North Carolina COVID-19 Vaccine Management System

CVMS Healthcare Provider (HCP) User Onboarding Template

Version 4
February 1, 2021
If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at https://ncgov.servicenowservices.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
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.

And lastly, you will need to:
• Log into the CVMS Help Desk Portal: https://ncgov.servicenowservices.com/csm_vaccine

Now, let’s get started!
CVMS Provider Portal Onboarding Overview

The Vaccine Coordinator (or similar role within your organization) **will need to 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.

**Time Estimate**
Process takes 30 minutes to complete (depending on number of employees).

**Key Objectives**
How to complete HCP User Onboarding Template so that users can access the CVMS Provider Portal.

1. To get started, DHHS sends an email to identified providers including a list of steps to be completed and a copy of the HCP User Onboarding Template
2. Provider Organization identifies a point of contact (POC) to complete the HCP User Onboarding Template
3. The POC will collect information for healthcare providers and location managers
4. The POC submits completed HCP User Onboarding Template to CVMS Help Desk Portal for processing
5. CVMS team reviews information submitted and processes NCIDs
6. CVMS team links NCIDs to CVMS for system access
7. Users receive email notification that CVMS Provider Portal accounts have been set up with link to access CVMS Provider Portal using NCID username and password
NCID is a 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.

"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.

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.

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 https://immunize.nc.gov/providers/ncip/training/(Organization%20Name)%20HCP%20(Date)_01_14_2021.xlsx.

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**

**Tips**

The template is available on the NC Immunization Branch website: https://immunize.nc.gov/providers/ncip/training/(Organization%20Name)%20HCP%20(Date)_01_14_2021.xlsx
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

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>NCID Username</th>
<th>Email Address</th>
<th>Profile</th>
<th>Location Name</th>
<th>Location Street Address</th>
<th>Location City</th>
<th>Location Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.” (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**

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.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>NCID Username</th>
<th>Email Address</th>
<th>Profile</th>
<th>Location Name</th>
<th>Loc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane</td>
<td>Alpha</td>
<td>JAlpha_QHosp</td>
<td><a href="mailto:Jane.Alpha@qualityhospital.test">Jane.Alpha@qualityhospital.test</a></td>
<td>Healthcare Provider</td>
<td>Quality Hospital Location 1</td>
<td>1 m</td>
</tr>
<tr>
<td>John</td>
<td>Beta</td>
<td>JBeta_QHosp</td>
<td><a href="mailto:John.Beta@qualityhospital.test">John.Beta@qualityhospital.test</a></td>
<td>Healthcare Location Mgr</td>
<td>Quality Hospital Location 1</td>
<td>1 m</td>
</tr>
<tr>
<td>Doris</td>
<td>Gamma</td>
<td>DGamma_QHosp</td>
<td><a href="mailto:Doris.Gamma@qualityhospital.test">Doris.Gamma@qualityhospital.test</a></td>
<td>Healthcare Location Mgr</td>
<td>Quality Hospital Location 1</td>
<td>1 m</td>
</tr>
<tr>
<td>Patrick</td>
<td>Delta</td>
<td>PDelta_QHosp</td>
<td><a href="mailto:Patrick.Delta@qualityhospital.test">Patrick.Delta@qualityhospital.test</a></td>
<td>Healthcare Provider</td>
<td>Quality Hospital Location 2</td>
<td>1 br</td>
</tr>
<tr>
<td>Iocelyn</td>
<td>Epsilon</td>
<td>IEpsilon_QHosp</td>
<td><a href="mailto:Iocelyn.Epsilon@qualityhospital.test">Iocelyn.Epsilon@qualityhospital.test</a></td>
<td>Healthcare Location Mgr</td>
<td>Quality Hospital Location 2</td>
<td>1 br</td>
</tr>
<tr>
<td>Doris</td>
<td>Gamma</td>
<td>DGamma_QHosp</td>
<td><a href="mailto:Doris.Gamma@qualityhospital.test">Doris.Gamma@qualityhospital.test</a></td>
<td>Healthcare Location Mgr</td>
<td>Quality Hospital Location 2</td>
<td>1 br</td>
</tr>
</tbody>
</table>

Tips
If a user is operating from multiple locations, create one line in the Excel spreadsheet for each location the user will operate from.
A NORTH CAROLINA IDENTITY (NCID) is required to access certain NC DHHS applications, such as CVMS. If a person does not have an NCID, they must register for one at [https://ncid.nc.gov](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.

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.

<table>
<thead>
<tr>
<th>Profile</th>
<th>Home Tab</th>
<th>Appointment Walk-In</th>
<th>Today’s Appointments</th>
<th>Recipient Tab</th>
<th>Vaccine Consent</th>
<th>Vaccination Details (Administer the vaccine)</th>
<th>View Proof of Vaccination</th>
<th>Help &amp; Information</th>
<th>Shipments</th>
<th>Vaccine Inventory (Add Inventory, Waste, Return, Transfer)</th>
<th>Recipient Bulk Registration</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare Provider</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Healthcare Location Manager</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

![Spreadsheet Image](image-url)
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

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
1. After clicking on the request button, select **HCP USER ONBOARDING** from the request type field.

2. Complete the fields
   
   Note: if the template includes multiple locations, select one of the location to fill the VFC PIN and location fields

3. Attach the **HCP USER ONBOARDING FILE** to the request

4. Click the **SUBMIT** button when the form is complete

**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: 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
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 FULLIED, YOU WILL RECEIVE AN EMAIL NOTIFICATION FROM CVMS HELP DESK PORTAL** (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.
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**

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**Tips**

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

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**Organization Administrator**

**Vaccine Coordinator**
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:

<table>
<thead>
<tr>
<th>Error</th>
<th>Cell Color</th>
<th>Corrective Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorrect NCID</td>
<td>Yellow</td>
<td>Original NCID submitted was incorrect, however, we were able to identify the correct NCID and updated it in the form. <strong>Please communicate the correct NCID to your employee as they will need this information when logging into the CVMS Provider Portal.</strong></td>
</tr>
<tr>
<td>Incorrect NCID</td>
<td>Red</td>
<td>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 NC DHHS NCID Registration User Guide documentation.</td>
</tr>
<tr>
<td>Missing or incorrect profile</td>
<td>Red</td>
<td>Select Profile type from the drop-down in column E.</td>
</tr>
<tr>
<td>Duplicate email</td>
<td>Red</td>
<td>An email address can only be associated with a single person. Please update the records to have unique email addresses.</td>
</tr>
</tbody>
</table>
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**

**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

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.

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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.

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Audience

Healthcare Location Manager

Healthcare Provider
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.

Go to https://immunize.nc.gov/providers/ncip/training/Organization%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](https://NCID.NC.GOV) to start the process!

What is NCID? NCID is a 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

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

**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

<table>
<thead>
<tr>
<th>Version</th>
<th>Date of Change</th>
<th>Changes Made</th>
<th>Impacted Slides</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>12/20/2020</td>
<td>• Initial document</td>
<td></td>
<td>Sarah Green</td>
</tr>
<tr>
<td>2</td>
<td>01/5/2021</td>
<td>• Transmission of Bulk Upload files was modified</td>
<td>5-26</td>
<td>Cheryl Fang</td>
</tr>
<tr>
<td>3</td>
<td>01/18/2021</td>
<td>• Add CVMS Help Desk Portal steps</td>
<td>16-18</td>
<td>Simon Couderc</td>
</tr>
<tr>
<td>4</td>
<td>02/01/2021</td>
<td>• Updated Onboarding Template</td>
<td>9-15, 20-22</td>
<td>Kechia Scott</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Updated NCID Instructions</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>• Updated Error</td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>• Updated Profile Column</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>• Updated CVMS Help Desk Portal references</td>
<td></td>
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</table>