

CVMS Provider Portal Log In and Getting Started User Guide

Version 5

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.servicenowservices.com/csm_vaccine
If you are in North Carolina, you can also call the Provider Contact Center at (877) 873-6247 and
select option 8. The Provider Contact Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* 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*

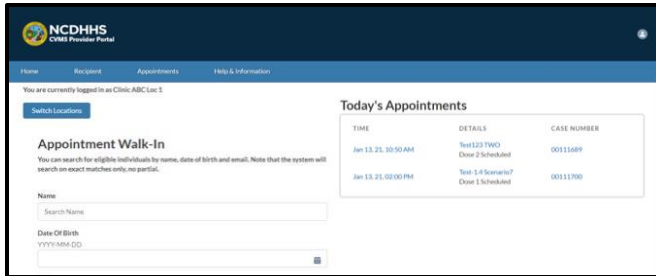
3. You will receive an e-mail with your username and temporary password to log into the portal

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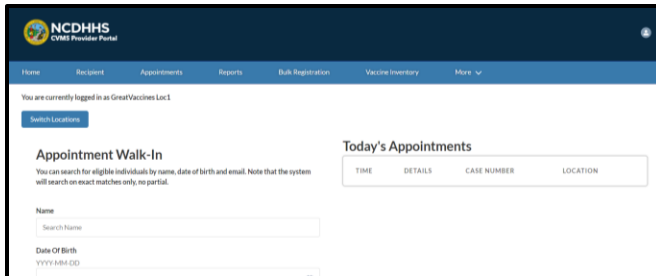
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Log in and Getting Started with the CVMS Provider Portal

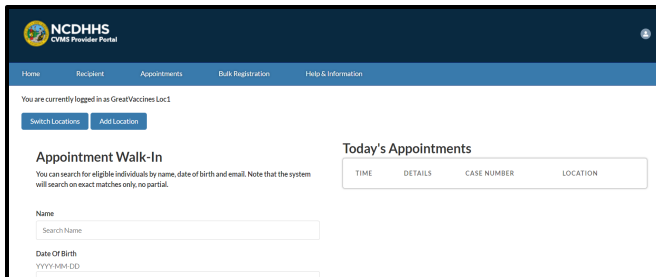
Overview



Healthcare Provider



Location Manager



Statewide Location Manager

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

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

The processes included in this training are for the **Healthcare Location Manager** and **Healthcare Provider** profiles.

Statewide Location Managers: All information for the Healthcare Provider profile will apply to the Statewide Location Manager profile. The **'Add A Healthcare Provider Location'** section is only for Statewide Location Managers.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, Edge Chromium browsers.

Now, let's get started!

Log in to the CVMS Provider Portal

Enter NCID Username and NCID Password

1. Navigate to <https://covid-vaccine-provider-portal.ncdhhs.gov>
2. The link to the CVMS Provider Portal will open a NCID Log-In Screen
3. Enter your **NCID username** and **NCID password**
4. Click **NCID LOGIN**
5. You are logged in to the CVMS Provider Portal

For guidance on obtaining an NCID, refer to the Appendix.

NCID Tips

NCID

Username

Password

NCID Login

[Forgot Username](#)
[Forgot Password](#)
[Unlock Account](#)

[Need Help?](#) [Register!](#)

[Privacy and Other Policies](#) [Contact Us](#)

WARNING: This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action.
NCC742

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

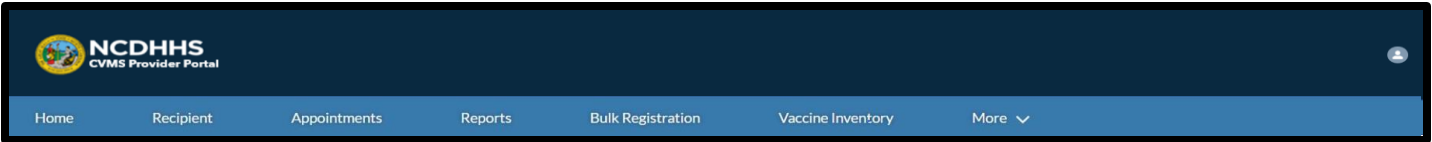
Tips

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

View the CVMS Provider Portal Tabs

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

- 1. Users with Healthcare Location Manager profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, REPORTS, BULK REGISTRATION, VACCINE INVENTORY, SHIPMENTS, ORGANIZATION MANAGEMENT, HELP & INFORMATION** and, **ACCOUNT MANAGEMENT**



- 2. Users with Healthcare Provider profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS,** and **HELP & INFORMATION**



- 3. Users with Statewide Location Manager profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, BULK REGISTRATION,** and **HELP & INFORMATION**



Audience

Healthcare
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Location Manager

Tips

Learn more about managing your recipient’s appointments in the CVMS Provider Portal Recipient Check-In User Guide.

Multi-Location Users Only: Select Location Using 'Switch Location' Before Proceeding

Users associated with multiple locations will have to select a location where you are operating upon logging in to the CVMS Provider Portal.

When you log in to the CVMS Provider Portal, **please pay attention to the banner at the top of the Home page**. All of your operations in the Portal (e.g., booking appointments, logging vaccine administration) will be attributed to the location that you select. You **will not** be able to complete these task until you pick a location.

1. Click **SWITCH LOCATION**
2. Select the **LOCATION** where you will operate during the day

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Location Manager

Tips

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

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

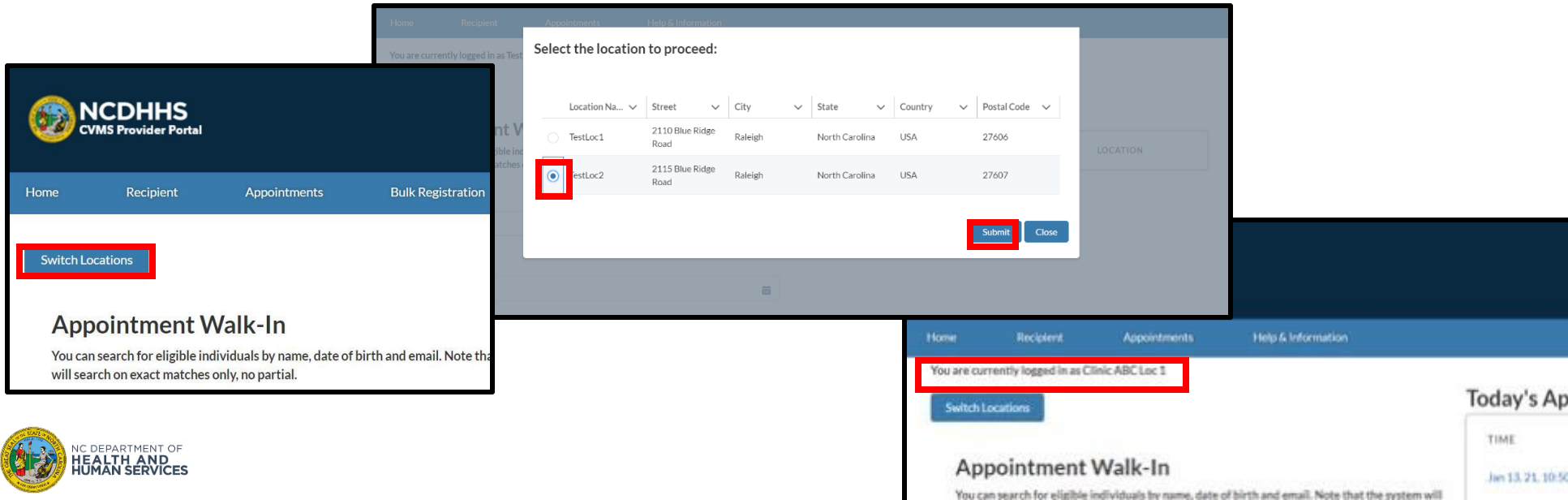
The screenshot displays the NCDHHS CVMS Provider Portal interface. At the top, a dark blue header contains the NCDHHS logo and a navigation menu with links: Home, Recipient, Appointments, Reports, Bulk Registration, Vaccine Inventory, and More. A yellow warning banner is visible at the top, stating: "Warning: Please click the 'Switch Locations' button and select a location in order to book, view, and complete appointments." Below the header, the main content area shows a "Switch Locations" button highlighted with a red box. The "Appointment Walk-In" section is visible, with search fields for Name, Date Of Birth, and Email. A "Search" button is located below these fields. A modal window titled "Select the location to proceed:" is open, showing a table of available locations. The "TestLoc2" location is selected, indicated by a red box around its radio button. The "Submit" button in the modal is also highlighted with a red box.

Location Na...	Street	City	State	Country	Postal Code
<input type="radio"/> TestLoc1	2110 Blue Ridge Road	Raleigh	North Carolina	USA	27606
<input checked="" type="radio"/> TestLoc2	2115 Blue Ridge Road	Raleigh	North Carolina	USA	27607

Logging In to Another Location (if necessary)

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

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



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Tips

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


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

Navigate the CVMS Provider Portal

Step 1 of 10: View the CVMS Provider Portal Homepage

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

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



Home

Recipient

Bulk Registration

Vaccine Inventory

Shipments

Help & Information

Appointment Walk-In

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

Name

Date Of Birth

YYYY-MM-DD

Email

Search

Today's Appointments

TIME

DETAILS

CASE NUMBER

Audience

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Provider

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Location Manager

Statewide
Location Manager

Tips

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

Step 2 of 10: Recipient Tab Overview

Home

Recipient

Appointments

Reports

Bulk Registration

Vaccine Inventory

More

Create New Recipient

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

Q Testdema

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Eligibility Status	Priority	Recipient Dose Status	Email
Nicholas	TestDemo	Feb 24, 1989	Male	Not Approved	Phase 2 Group 3	Registered	

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
Nicholas	TestDemo	Feb 24, 1989	Male	1

The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal.

Your search results will also include any records of a recipient who received a COVID-19 vaccine dose with their long-term care facility provided by a State of North Carolina pharmacy partner.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Point of Care User Guide**.

Step 3 of 10: Appointments Tab Overview

HomeRecipientAppointmentsReportsBulk RegistrationVaccine InventoryMore

You are currently logged in as Clinic ABC Loc 1

Appointments

All Appointments

0 items

Cancel Appointment

Search Appointments

Search by Name, Location, Vaccine Status

From

To

Status

--- None ---

Search

Reset

☐

Case

▼

▼

▼

▼

▼

▼

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▼

- Audience
- Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

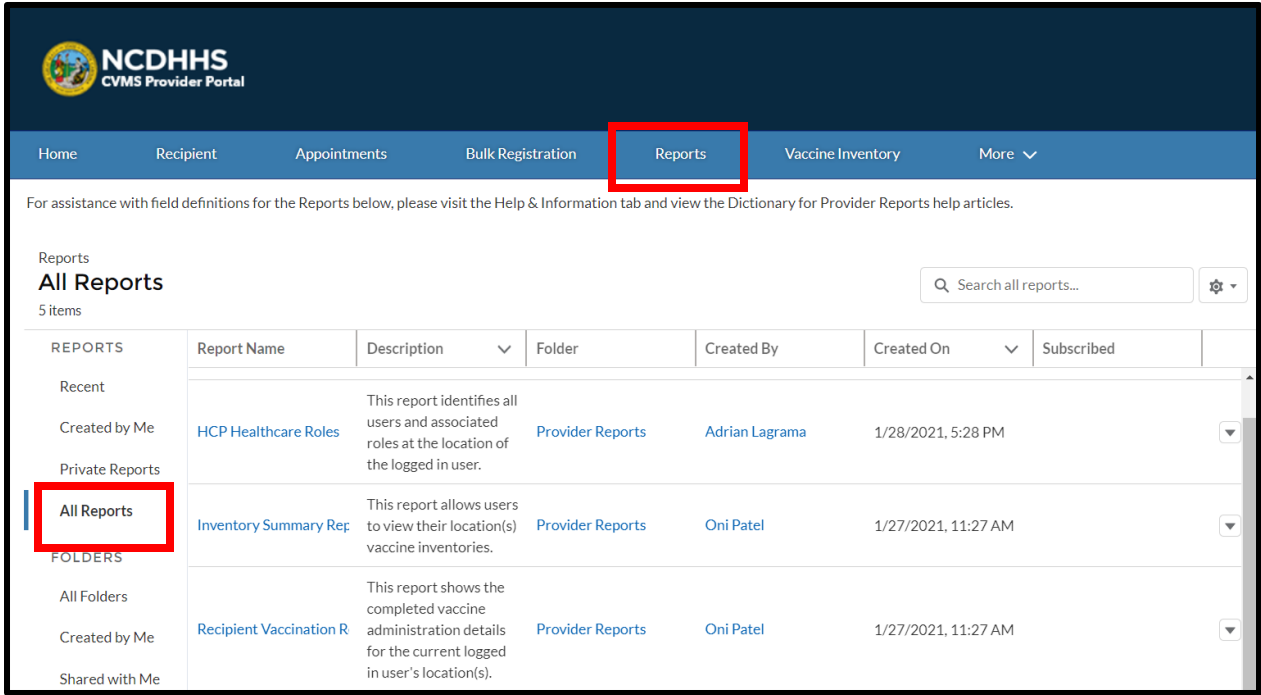
Tips

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

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

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

Step 4 of 10: Report Tab Overview



Audience

Healthcare
Location Manager

Tips

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

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

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

Step 5 of 10: Bulk Registration Tab Overview

HomeRecipientAppointmentsReportsBulk RegistrationVaccine InventoryMore

Low Volume (100)High Volume (5,000)

Employee Upload

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

Drag and Drop CSV file here

Total number of records: 10296

Search this list...

First NameLast NameEmail

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

Audience

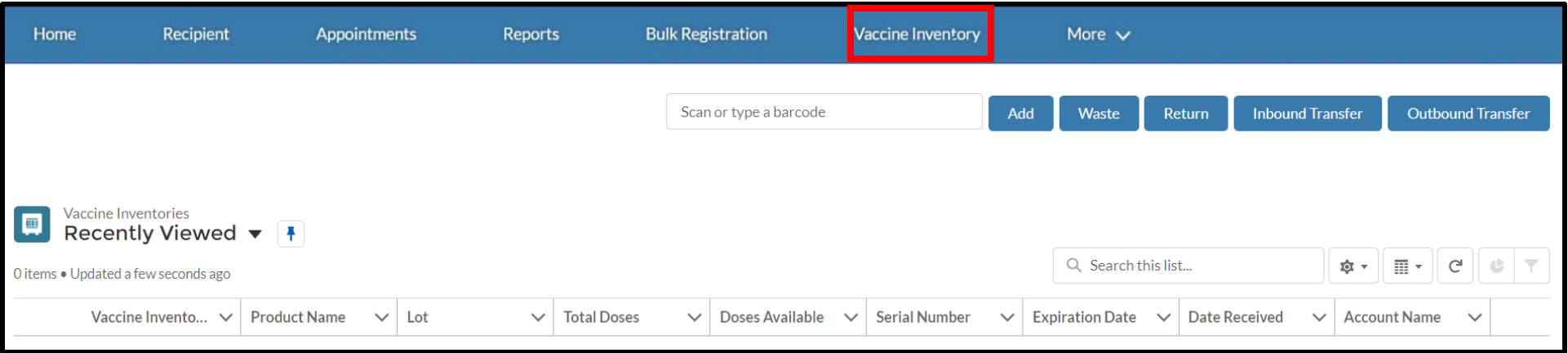
Healthcare
Location Manager

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Location Manager




Tips

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

Step 6 of 10: Vaccine Inventory Tab Overview



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

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

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

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Tips

Learn more about managing your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving and Processing Vaccine Shipments User Guide** and in the **CVMS Provider Portal Vaccine Inventory Deprecation, Transfer & Redistribution User Guide**.

Step 7 of 10: Shipments Tab Overview

HomeRecipientAppointmentsBulk RegistrationReportsVaccine InventoryMore ^

Shipment

Recently Viewed ▾

0 items • Updated 2 minutes ago

Shipment ID ▾	Shipment Qu... ▾	Manufacturer ▾	NDC ▾	Quantity Shi... ▾	Lot Number ▾	Date ▾
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Pin

Shipments

Organization Management

Help & Information

Account Management

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

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

Audience

Healthcare Location Manager

Tips

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

Step 8 of 10: Organization Management Tab Overview

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More ^

Shipments

Organization Management

Help & Information

Account Management

Accounts

All Business Accounts

Name

Industry

All

ACCOUNT NAME

INDUSTRY

PHONE

ADDRESS

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

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Tips

Learn more about Organization management in the **CVMS Provider Portal Organization Management User Guide**.

Step 9 of 10: Help and Information Tab Overview

HomeRecipientAppointmentsBulk RegistrationReportsVaccine InventoryMore ^

Top Articles

General Information

COVID-19 Recipient Vaccination Health Questionnaire

Self Learning Materials

CDC Guidance Regarding the COVID-19 Vaccine

Contact CVMS Help Desk Portal

NC DHHS Related Information

Frequently Asked Questions

Access List of FAQs?

CVMS Related Updates?

Shipments

Organization Management

Help & Information

Account Management

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

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Tips

Learn more about finding support in the **CVMS Provider Portal Accessing Help Resources User Guide**.

Step 10 of 10: Account Management Tab Overview

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More ^

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

Search

Reset

Name

Email

Title

NCID

Direct Account

Azalea Troche

azalea.troche@accenture.co

Location Manager

Azalea Troche

Clinic ABC Loc

Shipments

Organization Management

Help & Information

Account Management

The **ACCOUNT MANAGEMENT** tab allows you to create user accounts. You can enter their NCID username and expected role for the location you are logged in under.

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Tips

Learn more about Account Management in the **CVMS Provider Portal User Account Management User Guide**.

Statewide Location Manager Profile: Add a Healthcare Provider Location

Step 1 of 3: click on ADD LOCATION

If you are a Statewide Location Manager, you can add new locations to your selection available when clicking the **ADD LOCATION** button.

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

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Location Manager

HomeRecipientsAppointmentsBulk RegistrationHelp & Information

You are currently logged in as GreatVaccines Loc1

Switch Locations

Add Location

Appointment Walk-In

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

Name

Search Name

Date Of Birth

YYYY-MM-DD

Email

Search Email


Today's Appointments

TIME

DETAILS

CASE NUMBER

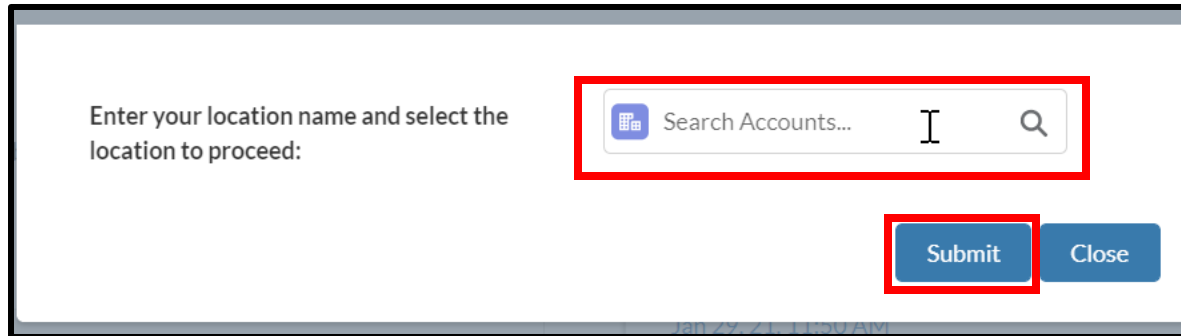
LOCATION

 NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Step 2 of 3: Search and select the location

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



Enter your location name and select the location to proceed:

Search Accounts...

Submit Close

The screenshot shows a web interface for searching locations. It includes a text input field with a magnifying glass icon and a 'Submit' button. The input field and the 'Submit' button are highlighted with red rectangles. The text 'Enter your location name and select the location to proceed:' is displayed to the left of the input field. The 'Close' button is located to the right of the 'Submit' button.

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Step 3 of 3: Switch to the newly added location

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

Audience

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Location Manager



HomeRecipientAppointmentsBulk RegistrationHelp & Information

You are currently logged in as GreatVaccines Loc1

Switch LocationsAdd Location

Appointment Walk-In

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

Name

Search Name

Date Of Birth

YYYY-MM-DD

Today's Appointments

HomeRecipientAppointmentsHelp & Information

You are currently logged in as Test

Switch Locations

Select the location to proceed:

	Location Na...	Street	City	State	Country	Postal Code
<input type="radio"/>	TestLoc1	2110 Blue Ridge Road	Raleigh	North Carolina	USA	27606
<input checked="" type="radio"/>	TestLoc2	2115 Blue Ridge Road	Raleigh	North Carolina	USA	27607

SubmitClose

Appendix

How to Obtain an NCID

Instructions for a user to create an NCID username:

1. Navigate to <https://ncid.nc.gov/>
 2. Click **Register!** (in the bottom right corner of the blue box)
 3. Click **Business** user type option
 4. Complete the required fields to create an NCID
 5. Follow the steps to access your NCID account **and** create your security questions
 6. Once created, you will need to provide your NCID username to the designated Healthcare Location Manager for your location so they can request access to the CVMS Provider Portal for you.
 7. Once access has been granted by NCDHHS, you will be sent an email to notify you that you are able to log in to the CVMS Provider Portal.
- If you have any questions **or need assistance in identifying the Healthcare Location Manager for your location**, please submit all inquiries to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

NCID Tips

NCID

Username

Password

NCID Login

Forgot Username
Forgot Password
Unlock Account





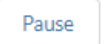
Need Help? **Register!**

Privacy and Other Policies Contact Us

WARNING: This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action. NCC742

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.servicenow.services.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more details on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) browsers 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

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/10/2020	<ul style="list-style-type: none">• Uploaded the first version of the PPT	ALL	Training Team
2	1/10/2021	<ul style="list-style-type: none">• Removed any mention of the 2 CVMS Help Desk emails• Added Service Now Portal information• Screenshot of new bulk upload added	1, 2, 12, 20, 21	Courtney Seward
3	1/15/2021	<ul style="list-style-type: none">• Updated navigation bars for both CVMS Provider Profiles• Updated Recipient Tab search feature	11, 17	Azalea Troche
4	2/1/2021	<ul style="list-style-type: none">• Updated the screen shots for Location manager to show reports tab on nav bar• Added Statewide Profile content• Added Reports tab content and Appointments tab content	8,11,12,13,14,15,16,17, 24	Kristin Clark; Tabitha McKelvy
5	2/12/2021	<ul style="list-style-type: none">• Add Slides for Account Management and Organizational Management• Added session expired tip• Added multi locations slide• Updated screen shots of the expanded more tabs list	9,10,18,19,20,21	Kristin Clark