North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Inventory Wastage, Return & Redistribution/Transfer User Guide

Version 6

January 27, 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.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 are not enrolled or 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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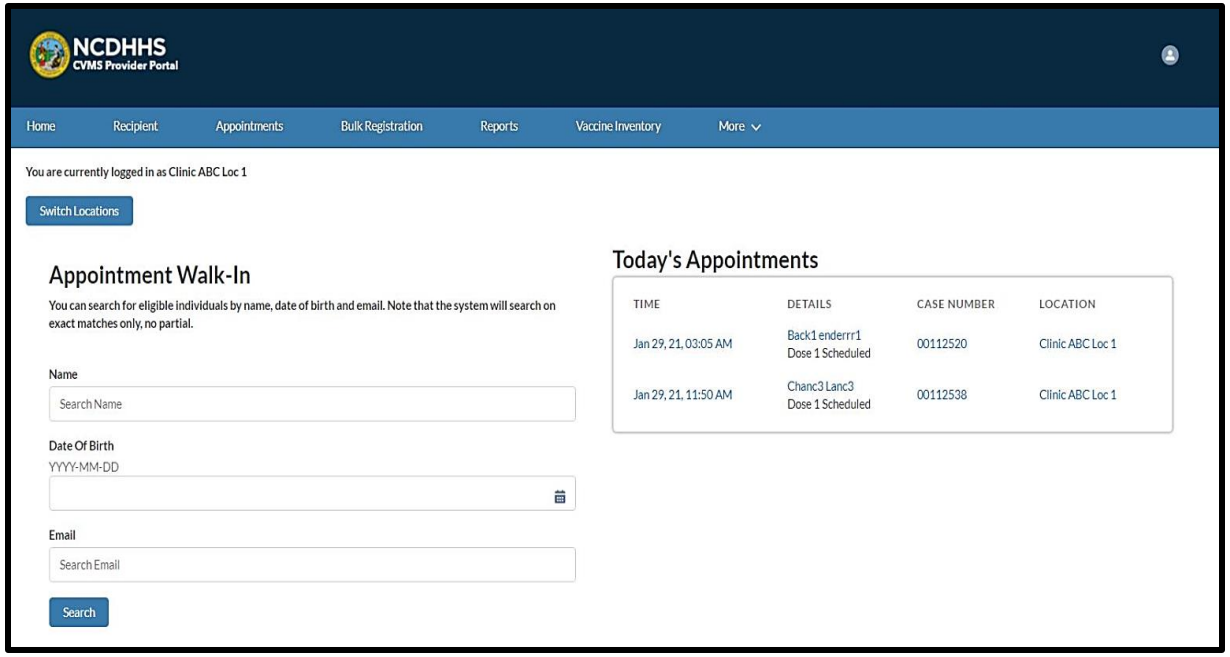
Vaccine Wastage, Returns & Redistributions/Transfers Process Overview

Overview



To share an accurate picture of the inventories at your disposal with the state through CVMS, you will need to update the CVMS Provider portal with COVID-19 vaccine inventory reductions, or deprecations. These actions typically involve:

1. Documenting COVID-19 vaccine Wastage,
2. Returning COVID-19 vaccine to the manufacturer, and
3. Understanding the COVID-19 vaccine redistribution or transfer processes

The processes discussed in this training guide are primarily for the **Healthcare Location Managers** profile.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari (Internet Explorer or Edge non-Chromium are not supported)
- Log into the CVMS Provider portal at https://covid-vaccine-provider-portal.ncdhhs.gov using your NCID username and password.

Now, let's get started!

Key Terms

Wastage	Wastage is the sum of COVID-19 vaccines discarded, lost, damaged or destroyed.
Return	Return is the sum of COVID-19 vaccines that have been sent back to the manufacturer.
Spoilage	Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.
Vaccine Deprecation	Vaccine Deprecation represents the process in which the amount of COVID-19 vaccines is reduced by the amount of COVID-19 vaccines administrated, wasted, or returned.
Vaccine Inventory Shipment Details	Vaccine Inventory Shipment Details may include manufacturer name, lot number, serial number, and National Drug Code (NDC).
Redistribution	Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.
Transfer	Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

When to declare in CVMS a COVID-19 Vaccine Inventory Deprecation

When a COVID-19 vaccine is wasted

Healthcare Location Manager accesses the Vaccine Wastage Survey Form, providing reason for waste and other applicable information.

Once submitted, the Healthcare Provider Location's Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.

When a COVID-19 vaccine is to be returned to manufacturer

Healthcare Location Manager accesses the Vaccine Return Survey Form, providing reason for return and other applicable information.

Once submitted, the Healthcare Provider Location's Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.

When a COVID-19 vaccine is to be redistributed/transferred to another provider location

Healthcare Location Manager complete a COVID-19 Vaccine Redistribution/Transfer Request Form, with details such as Primary Location Secondary Location, lot number, and quantity to redistribute/transfer. Completed forms are submitted to the NC Immunization Brand through the at the CVMS Help Desk Portal: https://ncgov.servicenowservices.com/csm_vaccine

If approved, The NC Immunization Branch will initiate the redistribution/transfer in CVMS. The approved redistribution/transfer is reflected as an order for the Secondary Location.

The COVID-19 Vaccine On Hand inventory of the sending location is decreased. The receiving location has a COVID-19 Vaccine Inventory record auto-created, but the quantity is noted as "in transit".

Secondary Location completes "Inbound Redistribution/Transfer" process, and the quantity is changed from "in transit" to "available".

Log a COVID-19 Vaccine Wastage

Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 vaccine inventory management guidelines, you will want to document **ALL CASES** of **COVID-19 VACCINE WASTAGE** in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Wastage will also help you maintain an accurate view of COVID-19 vaccine inventory levels for the location(s) that you support.

Remember, examples of COVID-19 Vaccine Wastage include breaking vial/syringe and lost COVID-19 vaccines.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**

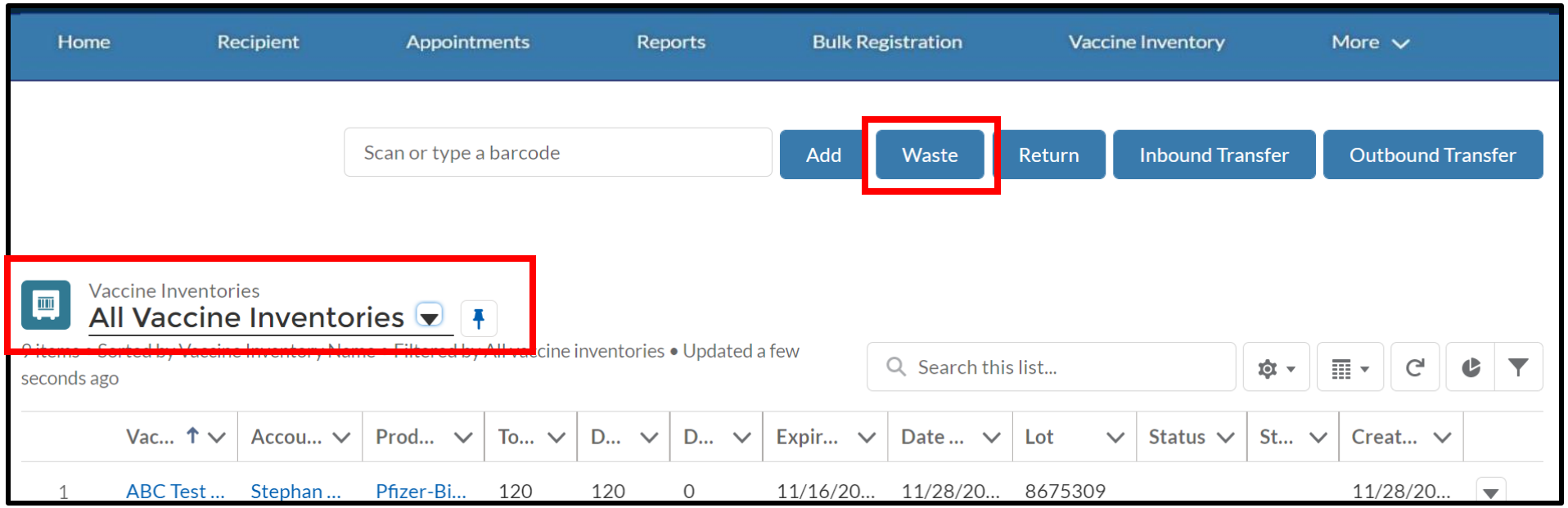
Audience

Healthcare Location Manager

Step 2 of 5: Open the Vaccine Wastage Survey form

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. The **ALL VACCINES LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine Inventory records.

1. Click **WASTE** at the top of the page
2. After clicking **WASTE**, you will be directed to the **VACCINE WASTAGE SURVEY FORM**



Audience

Healthcare Location Manager

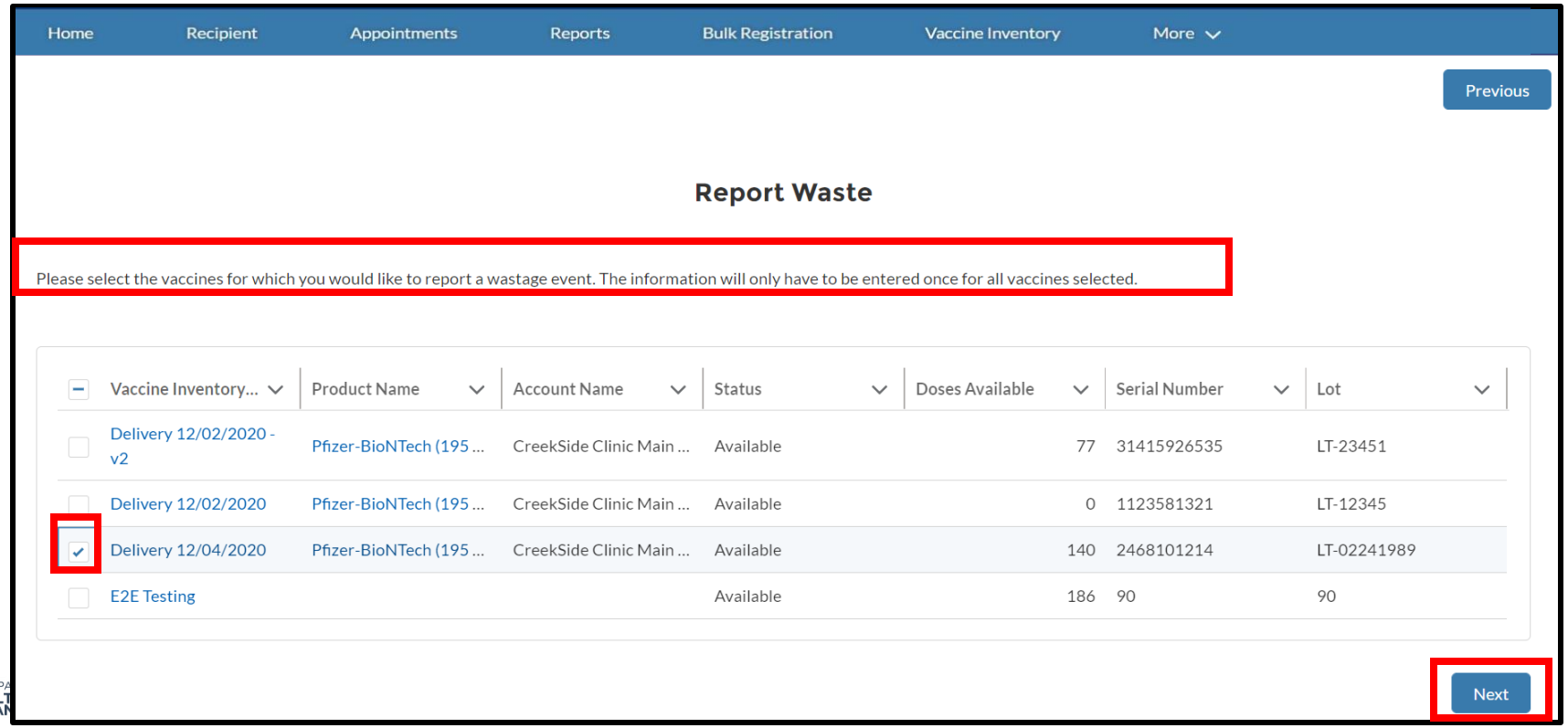
Tips

To see more details for a specific Vaccine Inventory record, click the Vaccine Inventory Hyperlink.

Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory records to report waste. At the bottom, you will see **ALL WASTAGE EVENTS** displaying all previously recorded COVID-19 vaccine inventory waste.

1. Check the **BOX** for the **APPROPRIATE ROW(S)**
2. Click **NEXT** at the bottom of the page
3. After clicking **NEXT**, you will see the **VACCINE WASTAGE SURVEY FORM**



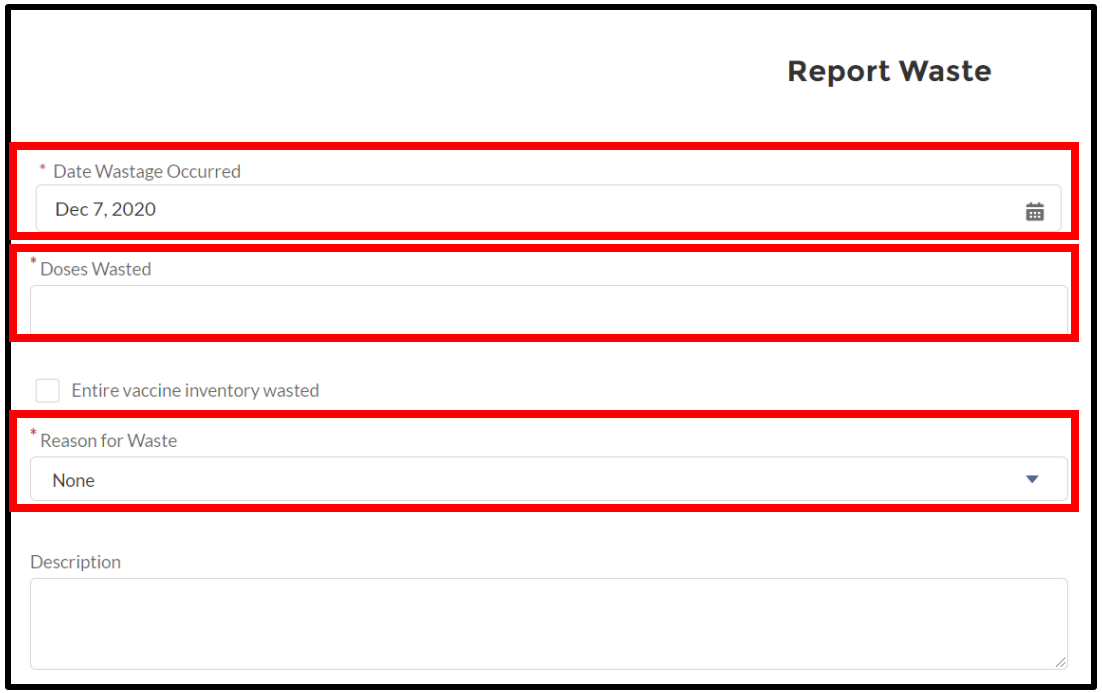
Audience

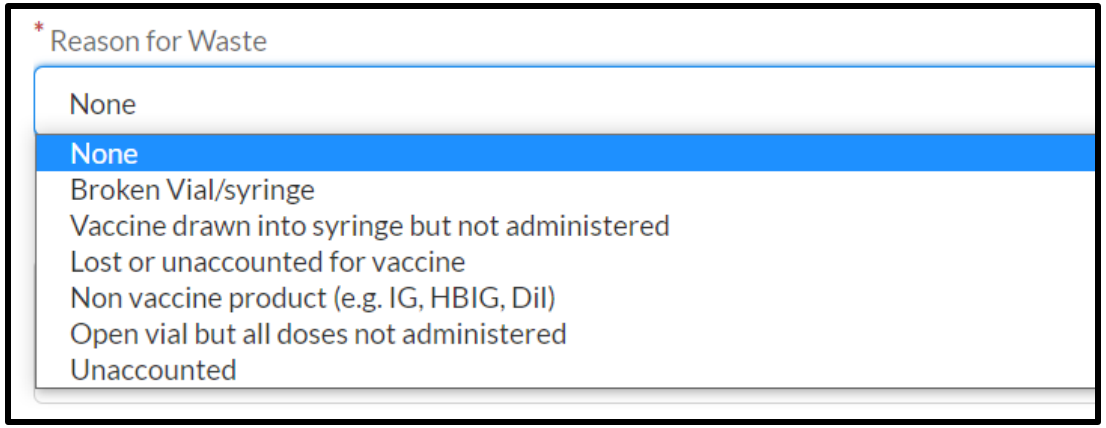
Healthcare Location Manager

Tips

You will be able to report a Partial or Full Vaccine shipment wastage on the next page.

Step 4 of 5: Complete the Vaccine Wastage Survey form





1. Populate the required **REPORT WASTE FIELDS:**
    1. Date Wastage Occurred
    2. Doses Wasted
    3. If you want to report the entire Vaccine Inventory wasted, check the Entire Vaccine Inventory Wasted Checkbox.
    4. Reason for Waste
2. You may populate the **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once you are ready to submit the form, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

Audience

Healthcare Location Manager

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Step 5 of 5: Submit the Vaccine Wastage Survey form

The **VACCINE WASTAGE RECORD** is now submitted, and your COVID-19 vaccine inventory will be automatically updated.

1. Click **FINISH**
2. After clicking **FINISH**, you will be directed back to the **INITIAL VACCINE WASTAGE SURVEY FORM PAGE**

Audience

Healthcare Location Manager

Tips

After clicking **FINISH**, you will see your Vaccine Wastage record displayed on the All Wastage List View.

Return COVID-19 Vaccines to Manufacturer

Step 1 of 5: Navigate to the Vaccine Inventory tab

To maintain an accurate view of your location's COVID-19 vaccine inventory levels, you will want to track inventory that is **RETURNED TO THE MANUFACTURER.** This system process is intended **ONLY** for the purpose of maintaining an accurate count of your COVID-19 vaccine levels.

It is **NOT** meant to track shipping details, storage details, or any other information related to returning COVID-19 vaccine inventory to the manufacturer.

Remember, examples of COVID-19 Vaccine Returns / Spoilage include improper storage conditions and expired COVID-19 vaccines.

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**

Audience

Healthcare Location Manager

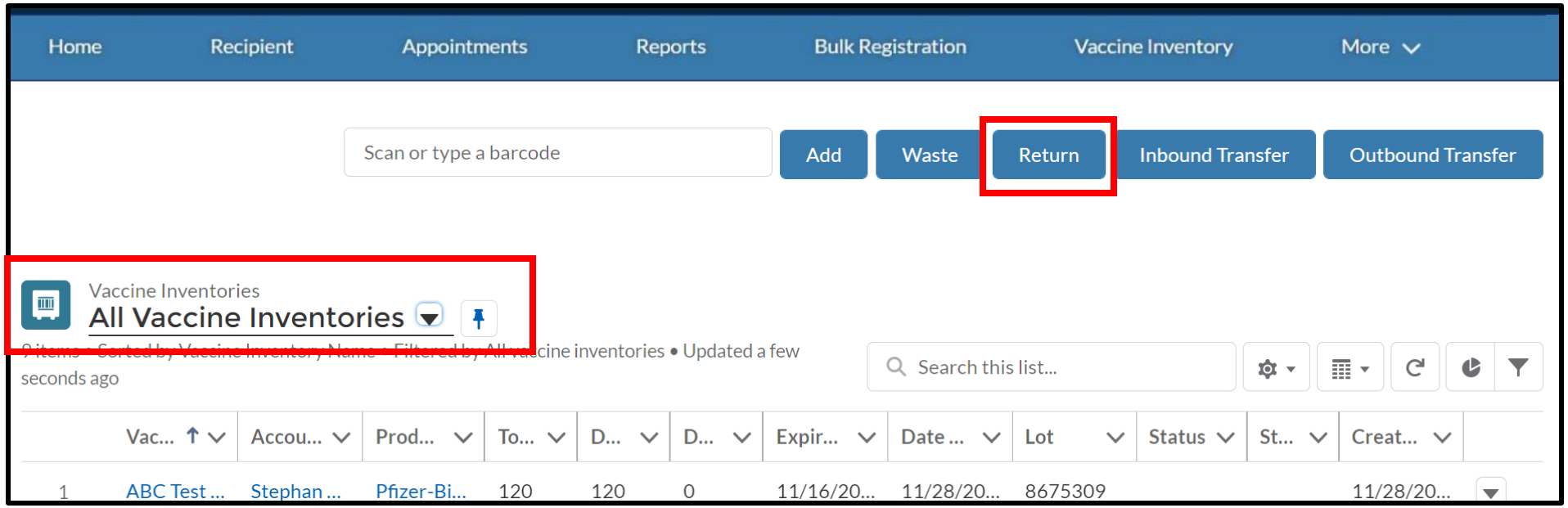
Tips

If you have ADDITIONAL QUESTIONS around the return to manufacturer process, please reach out to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Step 2 of 5: Open the Vaccine Return Survey form

At the top of the page, there are different actions you can take to manage COVID-19 vaccine inventory. The **ALL VACCINES LIST VIEW** will be displayed by default to help you review your COVID-19 vaccine inventory.

1. Click **RETURN**
2. After clicking **RETURN**, you will be directed to the **VACCINE RETURN SURVEY FORM**



Audience

Healthcare Location Manager

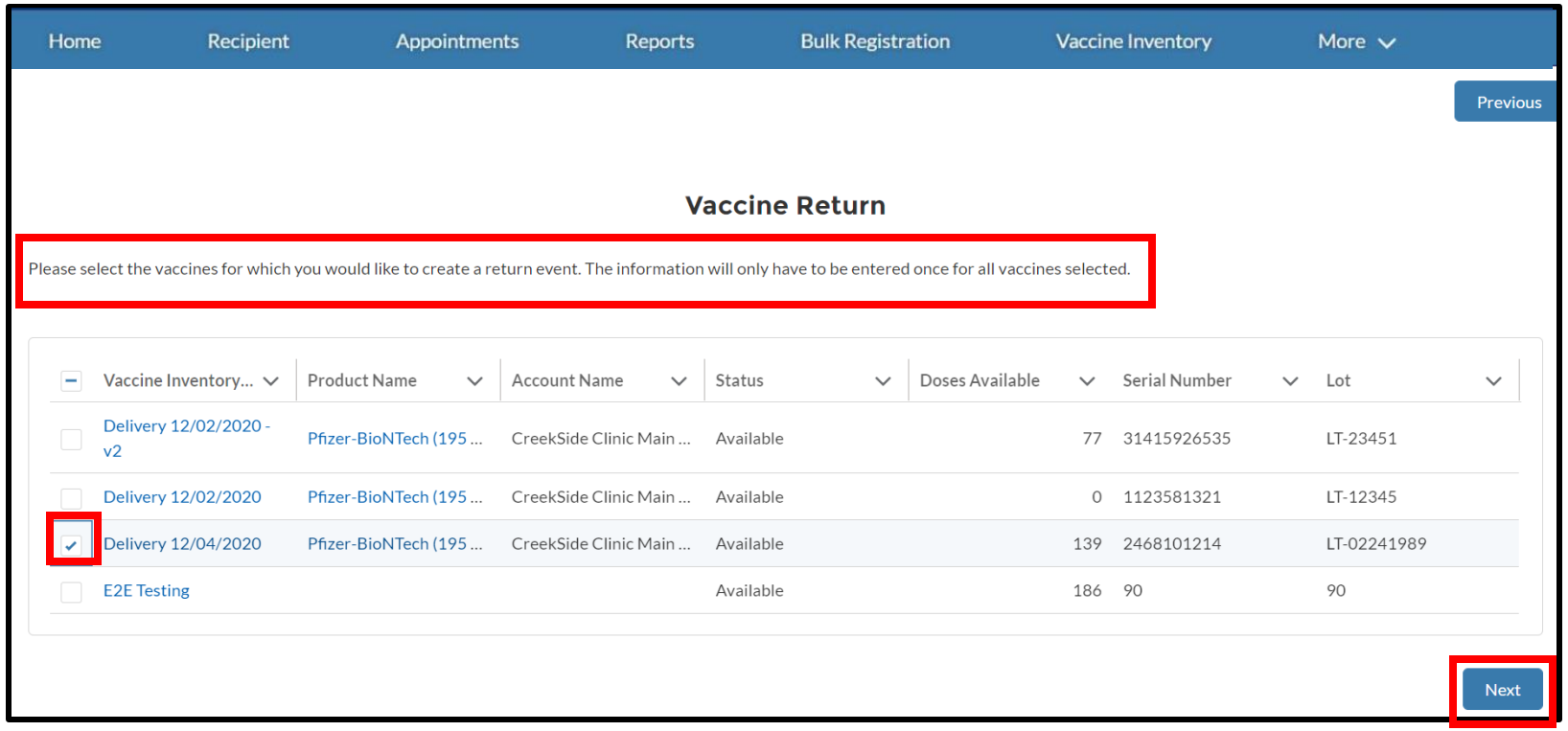
Tips

Sort the columns to help you find the Vaccine Inventory record.

Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory records to report a return. At the bottom, you will see **ALL RETURN EVENTS** displaying all previously recorded COVID-19 Vaccine Returns.

1. Check the **BOX** for the **APPROPRIATE ROW(S)**
2. Click **NEXT**
3. After clicking **NEXT**, you will see the **VACCINE RETURN SURVEY FORM**



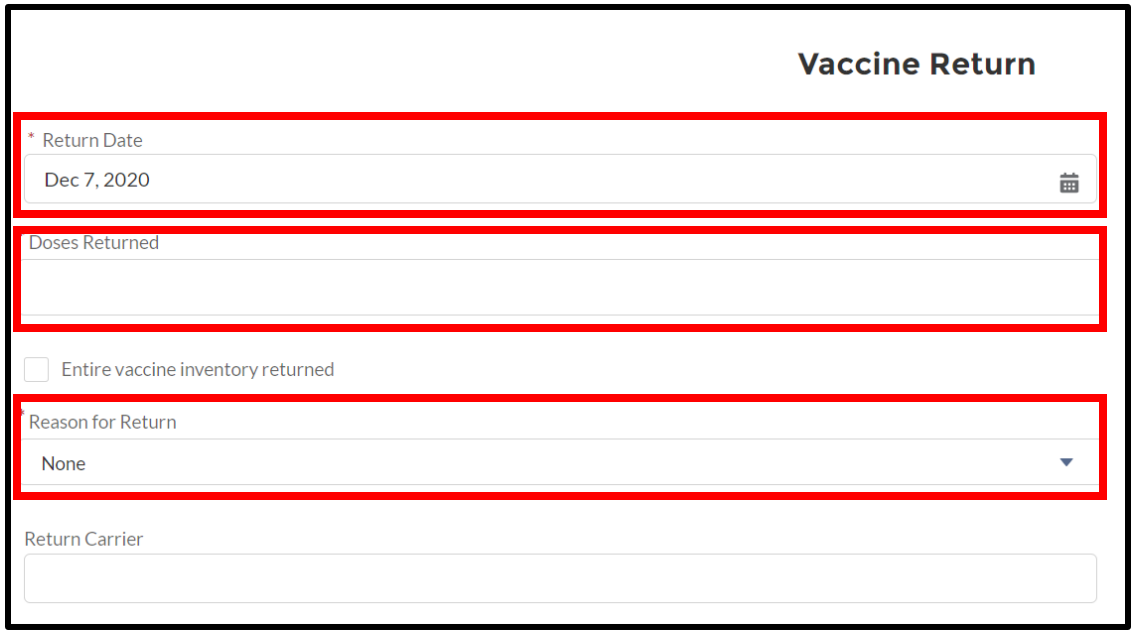
Audience

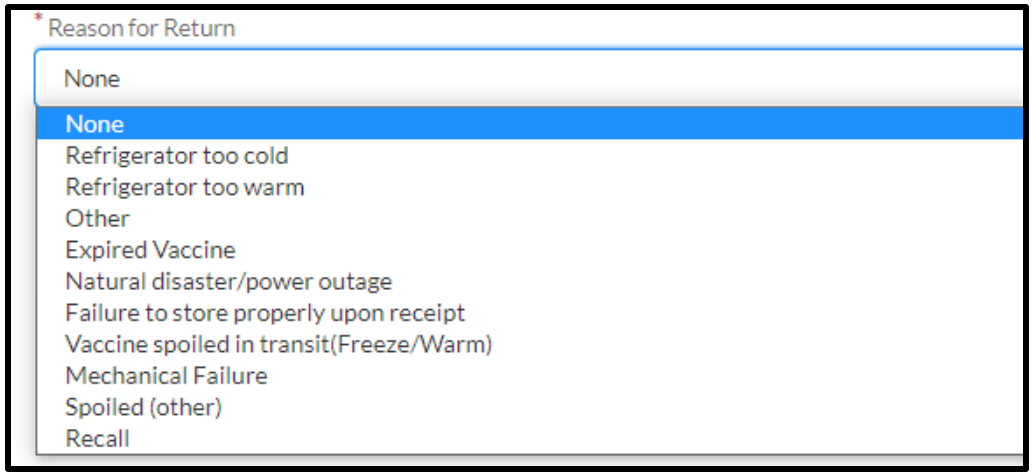
Healthcare Location Manager

Tips

If you want to review a past COVID-19 vaccine return record, scroll to the bottom of the page and click the Return ID Hyperlink.

Step 4 of 5: Complete the Vaccine Return Survey form





1. Populate all required **VACCINE RETURN FIELDS**
    1. Return Date
    2. Doses Returned
    3. If you want to report the entire Vaccine Inventory returned, check the Entire Vaccine Inventory Returned Checkbox.
    4. Reason for Return
2. You may populate **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once all details are confirmed, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**

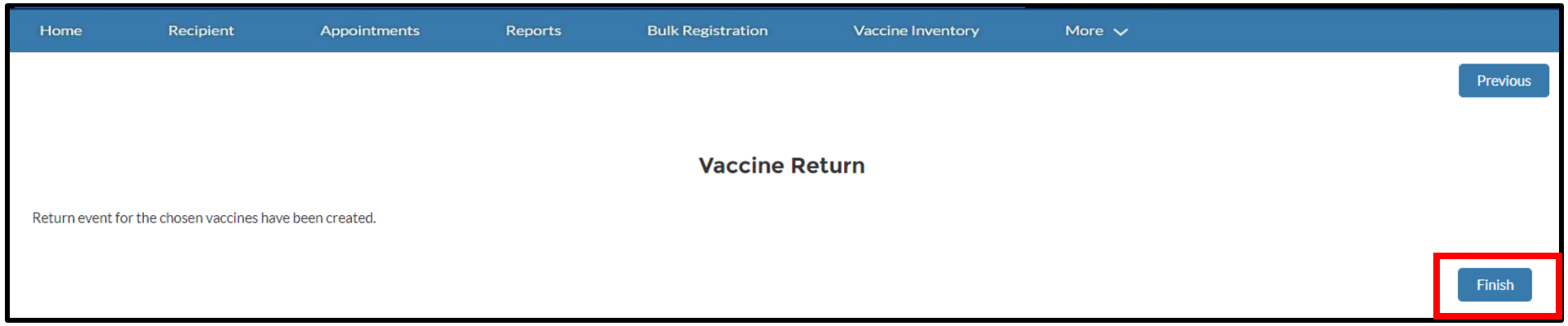
Audience

Healthcare Location Manager

Step 5 of 5: Submit the Vaccine Return Survey form

The **VACCINE RETURN RECORD** is now submitted, and your Vaccine Inventory will be automatically updated.

1. Click **FINISH**
2. After clicking **FINISH**, you will be directed back to the **INITIAL VACCINE RETURN SURVEY FORM PAGE**



Audience

Healthcare Location Manager

Tips

After clicking FINISH, you will see your vaccine return record displayed on the All Returns List View.

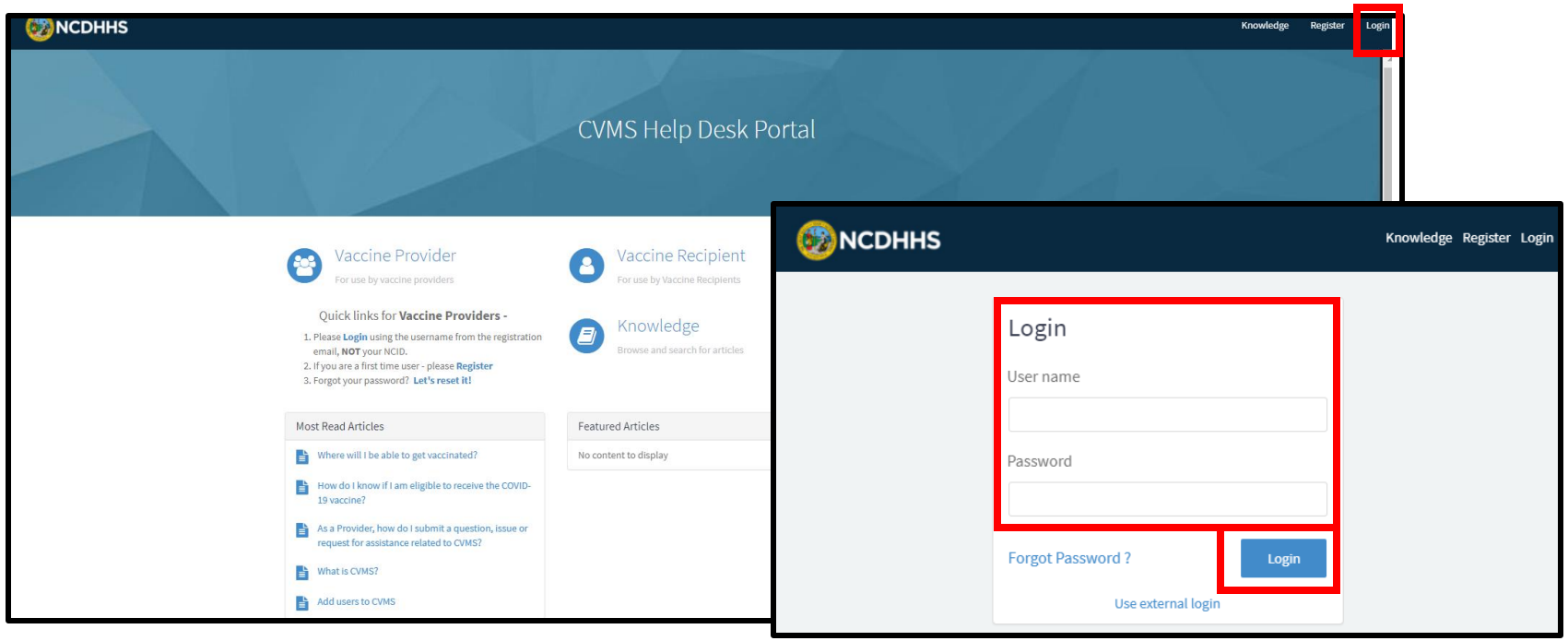
Transfer or Redistribute COVID-19 Vaccines (sender)

Step 1 of 9: Initiate an Outbound Redistribution/Transfer in the CVMS Help Desk Portal

Redistribution and transfer requests require **NC DHHS IMMUNIZATION BRANCH APPROVAL** to ensure proper storage capabilities and tracking of COVID-19 Vaccine Inventory movements

To initiate an **OUTBOUND REDISTRIBUTION/TRANSFER** to another location, you will have to submit a request

1. Navigate to the CVMS Help Desk Portal at 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 login questions)



Audience

Healthcare Location Manager

Tips

Please note that the sending provider is also responsible for transferring the second dose corresponding to the first dose transfers.

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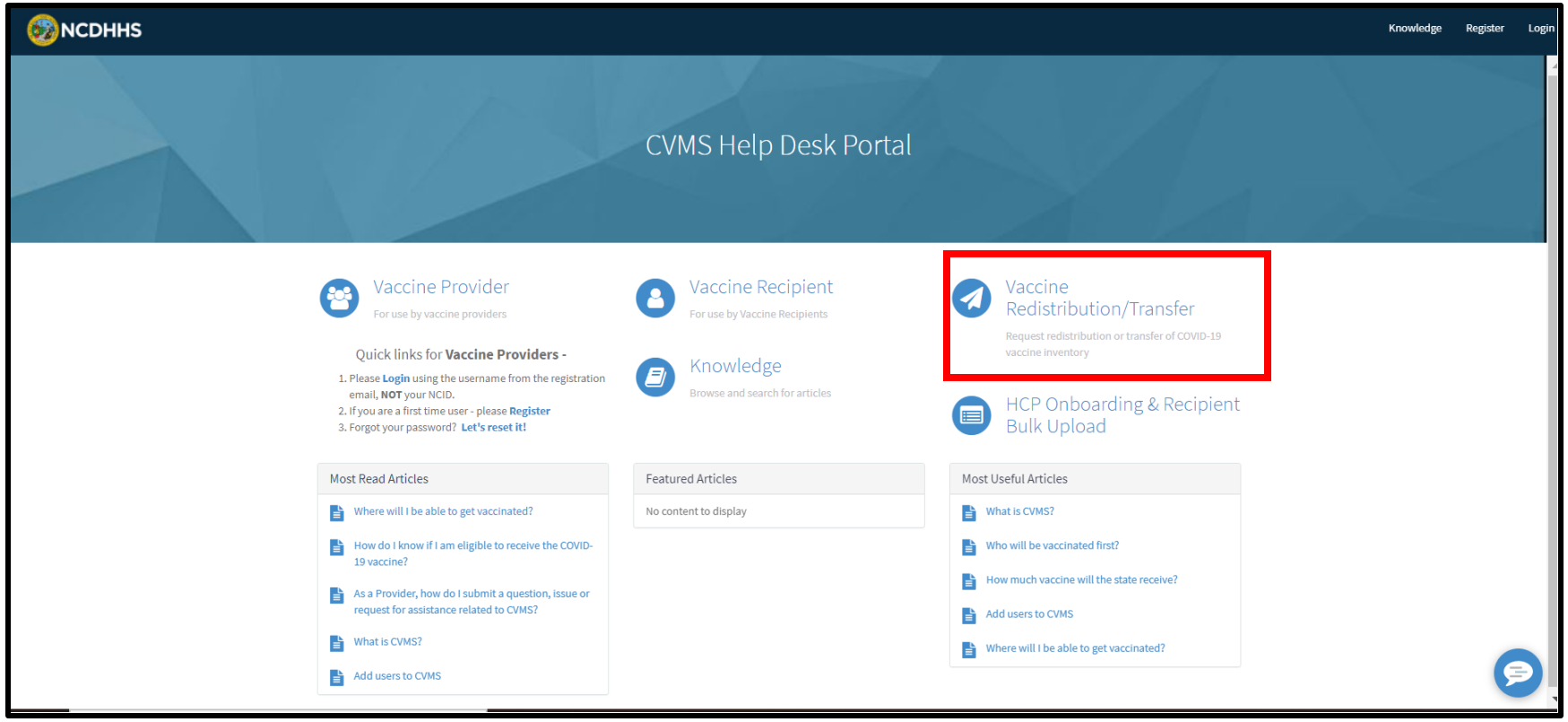
Step 2 of 9: Create the Request

1. From the Home page, click the **VACCINE REDISTRIBUTION/TRANSFER**



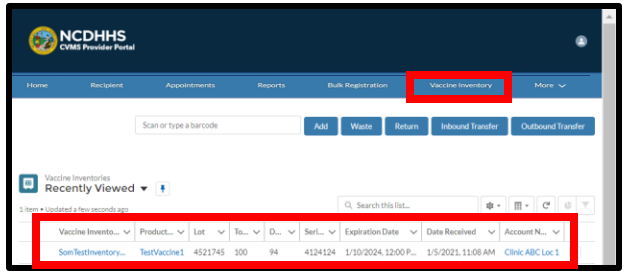
Audience

Healthcare Location Manager

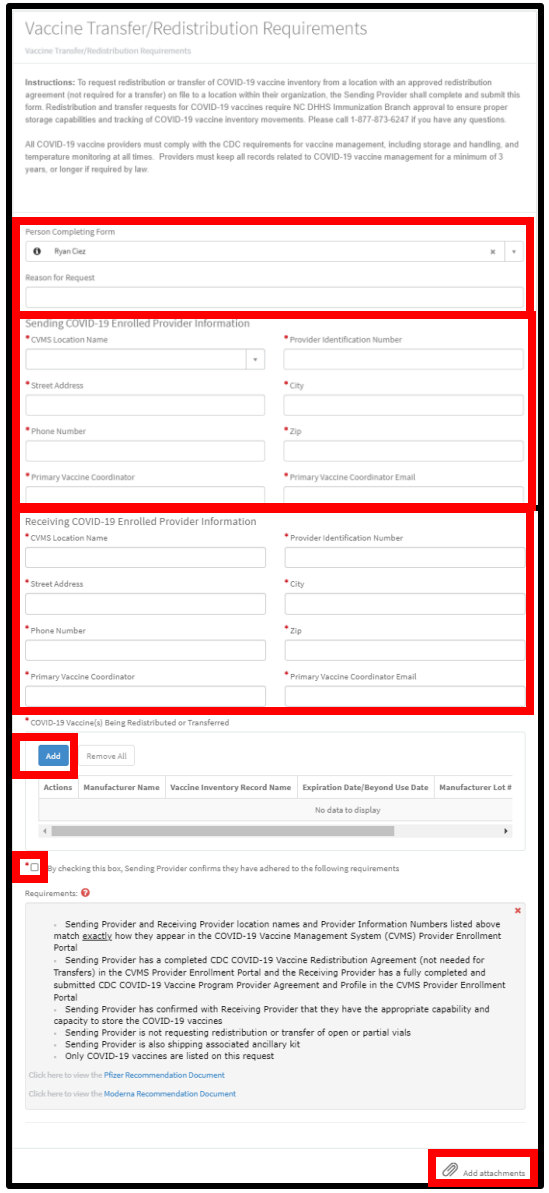
Step 3 of 9: Complete the Request Form

To fill the request for approval:

1. Enter your name and the reason for request
2. Enter the sending location details
3. Enter the location vaccine for children (VFC) **PROVIDER INFORMATION NUMBER**
4. Enter the receiving location details
5. Click on **ADD** and enter the details surrounding the vaccine inventory(s) being redistributed/transferred – Inventory details can also be found by navigating into the **VACCINE INVENTORY** tab of the CVMS Provider Portal



6. **CHECK** the box to indicate you agree to the listed requirements
7. Attach any relevant documentation
8. **SUBMIT** request to be routed for approval



Audience

Healthcare Location Manager

Tips

VFC PIN (i.e., NCA650001) can also be found in the CVMS Provider Enrollment Portal (Location) within the "For Official Use Only" section. It can also 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#).

Step 4 of 9: 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

IS

IT Service Desk <ncgovtest@servicenowservices.com>
To Ryan A Ciez

Your case has been created, click here to view the case: Link

Click here to view the Pfizer Recommendation Document

Click here to view the Moderna Recommendation Document

Someone will assist you soon.

Vaccine Transfer/Redistribution - Unregistered Provider-CVMS

Type your message here... Send

Ryan Ciez
just now
VACRD0001010 Created

Start

Actions

Close Case

Ticket Fields details

Number
VACRD0001010

Priority
3 - Moderate

State
New

Account
Unregistered Provider-CVMS

Updated
just now

Attachments

Drop files here

Audience

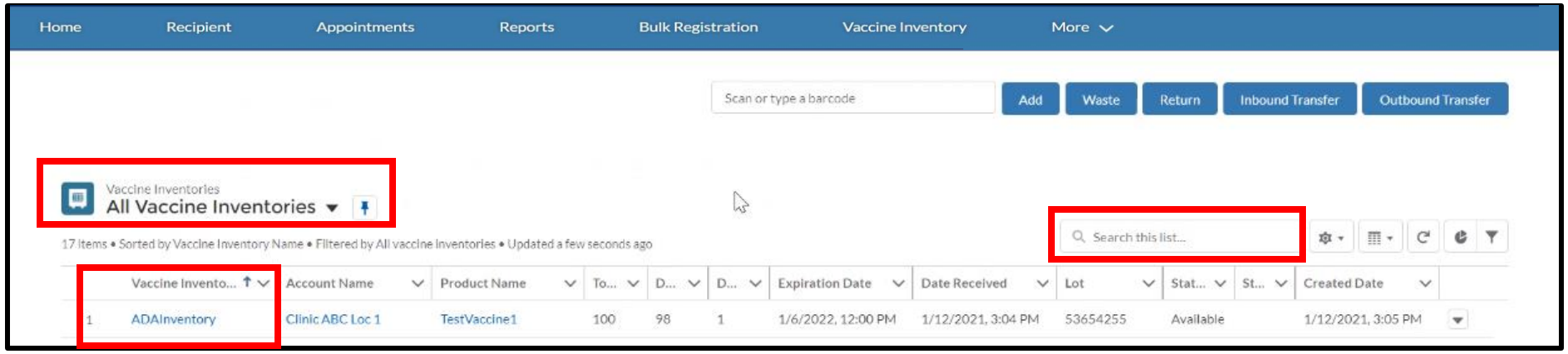
Healthcare Location Manager

Step 5 of 9: Providing Redistribution/Transfer Details

Once your **NC COVID-19 VACCINE REDISTRIBUTION/TRANSFER REQUEST** is approved, you will be able to **SHIP YOUR VACCINE INVENTORY** to the receiving location.

The Immunization Branch team will create the **TRANSFER ORDER** record in CVMS. You can **UPDATE** it with the **ACTUAL SHIPMENT DETAILS** to support tracking of the shipment. The order transfer record can be located via the Vaccine Inventory record that is providing the inventory.

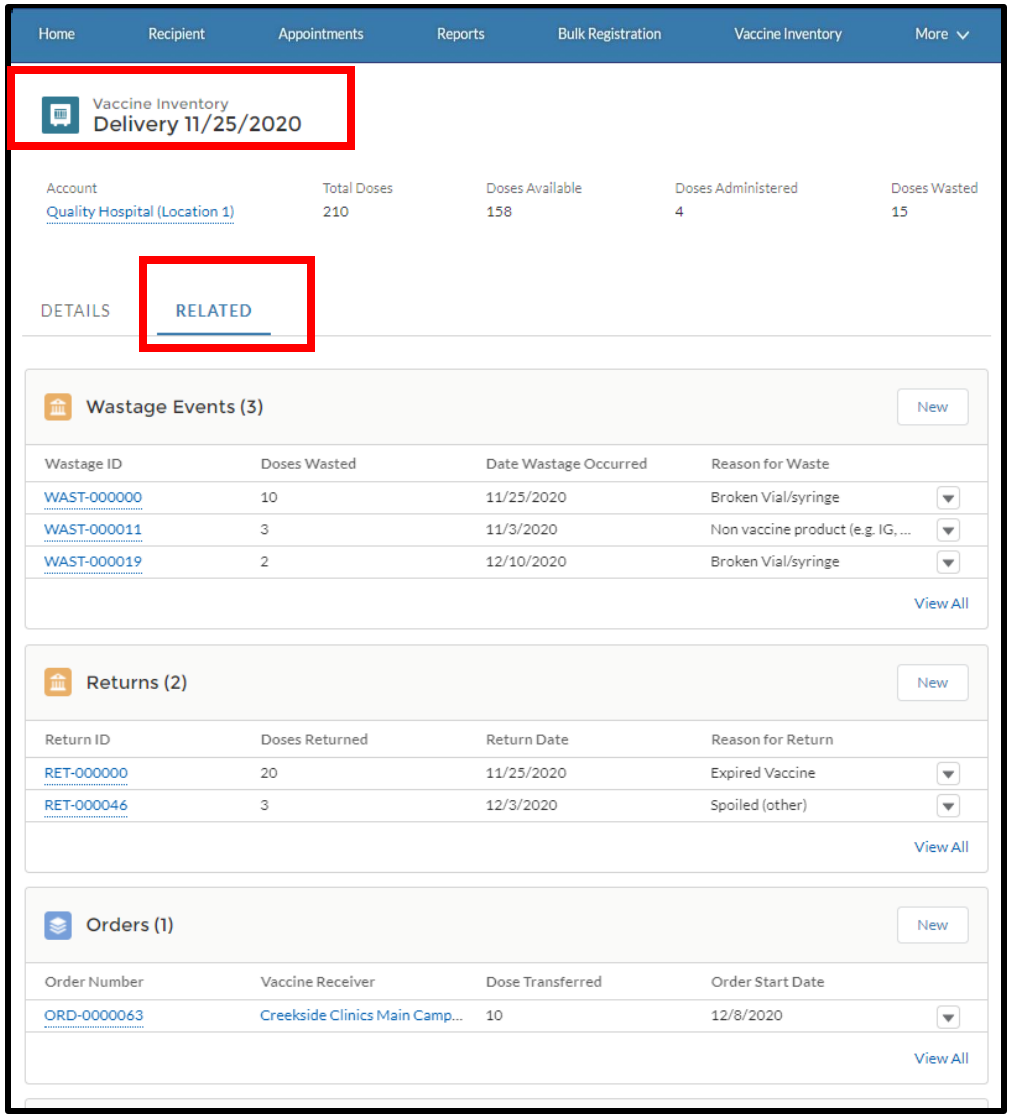
1. From the home page, click **VACCINE INVENTORY**
2. Search for the **VACCINE INVENTORY NAME**
3. Click the **VACCINE INVENTORY NAME**



Audience

Healthcare Location Manager

Step 6 of 9: Open the Vaccine Inventory Record



Once you are on the **VACCINE INVENTORY RECORD**, navigate to the **RELATED TAB.**

1. Navigate to the **RELATED TAB**

Audience

Healthcare Location Manager

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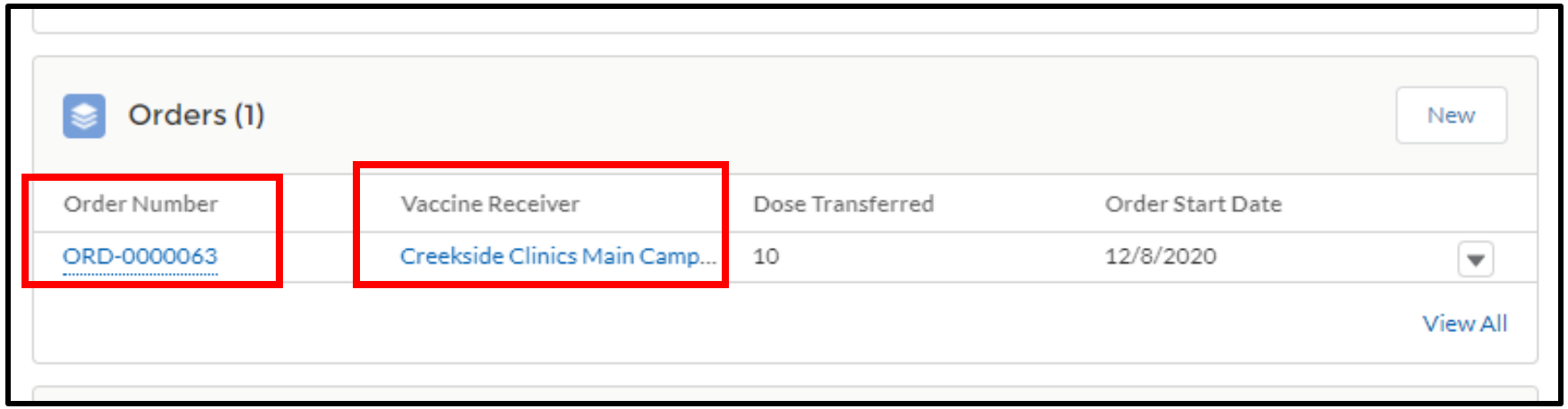
Step 7 of 9: Open the Order Transfer Record

You will be able to locate the **ORDER TRANSFER RECORD** that was created to track the redistribution/transfer. Before you edit the order transfer record, **CONFIRM THAT THE RECORD TYPE IS TRANSFER**.

1. Locate the **ORDERS SECTION**
2. Click the **ORDER NUMBER** for the **ORDER TRANSFER**



Audience

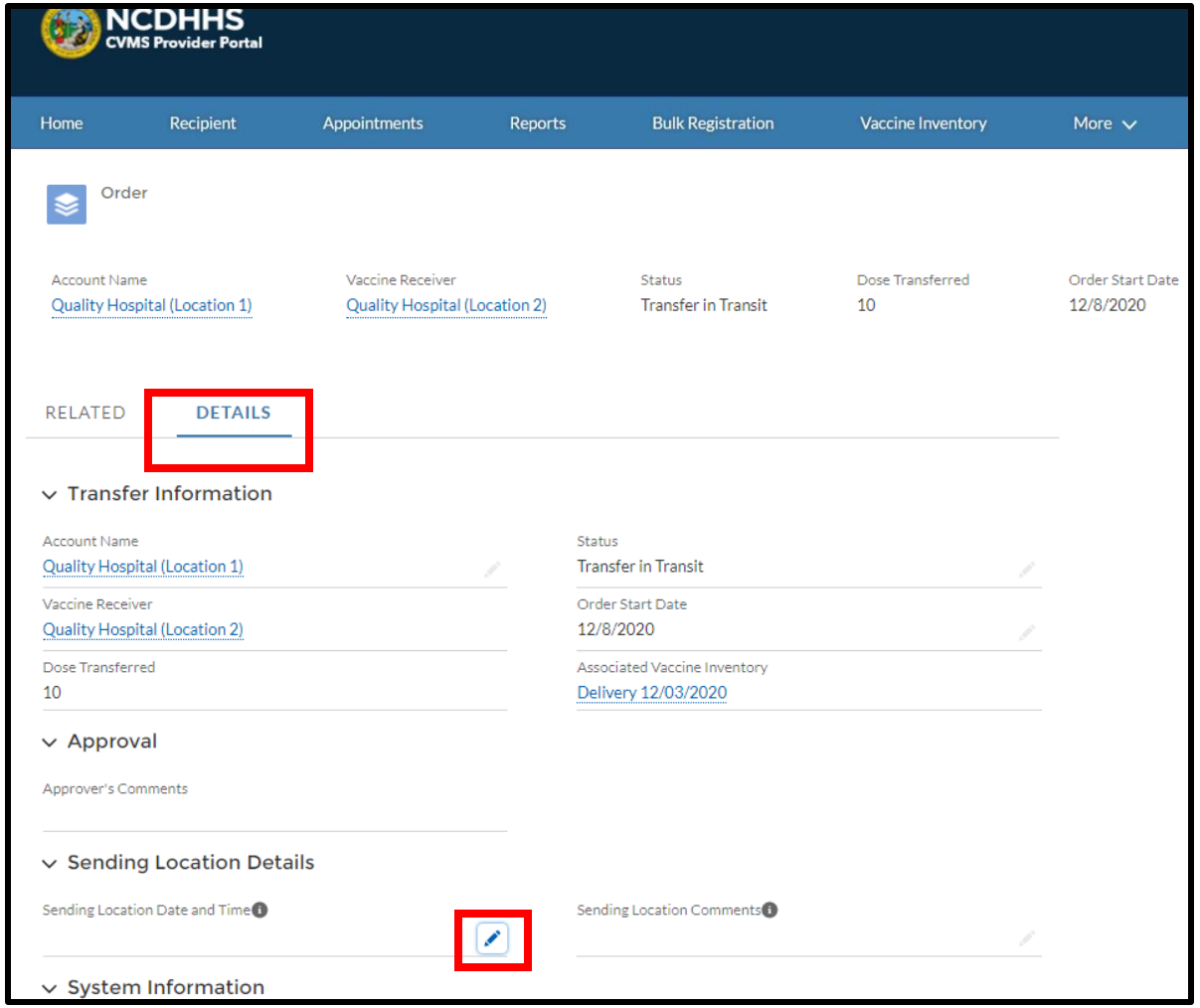
Healthcare Location Manager

Tips

Review the Vaccine Receiver to confirm it is the correct record.

Record Type of Transfer in CVMS is used for both Redistributions and Transfers.

Step 8 of 9: Edit the Order Transfer Record



Once you have the **ORDER TRANSFER RECORD** open, you can provide the **SHIPMENT DETAILS REQUIRED**.

1. Navigate to the **DETAILS SECTION**
2. Click the **PENCIL ICON** next to **SENDING LOCATION DATE AND TIME**

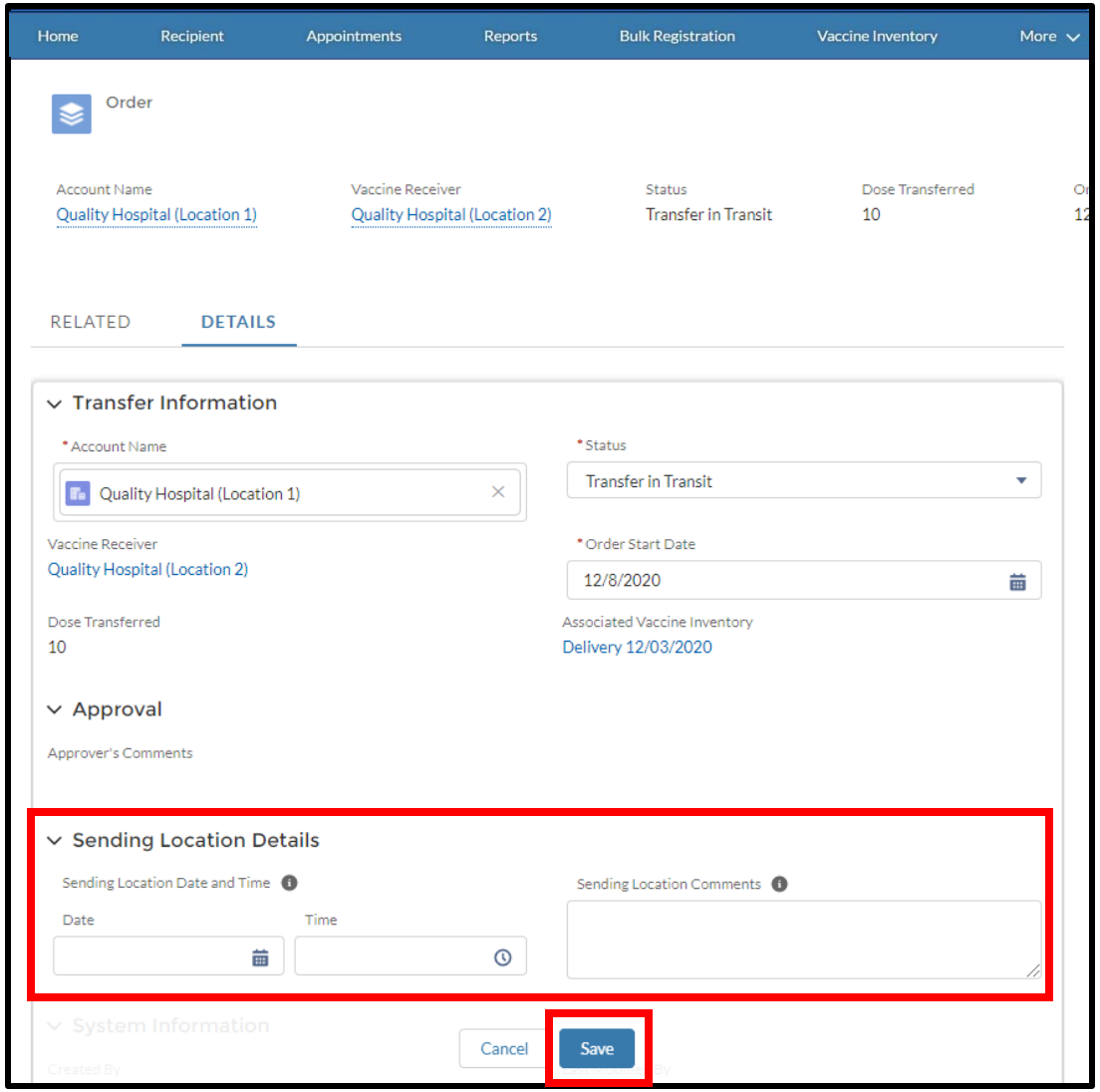
Audience

Healthcare Location Manager

Tips

Navigate to the details section to edit the order transfer record.

Step 9 of 9: Enter Shipment Details and Save



Once you click edit, you will be able to update the record and save your changes.

1. Enter the **SENDING LOCATION DATE AND TIME** when shipment was sent
2. Enter the **SHIPMENT TRACKING INFORMATION** in the **SENDING LOCATION COMMENTS** field
3. Click **SAVE**

Audience

Healthcare Location Manager

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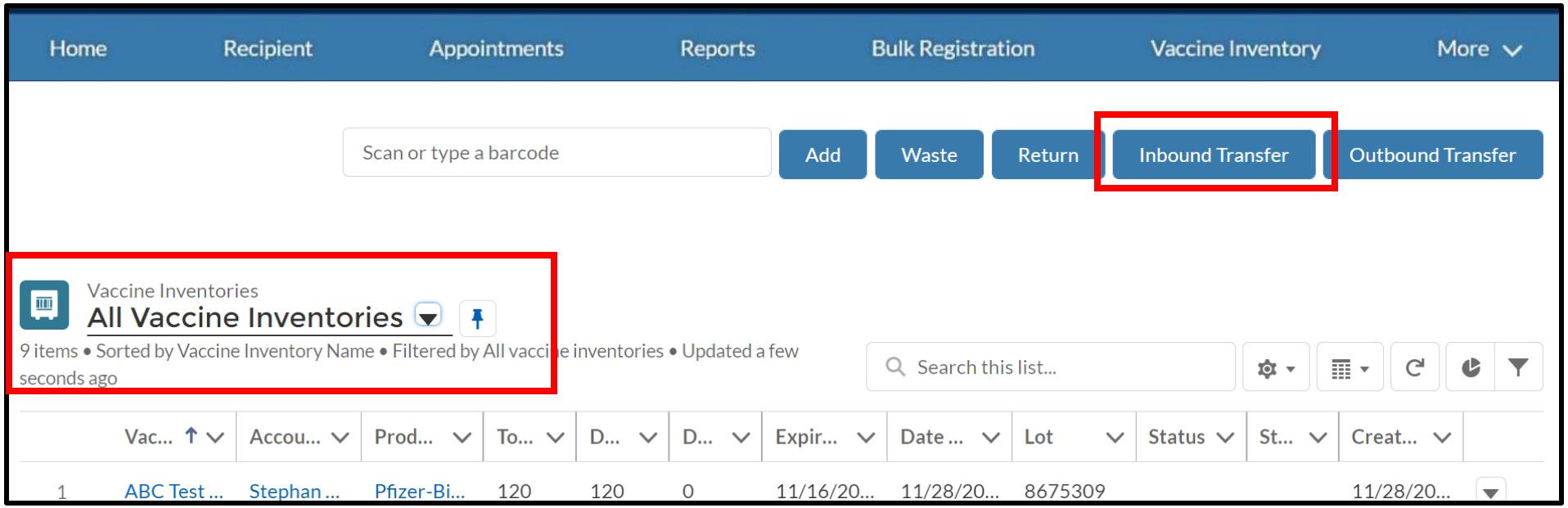
Transfer or Redistribute COVID-19 Vaccines (receiver)

Step 1 of 4: Processing an Inbound Redistribution/Transfer

If you are **RECEIVING** an **INBOUND REDISTRIBUTION/TRANSFER** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound redistribution/transfer, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound redistributions/transfers from the **ADD INVENTORY PROCESS**.

1. From the home page, click **VACCINE INVENTORY**
2. Click **INBOUND TRANSFER**



Audience

Healthcare Location Manager

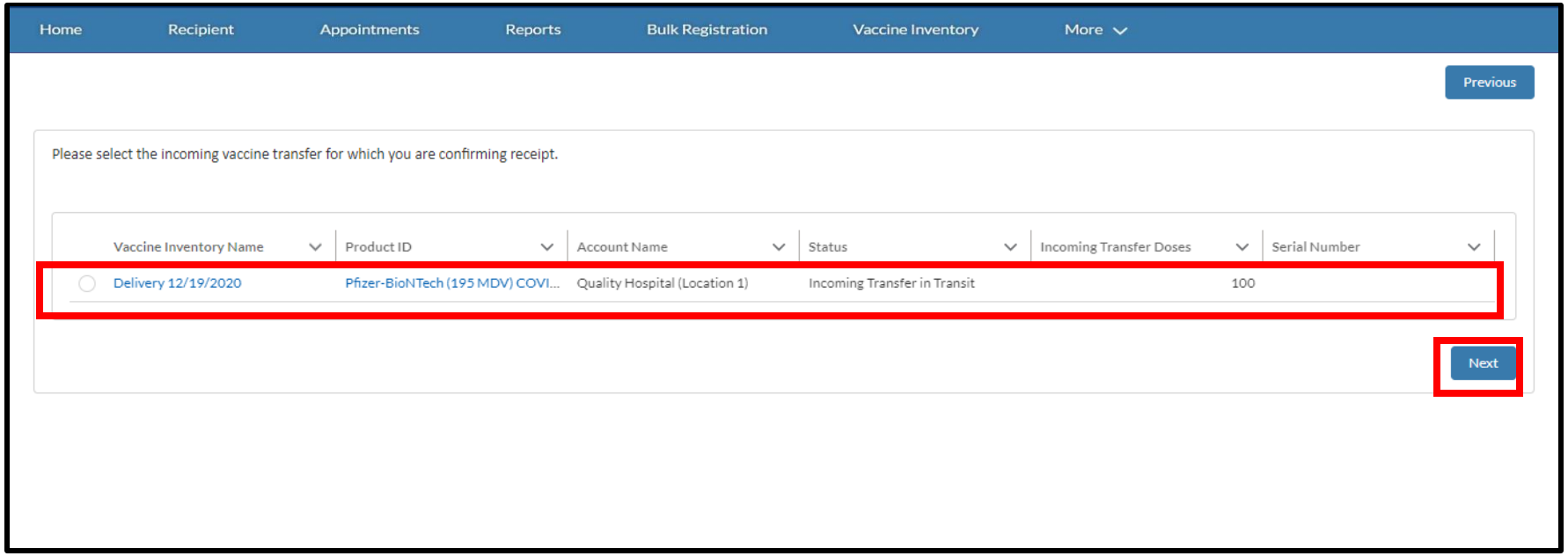
Tips

Inbound redistributions/transfers are **not** processed from the Add Inventory Process.

Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** records that are incoming redistributions/transfers to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

1. Select the correct **VACCINE INVENTORY** record
2. Click **NEXT**



Audience

Healthcare Location Manager

Tips

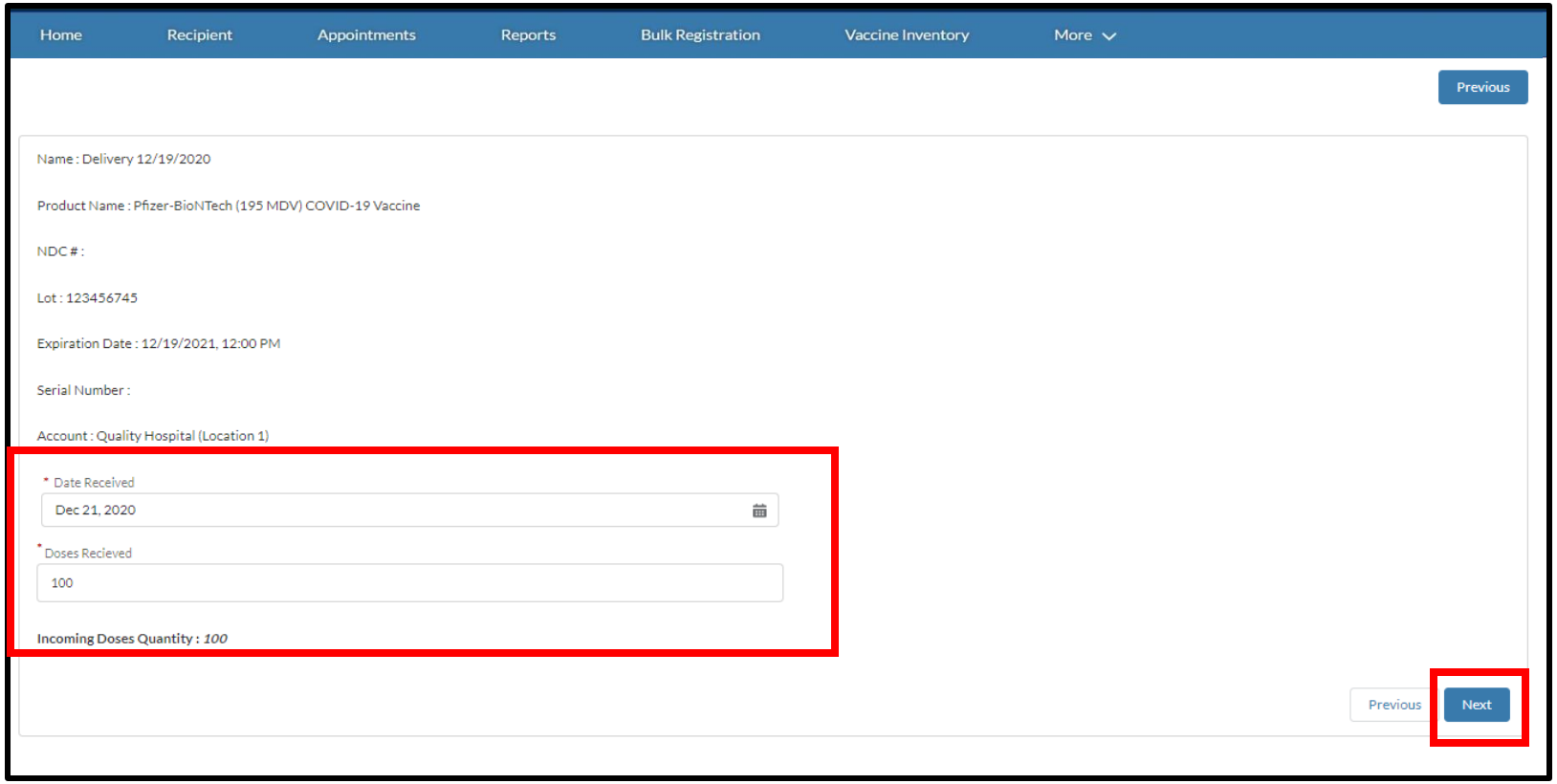
Identify Vaccine Inventory records for inbound redistribution/transfer.

Step 3 of 4: Complete the Inbound Transfer form

Once you select the Vaccine Inventory record, you will see the Vaccine Inventory details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound redistribution/transfer is now processed.

1. Enter the **DATE RECEIVED**
2. Enter the **DOSES RECEIVED**
3. Click **NEXT**



Audience

Healthcare Location Manager

Tips

Enter date received and doses received for the Vaccine Inventory.

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Step 4 of 4: Complete the Inbound Transfer form

After clicking next, your inbound redistribution/transfer is processed and added to your inventory.

1. Click **FINISH**

Audience

Healthcare Location Manager

Tips

Complete the inbound transfer form by clicking Finish.

Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
- A Toggle can be clicked to see selectable options.
- A Pen can be clicked to make edits to the field.
- Previous Next Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.
- Pause 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 the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:

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

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

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/21/2020	• Initial document		Azalea Troche
2	1/10/2021	• Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Hep Desk Portal information	1, 2, 7, 11, 15, 21, 34	Courtney Seward
3	1/13/2021	• Added a new screenshot of the new redistribution/transfer form and took out the TIP in slide 21. The CVMS Help Desk Portal screenshot was also added.	1, 21, 22	Courtney Seward
4	1/17/2021	• Updated navigation bar. • Updated the terms for Redistribution and Transfer	6	Azalea Troche & Courtney Seward
5	1/21/2021	• Added a TIP	21	Courtney Seward & Linda Wade
6	1/27/2021	• Updated Navigation Bar screen shots to show reports tab	5,9,10,11,13,15,16,17,19,23,25,26,28,29,31,32, 33,34	Kristin Clark
7	2/4/2021	• Updated CVMS Help Desk Portal Screenshot	21,22	Courtney Seward