North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Receiving & Processing Vaccine Shipments User Guide

Version 9
February 14, 2021
If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at [https://ncgov.servicenowservices.com/csm_vaccine](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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COVID-19 Vaccine Inventory Management Overview

Process Overview
Receiving and processing COVID-19 vaccine inventory shipments typically involves:

1. Reviewing the Vaccine Inventory Shipment record
2. Adding Vaccine Inventory
3. Adding inbound COVID-19 vaccine transfers
4. Updating the Vaccine Inventory Record
5. Marking the Vaccine Inventory Record Complete

The processes included in this training are for users with a Healthcare Location Manager profile only.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge (Chromium only) browsers

Now, let’s get started!
Once a COVID-19 vaccine shipment is on its way, the Primary Vaccine Coordinator will receive an email notification.

From the homepage, click to the Shipments page to review shipment information.

A list of shipments will be on the Shipments page.

You will be able to view on this page shipment information, including date shipped, quantity shipped, tracking information, vaccine lot #, NDC #, expiration date, if the shipment is tagged for first dose or second dose, and the manufacturer name.

When you receive a COVID-19 vaccine shipment, you will add the inventory to your location’s overall COVID-19 vaccine inventory.

Navigate to the Vaccine Inventory tab and click add.

Enter all needed details into the prompted fields for the shipped COVID-19 vaccine inventory.

Review and save the inputted information.

Need to make updates to a Vaccine Inventory record? You will be able to edit a few fields including the Extra Doses field and the Vaccine Inventory Record Name. You will also be able to update the Vaccine Inventory Status to Complete when there are no more doses available.

All edits to the Vaccine Inventory record will be tracked.

If you need support, please contact the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine
### Key Terms

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<th>Term</th>
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<tr>
<td><strong>Wastage</strong></td>
<td>Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged or destroyed.</td>
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<tr>
<td><strong>Insufficient Quantity</strong></td>
<td>COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type.</td>
</tr>
<tr>
<td><strong>Vaccine Deprecation</strong></td>
<td>Vaccine Deprecation represents the process in which the amount of COVID-19 vaccines are reduced by the amount of COVID-19 vaccines administrated, wasted, lost or not received.</td>
</tr>
<tr>
<td><strong>Vaccine Inventory Shipment Details</strong></td>
<td>Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC).</td>
</tr>
<tr>
<td><strong>Extra Doses</strong></td>
<td>Extra Doses are any additional doses that are administered beyond what the CDC considers standard doses per vial for the specific COVID-19 vaccine type.</td>
</tr>
<tr>
<td><strong>Redistribution</strong></td>
<td>Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.</td>
</tr>
<tr>
<td><strong>Transfer</strong></td>
<td>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).</td>
</tr>
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Receiving COVID-19 Vaccine Shipment Notification
Step 1 of 4: Navigate to Shipments

It is important to maintain accurate COVID-19 vaccine inventory levels for the location(s) that you support to remain in alignment with the CDC’s COVID-19 vaccine guidelines. Once a COVID-19 vaccine Inventory shipment is on its way, a VACCINE SHIPMENT RECORD will be available for you to review in your SHIPMENTS TAB.

The Primary Vaccine Coordinator will also receive an EMAIL NOTIFICATION when a VACCINE INVENTORY SHIPMENT is on its way to your location.
1. At the top of your home page, locate the MORE TAB
2. Click SHIPMENTS
3. After clicking SHIPMENTS, you will be directed to the SHIPMENTS PAGE

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Tips
The Primary Vaccine Coordinator will be notified when a COVID-19 vaccine shipment is on its way. The Primary Vaccine Coordinator was identified as such during the enrollment process in the CVMS Provider Enrollment Portal.
Step 2 of 4: Switch Shipment Record List Views

You will see a **LIST VIEW** on your page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed list view. To see all your Shipment Records, you will have to switch to the ‘All Shipment’ records list view. You will be able to switch back and forth between list views.

1. Click the **DROP-DOWN MENU** next to the list view name
2. Click **ALL SHIPMENTS**
3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**
Step 3 of 4: Navigate to the Shipment Record

On this page, you will see a list of Vaccine Shipment records for the location(s) you support. The VACCINE SHIPMENT RECORD will be RELATED to an ORDER RECORD. This means that your Vaccine Shipment record will always be associated to a specific order.

1. **Locate the SHIPMENT ID**
2. **Click the SHIPMENT ID HYPERLINK**
3. **You will be directed to the VACCINE SHIPMENT RECORD**

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**Tips**

You can use the SEARCH BAR to search for a record. Clicking on column header will sort by the column. For example, you may choose to sort by SHIPMENT DATE.

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Step 4 of 4: Navigate to the Shipment Details

On the Shipment record, you will be able to review details about your expected order including:

- Date Shipped
- Quantity Shipped
- Tracking Information
- Lot #
- NDC #
- Expiration Date
- Manufacturer
- First Dose or Second Dose tag

1. On the Shipment record, click on the DETAILS TAB

Tips

Review specific details about your order.
COVID-19 Vaccine Shipment Email Notification

Primary Vaccine Coordinators will be notified via EMAIL if a VACCINE SHIPMENT has been processed for location(s) they support. You can expect the email to come from the CVMS Support Team.

The Primary Vaccine Coordinator will receive an email notification for each shipment BY VACCINE TYPE. Details in the email will include:

- Date Shipped
- Quantity Shipped
- Manufacturer
- NDC Number
- Lot Number
- ExIS Order Number
- Carrier
- Shipment Tracking Number

Note: Email will come from nccvms@dhhs.nc.gov
Adding COVID-19 Vaccine Inventory
Step 1 of 7: Navigate to the Vaccine Inventory tab

When you PHYSICALLY RECEIVE a COVID-19 vaccine inventory shipment, you will want to ADD THE INVENTORY to your location’s overall COVID-19 vaccine inventory. Processing your COVID-19 vaccine shipments correctly will ensure that your COVID-19 vaccine levels are accurate for your reporting.

This process DOES NOT include processing inbound COVID-19 vaccine inventory transfers. Please see the next section for steps on how to process inbound transfers.

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
Step 2 of 7: Create a New Vaccine Inventory Record

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. This will be your main working page for ensuring that your inventory levels are accurate. See the CVMS PROVIDER PORTAL INVENTORY DEPRECIATION, TRANSFER, AND REDISTRIBUTION USER GUIDE to learn more about COVID-19 vaccine Wastage, Insufficient Quantities and Redistribution / Transfer processes.

1. Click ADD
2. After clicking add, you will be prompted to PROVIDE ADDITIONAL VACCINE DETAILS

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Tips

By Default, the view is set as “Recently Viewed”, therefore the list will seem empty at first.

Change the view to “All Vaccine Inventories” and click the THUMBNAIL icon to PIN your favorite list view.
Step 3 of 7: Enter Vaccine Inventory Information

The **NEW VACCINE INVENTORY PAGE** will appear.

To search for a picklist value, you need to enter at least **THREE CHARACTERS**.

1. Populate all required **VACCINE INVENTORY FIELDS**
   - Account (Do not create a new Account)
   - Vaccine Inventory Name *(editable)*
   - Expiration Date
   - Date and Time Received
   - Vaccine Product
   - Total Doses
   - Lot #
   - Usage (% first dose / second dose)

2. Continue to **SHIPMENT DETAILS**

For more information on Extra Doses, see page ‘Entering Extra Doses’.

**Tips**

When adding Inventory into CVMS, we recommend including the Lot #’s in the Inventory Name to help staff that are administering vaccines to recipients to more easily choose the correct Inventory record.

Shipments from DIFFERENT LOT NUMBERS must be entered as separate Inventory records.

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For more information on Extra Doses, see page ‘Entering Extra Doses’.
You can now enter the remaining Vaccine Shipment record details.

Do **NOT** reduce the **TOTAL DOSES AMOUNT** if you have wastage or plan to redistribute inventory.

This process **MUST** be recorded separately as **INVENTORY DEPRECIATION**.

1. Select a **SHIPMENT RECORD**
2. If you cannot locate the Shipment record, **CHECK** the **UNABLE TO LOCATE SHIPMENT RECORD** box
3. Before saving, **REVIEW** all entered details
4. Click **SAVE**
Step 5 of 7: Entering Extra Doses

If you know you will have extra doses, you can update the **EXTRA DOSES** field. You will be able to update this field later to reflect the actual number of extra doses administered.

For an example on when to record **EXTRA DOSES**, please see the **INVENTORY INSTRUCTIONS AND ASSISTANCE** image below.

*Note: Entering in Extra Doses is not a required field.*
Step 6 of 7: Review the Vaccine Inventory Record

After clicking save, you will be directed to the VACCINE INVENTORY RECORD. Your total COVID-19 vaccine inventory has now been updated to reflect this additional inventory.

At the top of the record, your VACCINE INVENTORY HIGHLIGHT PANEL will reflect ongoing DOSAGE ACTIVITY for this inventory.

Tips
Review the Highlight Panel at the top of the Vaccine Inventory record.

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Step 7 of 7: Switch Inventory List Views

You will see a LIST VIEW on the vaccine inventory page. A list view is a SUMMARY OF YOUR RECORDS. By default, you may be directed to the Recently Viewed List View. To see all your Inventory Records, you will have to switch to the All Vaccine Inventory Records list view. You will be able to switch back and forth between list views.

1. Click the DROP-DOWN MENU next to the list view name
2. Click ALL VACCINE INVENTORIES
3. If you want to make your selection your default list view, click the THUMBNAI LICON

Tips
Click the THUMBNAI L icon to PIN your favorite list view.

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Declare Vaccine Allocation Availability
Step 1 of 2: Navigate to the Account Record (Location)

You will be able to adjust your availability to receive COVID-19 vaccine inventory each week for your location in the CVMS Provider Portal. It is important that you UPDATE YOUR AVAILABILITY BY MONDAY AT 10:00 AM EACH WEEK if you want your adjustment to be considered for vaccine allocation planning.

If you indicate YES, that means your location is able to receive COVID-19 vaccine inventory that week if allocated. If you indicate NO because you do not have storage or capacity, your location will not be allocated COVID-19 vaccine inventory until you update your preference.

1. From the Vaccine Inventory tab, click the ACCOUNT NAME (LOCATION) on any row of the list of Inventories.

Tips
If you have multiple locations, make sure to update each location’s Allocation Availability each week as appropriate.
Step 2 of 2: Update Your Location’s Availability to Receive COVID-19 Vaccine Inventory

From your Account (Location) Record, you can use the **CHANGE ALLOCATION AVAILABILITY** button to certify that your location is able to receive and administer additional vaccine if allocated. This **VALUE DOES NOT RESET OR AUTOMATICALLY UPDATE EACH WEEK.** It will remain the same as the last updated value until you change it.

1. From the Account Record (Location,) click the **CHANGE ALLOCATION AVAILABILITY** button
2. Select **YES** or **NO** from the drop-down menu
3. Click **SAVE**
Receiving a COVID-19 Vaccine Transfer / Redistribution
Step 1 of 4: Processing an Inbound Transfer

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

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

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

Tips

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

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Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** records that are incoming transfers / redistributions 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**
Step 3 of 4: Complete the Inbound Transfer form

Once you select the correct Vaccine Inventory record, you will see the Vaccine Inventory record 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 transfer / redistribution is now processed.

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

**Tips**

- Identify doses received and date received for the Vaccine Inventory.

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Step 4 of 4: Complete the Inbound Transfer

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

1. Click **FINISH**
Updating Vaccine Inventory Record Details
Step 1 of 3: Navigate to the Vaccine Inventory tab

1. At the top of your home page, locate the VACCINE INVENTORY tab
2. Click VACCINE INVENTORY
3. After clicking VACCINE INVENTORY, you will be directed to the VACCINE INVENTORY list view
Step 2 of 3: Navigate to Vaccine Inventory Record

Use the All Vaccine Inventories List View to locate the specific record you need to update. You can SEARCH or SORT in the list view.

1. Identify the VACCINE INVENTORY RECORD that you wish to update
2. Click the VACCINE INVENTORY NAME HYPERLINK
Step 3 of 3: Update the Vaccine Inventory Record

Before you edit, make sure you are on the appropriate record.

**Remember, you must always save your changes.**

1. Click the **EDIT BUTTON** on the right-hand side
2. Locate the field you want to make changes to
3. Update the field
4. Click **SAVE**
5. If the field does not update, click **REFRESH** and try again

**Tips**

Vaccine Inventory Status can be edited by Completing the Vaccine Inventory (Review next section).

If additional doses of the Vaccine Inventory are identified, use the Extra Doses field to edit that Inventory directly.

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Reviewing Vaccine Inventory History

All changes and edits made to the Vaccine Inventory Record are captured within the CVMS Provider Portal in the Vaccine Inventory History.

1. From the Vaccine Inventory Record, click on the RELATED tab.
2. Scroll down to VACCINE INVENTORY HISTORY
3. Review all Vaccine Inventory History

Click View All to look at all the Vaccine Inventory History changes made to the record.
Mark a Vaccine Inventory as Complete or Reserved for Future Use
Step 1 of 3: Navigate to Vaccine Inventory Record

When a Vaccine Inventory record has zero available dose left, and no extra dose can be extracted from the vials, you will be able to update the Vaccine Inventory record status as Complete. This will help the NCDHHS allocation team to identify which Vaccine Inventory records do not have any remaining doses to be administered.

1. From the VACCINE INVENTORY TAB, identify the VACCINE INVENTORY RECORD that you wish to update
2. Click the VACCINE INVENTORY NAME HYPERLINK
Step 2 of 3: Click the Change Status Button

1. At the top of the Vaccine Inventory page, locate the CHANGE STATUS button
2. Click the CHANGE STATUS button
Step 3 of 3: Select the Complete Status & Save

You will be prompted to update the STATUS. Once you save your changes, the Vaccine Inventory status will update accordingly. Definitions for each status are provided on this screen to ensure you select the appropriate STATUS.

1. Select the appropriate STATUS
   - Complete
   - Reserved for Future Use
   - Available
   - Transferred
   - Wasted
   - Incoming Transfer in Transit

2. Click SAVE

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Tips
Use this feature to update the Vaccine Inventory status to Complete when you have zero doses available.
Failed Complete Status Update

The alert screen below will be displayed if your doses available does not equal 0. You will be unable to update the Vaccine Inventory Status to Complete until the appropriate adjustments are made to your Vaccine Inventory. Once resolved, you can go back and Complete the Vaccine Inventory Status.
Reserved for Future Use Status

Putting a Vaccine Inventory Record in the **RESERVED FOR FUTURE USE** status will remove it from being displayed on the vaccination administration screen for Healthcare Providers to select when vaccinating recipients.

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**Tips**

This status may be helpful to flag Inventory Records at a location that should not be selected by Healthcare Providers when vaccinating recipients (e.g., reserved for second dose, reserved for upcoming mass vaccination clinic, flagged for transfer or redistribution).
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.
- 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 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

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<tr>
<td>1</td>
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<td>• Original version</td>
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<td>2</td>
<td>12/21/2020</td>
<td>• Updated shipment email notification</td>
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<td>• New slides on List Views and Account (Location) Record</td>
<td>• 10, 20, 21, 22</td>
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<td>3</td>
<td>12/31/2020</td>
<td>• Tips on adding inventories</td>
<td>• 10, 16, 17</td>
<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, 6, 13, 29, 30</td>
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<td>• Add reports tab on navigation bar</td>
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<td>• Extra Doses</td>
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<td>• Complete Vaccine Inventory</td>
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<td>• Updated screen shots to show new nav bar</td>
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