North Carolina COVID-19 Vaccine Management System

Provider Enrollment Portal Account Maintenance User Guide

Version 5
February 11, 2021

NCDHHS COVID-19 Response
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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After successfully enrolling your organization in the North Carolina COVID-19 Vaccine Management System (CVMS), you can still connect to the CVMS Provider Enrollment Portal to update information about your locations.

The content included in this user guide is for the following role: **Organization Administrator**

This user guide describes how to complete the following activities:
1. Reviewing locations
2. Adding new locations
3. Deactivating existing locations
4. Updating existing locations

Additionally, you will need to:
- Use the latest version of Chrome, Firefox, or Safari
- Log into the CVMS Provider Enrollment Portal (https://covid-enroll.ncdhhs.gov/)

Now, let’s get started!
Account Maintenance Process Overview
Account Maintenance Process

What should I do when adding new, deactivating existing, or updating existing locations?

1. Log into CVMS Provider Enrollment Portal.
2. Select ADD, DEACTIVATE, or UPDATE to perform your desired task.
3. Begin resubmission of your organization's information.
   - You will click through to the LOCATIONS page where you can add a location, update information for an existing location, or deactivate a location.
4. Once your desired updates are made, click through to the review page.
   - Submit the resubmission and the process is complete.

Audience
- Organization Administrator
Reviewing Organization Record
Step 1 of 1: Review Section A

Organization Administrators can **REVIEW** information about their organization submitted in **SECTION A**. You should review your organization record first before updating your submission. This step is only applicable to organizations with a Provider Enrollment Agreement that has already been approved.

1. Navigate to the **HOME** page of the **CVMS Provider Enrollment Portal**. If your organization is not yet approved, proceed to the next step.
2. Select **REVIEW**
3. Click **NEXT**
4. Review the status of your Provider Enrollment Agreement
Adding Locations
Step 1 of 3: Begin Resubmission

Organization Administrators can **UPDATE** information about their organization submitted in **SECTION A**. The below step is only applicable to organizations with a Provider Enrollment Agreement that has already been approved.

1. Navigate to the **HOME** page of the **CVMS Provider Enrollment Portal**
2. Select **RESUBMIT FOR CHANGES**
3. Click **NEXT**

Tips
You may update any information that is a part of your submission. Clicking **PAUSE** allows you to save and return at a later point.

Audience

**Organization Administrator**

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[Image of the CVMS Provider Enrollment Portal interface showing the options `Resubmit for Changes` and `Pause`]

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[Logo of the California Department of Health and Human Services]
Step 2 of 3: Add Location

This step takes you to the LOCATIONS PAGE where you can ADD a location. You may also update and deactivate locations. Reference the other sections in this guide to learn how to perform these activities.

1. Click NEXT on the Organization Information page
2. Add the location’s details under the ADD NEW LOCATION header
3. Click CREATE LOCATION
4. Review location details under the PENDING LOCATIONS header
5. Repeat this process for each location you wish to add
6. Click NEXT

Tips
You must hit the CREATE LOCATION button before you can proceed the next page.

Audience
Organization Administrator
Step 3 of 3: Complete Resubmission

Your location(s) is now added. You can complete your resubmission.

1. Click **NEXT** on the Responsible Officers page
2. Read the **REVIEW** page

You have now added locations to your organization.
Deactivating Locations
Step 1 of 3: Begin Resubmission

Organization Administrators can UPDATE information about their organization submitted in SECTION A. Review your organization details first before resubmitting to DEACTIVATE existing locations. The below step is only applicable to organizations with a Provider Enrollment Agreement that has already been approved.

1. Navigate to the HOME page of the CVMS Provider Enrollment Portal
2. Select RESUBMIT FOR CHANGES
3. Click NEXT

Tips
You may update any information that is a part of your submission. Clicking PAUSE allows you to save and return at a later point.
Step 2 of 3: Deactivate Location(s)

This step takes you to the LOCATIONS PAGE where you will DEACTIVATE a location. You may also update and add locations. Reference the other sections in this guide to learn how to perform these activities.

1. Click NEXT on the Organization Information page
2. Select each location you wish to deactivate by selecting the checkbox from the list
3. Review the locations you have selected to deactivate
4. Click the DEACTIVATE LOCATION(S) button
5. Click NEXT
Step 3 of 3: Complete Resubmission

You have deactivated your location(s). You may now complete your resubmission.

1. Click NEXT on the Responsible Officers page
2. Read the REVIEW page

You have now deactivated locations from your organization.
Updating Locations
Step 1 of 3: Begin Resubmission

Organization Administrators can **UPDATE** information about their organization submitted in **SECTION A**. Review your organization details first before resubmitting to **UPDATE** existing locations. The below step is only applicable to organizations with a Provider Enrollment Agreement that has already been approved.

1. Navigate to the **HOME** page of the **CVMS Provider Enrollment Portal**
2. Select **RESUBMIT FOR CHANGES**
3. Click **NEXT**

**Tips**
- You may update any information that is a part of your submission.
- Clicking **PAUSE** allows you to save and return at a later point.
Step 2 of 3: Update Location(s)

This step takes you to the LOCATIONS PAGE where you will UPDATE a location. You may also add and deactivate locations. Reference the other sections in this guide to learn how to perform these activities.

1. Click NEXT on the Organization Information page
2. Click the PEN ICON associated with the field you wish to update
3. Update the information
4. Review the information. Repeat for all details you wish to update.
5. Click NEXT

Tips
You must hover over the field you wish to update to view the pen icon 🖋.

Audience
Organization Administrator
Step 3 of 3: Complete Resubmission

You now updated your location(s). You may now complete your resubmission.

1. Click **NEXT** on the Responsible Officers page
2. Read the **REVIEW** page

You have now updated your agreement.
Appendix
Locations Page

- A list of all locations is displayed on the **LOCATIONS** page of the Section A flow.
- You may **ADD**, **UPDATE**, or **DEACTIVATE** any records on this page.
- Clicking **CREATE LOCATION** creates the location in your organization.
- The **NEXT** button will be disabled if text remains in the fields under the **ADD NEW LOCATION** header without you clicking Create Location.
- Delete the text if you do not wish to create the location.
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.
- **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 the 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 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

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<td>1</td>
<td>12/10/2020</td>
<td>• Original version</td>
<td></td>
<td>Kevin Kauffman</td>
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<td>2</td>
<td>12/31/2020</td>
<td>• Removed link to the Provider Enrollment portal</td>
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<td>Simon Couderc</td>
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<td>• Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information.</td>
<td>1, 2, 23</td>
<td>Courtney Seward</td>
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<tr>
<td>4</td>
<td>1/14/2021</td>
<td>• Branding Update</td>
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