital Durham	1, large avenue	Durham	28000

From now on, Jane White will be associated to the 3 locations using the same NCID username JWHITE200.

## Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

# View and Re-Submit File Errors

# Step 1 of 4: Receive Notification with File Errors

While processing your HCP User Onboarding Template, the team may encounter issues or errors within the file. If any employees or individuals included in your **HCP USER ONBOARDING TEMPLATE FAILED, YOU WILL RECEIVE AN EMAIL NOTIFICATION FROM CVMS HELP DESK PORTAL ([ncgov@servicenowservices.com](mailto:ncgov@servicenowservices.com))**.

The attachment included with your case will **CONTAIN THE FAILED RECORDS** in the same HCP User Onboarding Template format. It will also include the **CELLS HIGHLIGHTED IN RED THAT NEED TO BE CORRECTED** or cells highlighted in yellow that have been corrected.

1. Open the email notification
2. Click on the link in the email to view your case in your browser. In addition, review any comments from the IT Service Desk agent.
3. When viewing your case, reference the Attachments section on the right for another file with “\_ERROR.xlsx” appended to end of the filename.

The screenshot shows a case page with the following sections:

- Agent working on this CVMS Vaccine:**

Agent Name	
Number	VACCS0005080
State	Resolved
Priority	3 - Moderate
Created	11d ago
Updated	5h ago
- Set up Google Maps API** (button)
- Attachments** (section header with paperclip icon)
  - NCID state list - HCA-Mission 12.28.2020.xlsx (337.8 KB)** (file name)
    - 11d ago (timestamp)
    - edit and delete icons

## Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager



## Step 2 of 4: Fix File Errors

Inside the attachment is a list of all employees or individual recipients who failed to load into the system.

*No successfully loaded individuals will be included in this list.*

1. In the Excel file attached, look for cells colored in **YELLOW** and **RED**
2. Use the email body to identify the issue and **CORRECT THE DATA IN THE SAME SHEET**

### Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

### Tips

Refer to the cells colored in red in the Excel to correct individual data.

	A	B	C	D	E	F	G	H	I	J
1	<b>Organization Name:</b>	Quality Hospital								
2	<b>Name of Person Preparing List:</b>	Patricia Omega	<b>Email Address:</b>	pomega@qualityhospital.test						
3	<b>Title:</b>	Organization Administrator	<b>Phone Number:</b>	111-222-3333						
4										
	First Name	Last Name	NCID Username	Email Address	Profile	Location Action	Location Name	Location Street Address	Location City	Location Zip Code
6	Jane	Alpha	JAlpha_QHosp	Jane.Alpha@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 1	1 main street	Main City	27000
7	John	Beta	JBeta_QHosp	John.Beta@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 1	1 main street	Main City	27000
8	Doris	Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 1	1 main street	Main City	27000
9	Patrick	Delta	PDelta_QHosp	Patrick.Delta@qualityhospital.test	Healthcare Provider	Add	Quality Hospital Location 2	1 broad way	Central City	27100
10	Jocelyn	Epsilon	JEpsilon_QHosp	Jocelyn.Epsilon@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 2	1 broad way	Central City	27100
11	Doris	Gamma	DGamma_QHosp	Doris.Gamma@qualityhospital.test	Healthcare Location Mgr.	Add	Quality Hospital Location 2	1 broad way	Central City	27100

## Step 3 of 4: Fix File Errors – Potential Reasons for Failure

There are a few reasons why an individual record may fail – from blank fields to invalid data formats.

### Potential Error Reasons:

Error	Cell Color	Corrective Action Needed
Incorrect NCID	Yellow	Original NCID submitted was incorrect, however, we were able to identify the correct NCID and updated it in the form. <b><u>Please communicate the correct NCID to your employee as they will need this information when logging into the CVMS Provider Portal.</u></b>
Incorrect NCID	Red	Double check with the individual that the NCID username is correct and is not associated with another user. If the NCID username is valid, check that the individual has completed the NCID registration process. Follow all steps within the NCDHHS NCID Registration User Guide documentation.
Missing or incorrect profile	Red	Select Profile type from the drop-down in column E.
Duplicate email	Red	An email address can only be associated with a single person. Please update the records to have unique email addresses.

### Audience

Organization  
Administrator

Vaccine  
Coordinator

Healthcare  
Location  
Manager

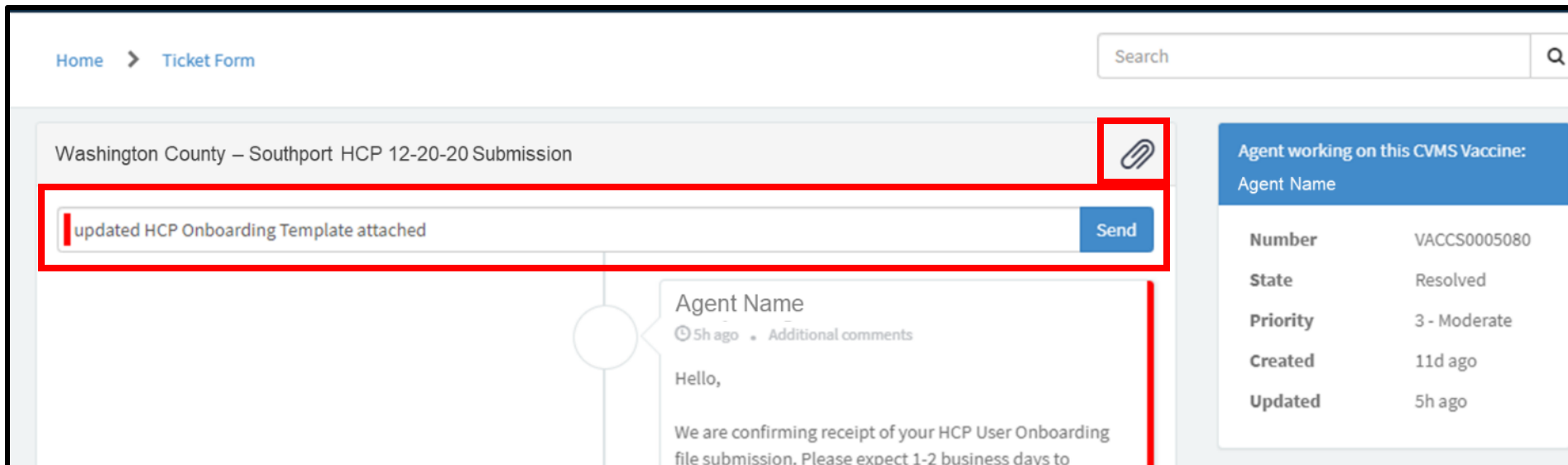
### Tips

Refer to this slide when correcting file errors.

## Step 4 of 4: Save and Re-Submit File

Once you reviewed and corrected any recipient data errors, you are ready to **RE-SUBMIT THE UPDATED FILE**.

1. On the same sheet with errors colored in red, take the **CORRECTIVE ACTIONS** in order to fix the errors
2. Change the cell from **RED** to **GREEN**
3. **SAVE** the file following the **NAMING CONVENTION** with the new date of submission, if applicable
4. Go to your ticket on the CVMS Help Desk Portal and **ATTACH THE UPDATED FILE** by clicking on the paperclip icon and click **SEND**



Home > Ticket Form

Search

Washington County – Southport HCP 12-20-20 Submission

updated HCP Onboarding Template attached **Send**

Agent Name  
5h ago • Additional comments

Hello,

We are confirming receipt of your HCP User Onboarding file submission. Please expect 1-2 business days to

Agent working on this CVMS Vaccine:  
Agent Name

Number	VACCS0005080
State	Resolved
Priority	3 - Moderate
Created	11d ago
Updated	5h ago

### Audience

Organization Administrator

Vaccine Coordinator

Healthcare Location Manager

### Tips

Please be sure to change shading of corrected cells from red to green.

# CVMS Provider Portal Notification

# The CVMS Provider Portal Email Notification

Once successfully loaded into the CVMS Provider Portal, an **EMAIL NOTIFICATION** will be sent to each CVMS User.

**The email will come from:** Vaccine Provider at [nccvms@dhhs.nc.gov](mailto:nccvms@dhhs.nc.gov)

**Email Subject:** *Welcome to the COVID-19 Vaccine Management System (CVMS)*

The email will allow CVMS Users to complete registration to the CVMS Provider Portal.

Please inform your CVMS Users that they **MUST COMPLETE ACCOUNT REGISTRATION TO THE CVMS PROVIDER PORTAL TO ACCESS CVMS.**



## Audience

Healthcare  
Location  
Manager

Healthcare  
Provider

## Tips

The CVMS Provider Portal uses NCID for secure access management.

*To learn more about how to set up a NCID Username, please refer to the Appendix of this User Guide.*

# Appendix

# Some additional things you can do right now to get ready!

Below are some of the key actions you can take right now to prepare for CVMS and administering the COVID-19 vaccine.

- Identify an **internal single point of contact for your employees** to send questions or provide feedback related to the administration of COVID-19 vaccine.
- Identify your organization's **users that need access to CVMS and confirm that these users have a valid NCID**. Instruct users that do not have an NCID to create an NCID and provide it to you. **Complete the HCP User Onboarding Template.**
- **Fill out the State-provided Recipient Bulk Upload Template** with the requested information for each of your eligible employees or individuals that meet Eligibility criteria to receive the COVID-19 vaccine.
- Provide orientation and training materials to your organization's designated primary and back-up vaccine coordinators.
- **Train your staff that are designated to use CVMS** for receiving COVID-19 vaccines, managing inventory levels, checking-in recipients prior to receiving the vaccine, and documenting vaccine administration on how to use the tool (*see schedule on previous slide*).
- **Train designated staff on appropriate handling, storing, and administration of the COVID-19 vaccines.**
- **Obtain a copy of the Emergency Use Authorization (EAU) Fact Sheet for each COVID-19 vaccine product** your organization receives and establish a process to **provide a printed copy of this document to each recipient** prior to administration of the vaccine.
- **Train designated vaccine administrators on how to report an adverse event in VAERS following a COVID-19 vaccine administration.**

This checklist contains recommended action items to help organizations ensure their readiness to receive and administer the COVID-19 vaccine. Providers must be approved through the CVMS Provider Enrollment Portal before beginning the readiness checklist. The State will contact providers for enrollment in accordance with the Vaccine Distribution Prioritization framework. Please visit the NCDHHS COVID-19 website for further information: <https://covid19.ncdhhs.gov/vaccines>.

The action items below are grouped by topic (Onboarding, Training, Communications and Vaccine Administration Preparation) and listed in recommended sequence to address. Action items that are shaded blue are only applicable to Health Care Provider (HCP) organizations that are enrolled with the State of North Carolina to administer COVID-19 vaccines.

Supporting reference materials can be found in the Appendix beginning on page 12.

Please go to the COVID-19 Vaccine Management System (CVMS) Help Desk Portal at [https://ncgov.servicenow.com/csm\\_vaccine](https://ncgov.servicenow.com/csm_vaccine) to submit any questions related to this Readiness Checklist.

**Onboarding:**

✓	Action Item	Supporting Information
<input type="checkbox"/>	1. Identify internal single point of contact for your employees to send questions or provide feedback related to the administration of COVID-19 vaccine.	Identifying and providing employees a point of contact within your organization will give employees a clear channel to get answers to their questions or communicate issues related to the COVID-19 vaccination process.  Any questions related to NCID or CVMS access should be directed through the designated point of contact.
<input type="checkbox"/>	2. (Optional) Create an account on the CVMS Help Desk Portal. This site will be used to submit COVID-19 vaccine questions as well as the HCP User Onboarding and Recipient Bulk Upload Templates.	If you have any questions, issues or requests, please open a case and submit on the CVMS Help Desk Portal at <a href="https://ncgov.servicenow.com/csm_vaccine">https://ncgov.servicenow.com/csm_vaccine</a> . You will need to register for an account in order to submit a request: <ol style="list-style-type: none"><li>1. Register for an account on the website by clicking "Register" in the top right corner.</li><li>2. Populate your first name, last name, business email, and your registration</li></ol>

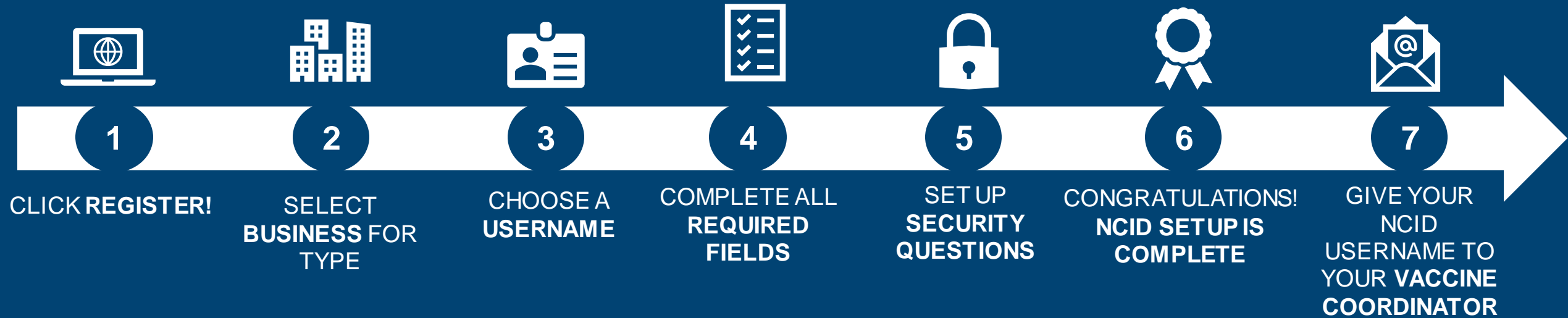
<ol style="list-style-type: none"><li>a. Freezer must hold vaccine at a temperature of -80°C to -60°C (-112°F to -76°F)</li><li>b. Use a Digital Data Logger (DDL) for temperature monitoring</li><li>c. For accurate ultra-cold temperature monitoring, it is essential to use an air-probe as opposed to pure propylene glycol</li><li>d. Ensure the DDL has an alarm for out of range temperatures, low battery alarm, and displays current/min/max temperatures</li><li>e. Ensure DDL has current and valid certificate of calibration</li></ol>	
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Go to

[https://immunize.nc.gov/providers/ncip/training/Organiz%20Readiness%20Checklist\\_vFinal.docx](https://immunize.nc.gov/providers/ncip/training/Organiz%20Readiness%20Checklist_vFinal.docx) to find the latest CVMS Readiness Checklist

# Creating a Business NCID

If you do not have a Business NCID, go to <https://NCID.NC.GOV> to start the process!








**What is NCID?** North Carolina Identity Management Service (NCID) is a statewide identity and access management web-based application that provides a secure environment for state agency, local government, business, and individual users to log in and gain access to the state's applications.



# Additional Notes

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## Key Items:

- **Hyperlinks** appear as 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.

## Contact Information:

- All questions should be directed to CVMS Help Desk Portal at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

## Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see [https://help.salesforce.com/articleView?id=getstart\\_browsers\\_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

# User Guide Change Log

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## Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/20/2020	<ul style="list-style-type: none"><li>• Initial document</li></ul>		Sarah Green
2	01/5/2021	<ul style="list-style-type: none"><li>• Transmission of Bulk Upload files was modified</li></ul>	5-26	Cheryl Fang
3	01/18/2021	<ul style="list-style-type: none"><li>• Add CVMS Help Desk Portal steps</li></ul>	16-18	Simon Couderc
4	02/01/2021	<ul style="list-style-type: none"><li>• Updated Onboarding Template</li><li>• Updated NCID Instructions</li><li>• Removed Error</li><li>• Updated Profile Column</li><li>• Updated CVMS Help Desk Portal references</li></ul>	9-15, 20-22	Kechia Scott
5	02/08/2021	<ul style="list-style-type: none"><li>• Updated Onboarding Template</li><li>• Updated Table of Contents</li><li>• Adding Slides Regarding Add and Removing Multiple Locations</li></ul>	3, 9-15, 19-21, 24	Kechia Scott
6	02/12/2021	<ul style="list-style-type: none"><li>• Added Verbiage Regarding Adding Providers Via Account Mgmt Tab</li></ul>	5	Kechia Scott