North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Reports User Guide

Version 1
January 31, 2020
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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Reports in the CVMS Provider Portal
A report is a list of records that meet defined criteria. It is displayed in the CVMS Provider Portal in rows and columns, and can be filtered and sorted, or exported into Excel. It shows the latest data, and automatically updates as each record updates. This user guide will show you:

1. How to access the reports
2. How to filter or export report data
3. What reports are available in the CVMS Provider Portal

Only users with a Healthcare Location Manager profile can access available reports. They cannot create new reports or add new fields to the existing reports.

Additional requirements:

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

Now, let’s get started!
Reports available in the CVMS Provider Portal

There are three separate reports currently available for Healthcare Location Managers:

1. **HCP Healthcare Roles Report** - identify all users and associated roles at the location of the logged-in user
2. **Inventory Summary Report** - view your location(s) COVID-19 vaccine inventories
3. **Recipient Vaccination Report** - view all recipient vaccination details of your location
Accessing Reports
Accessing Reports

All reports that can be accessed by a Healthcare Location Manager can be viewed in the **ALL REPORTS** section.

1. Once logged in, click the **REPORTS** tab on the navigation bar.
   - If you do not see a **REPORTS** tab, click on the **MORE** drop-down and locate **REPORTS**.
2. Select **ALL REPORTS** on the side menu.
3. Click on the **NAME OF THE REPORT** you wish to run.

**Note**

The page displayed when clicking the **REPORTS** tab will include standard fields and features that cannot be leveraged with your current profile level. Views named 'Created by Me', 'Private Reports', 'Shared with Me', and 'All Favorites' will not display any reports.

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- **Healthcare Location Manager**
Filtering and Formatting Reports
Applying Filters

FILTERS can be accessed through the filter button ▼ on a report to modify the criteria that were set for the report. Each report will have a different list of filters available.

1. Click the FILTER icon.
2. Click the different filter’s criteria fields.
3. Select the appropriate filter using the drop-down menus.
4. Click APPLY to view results.

Audience

Healthcare Location Manager

Tips

You can revert to the default filters on any report by refreshing your webpage.
Removing Filters

It is sometimes possible to remove some filter’s criteria. Any criteria that is eligible to remove from the filter is identified via the **DELETE** icon.

1. Click the **FILTER** icon ▼
2. Click the **DELETE** icon 🗑️ on eligible filter’s criteria
Several buttons are available to change the format of the Reports:
Formatting Reports

1. Show or hide **TOGGLE CHART** by hitting the Chart button 🔄 or 🔄 Add Chart located at the top-right of the report; the Chart displays the number of records per location.

2. Show or hide **ROW COUNTS** by clicking the Row Counts button 🔄 Row Counts located at the bottom to show or hide the Total Records count field displayed at the top left of the report.

3. Show or hide **DETAIL ROWS** by clicking the Row Counts button 🔄 Detail Rows located at the bottom to show or hide the records’ details (one row = one record).

4. Show or hide **SUBTOTALS** by clicking the Row Counts button 🔄 Subtotals located at the bottom to show or hide the row Subtotals which is the last row of the location.

5. Show or hide **GRAND TOTAL** by clicking the Row Counts button 🔄 Grand Total at the bottom of the report to show or hide the Totals displayed at the top of the report.

**Audience**

**Healthcare Location Manager**

**Tips**

You can revert to the default format on any report by refreshing your webpage.

Formatting changes made to a report will carry over to the Format Report export option.
Search a Value within a report

Use the **SEARCH** feature at the top of the report to identify records containing values matching key words.

1. Click on the **SEARCH BUTTON.**
2. Type a key word within the **SEARCH BAR.**
3. Each value within the report matching the key word will be highlighted in yellow.
4. You can navigate from one search result to the next by hitting the up and down buttons that appears within the search bar.
Exporting Reports
Step 1 of 3: Exporting Reports

Reports can be exported into formatted or unformatted Excel or CSV file formats.

1. Open the report, click on **EXPORT**
Step 2 of 3: Formatting Reports

1. Select **FORMATTED REPORT** or **DETAILS ONLY**
   - You can export your report with the same formatting, column summaries, and totals as are visible when you run the report, into the Excel file format (.xlsx) by selecting **FORMATTED REPORT**.
   - For a version of your report with just the records, select **DETAILS ONLY**.

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**Tips**

Review the previous section to see how to change the format and filters of a report.
Step 3 of 3: Exporting Reports

1. To change the file format, use the **FORMAT** drop-down to select either **EXCEL .XLSX** or **COMMA DELIMITED .CSV**.
2. Click on **EXPORT**.
3. You will see your export appear at the **BOTTOM OF YOUR BROWSER** (or in your **DOWNLOADS FOLDER**).
Discovering Available Reports
View the list of your location’s users with access to the CVMS Provider Portal as well as their assigned roles.

**INFORMATION DISPLAYED:**
- First name, last name, type of user, email address, and last login date and time

**FILTERS AVAILABLE:**
- Last Login Time and Date
- Note: Filter ‘Show Me All Users’ cannot be modified

**Note:** A user associated to more than one location will only be able to see this specific report for the location that they have selected under the Location of Operation when they accessed the CVMS Provider Portal. To see this specific report for their other locations, the user will have to select the other location under the Location of Operation and then come back to this report. For more information on how to select a Location of Operation, please see the **CVMS Provider Portal Vaccine Administration User Guide**.
Inventory Summary Report

View your locations’ inventory summary details.

INFORMATION DISPLAYED:

- Inventory Record: inventory name, lot number, Product name, NDC, Expiration Date, Date and Time Received, Inventory Status (Available, Complete, Wasted, Reserved for Future use)
- Quantities: doses available, doses administered, doses wasted, doses transferred, doses lost in transit, total doses and extra doses

FILTERS AVAILABLE:

- Created Dates: filter on inventory received dates, inventory expiration date, transfer date, record creation date, etc.
- Note: Filter ‘All Vaccine Inventories’ should not be modified.

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Note

DOSES AVAILABLE =

Total Doses + Extra Doses
MINUS

- Doses Administered
- Doses Wasted
- Doses transferred
- Doses lost in transit

A user associated to more than one location will see inventory information associated to each of these locations.
Recipient Vaccination Report

View all recipient vaccination details of your location.

**INFORMATION DISPLAYED:**

- Vaccination details: date and time, injection site, route, vaccine status (dose 1 administered, dose 2 administered), product, lot number, inventory name, administered by, notes
- Recipient details: last name, first name, birthdate, age, phone, email address, race, ethnicity, gender, priority tier group, contact county, eligibility status
- Location details: vaccine administration county, address

**FILTERS AVAILABLE:**

- Vaccine Status: click the remove button to see all appointment status (including those Registered, Canceled or Scheduled)
- Appointment Date Time: filter on Date/Time Closed, Opened, Date and Time of Vaccination, Date of Birth, Last Modified Date
- Note: Filters ‘All Appointments’ and ‘VTrckS ID’ should not be modified

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**Tips**

A user associated to more than one location will see vaccination information associated to each of these locations.
Appendix
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>
<td>1/31/2021</td>
<td>• Initial document</td>
<td></td>
<td>Darrell Lee</td>
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