North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Reports User Guide

Version 1

January 31, 2020

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

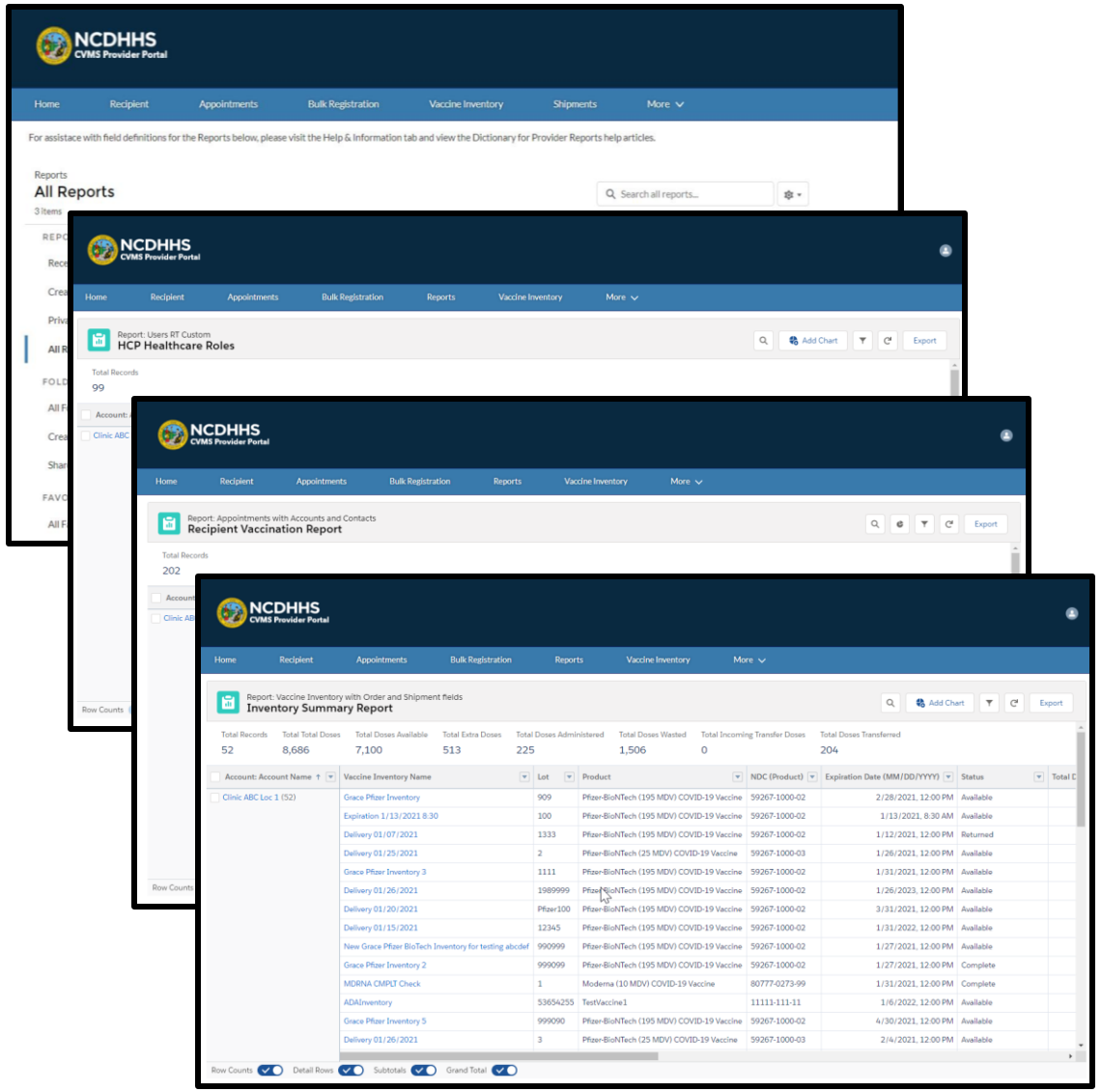
   NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the 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

Table of Contents

Reports in the CVMS Provider Portal

Overview



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.
- Log in the CVMS Provider Portal with your NCID username and password at https://covid-vaccine-provider-portal.ncdhhs.gov.

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

Audience

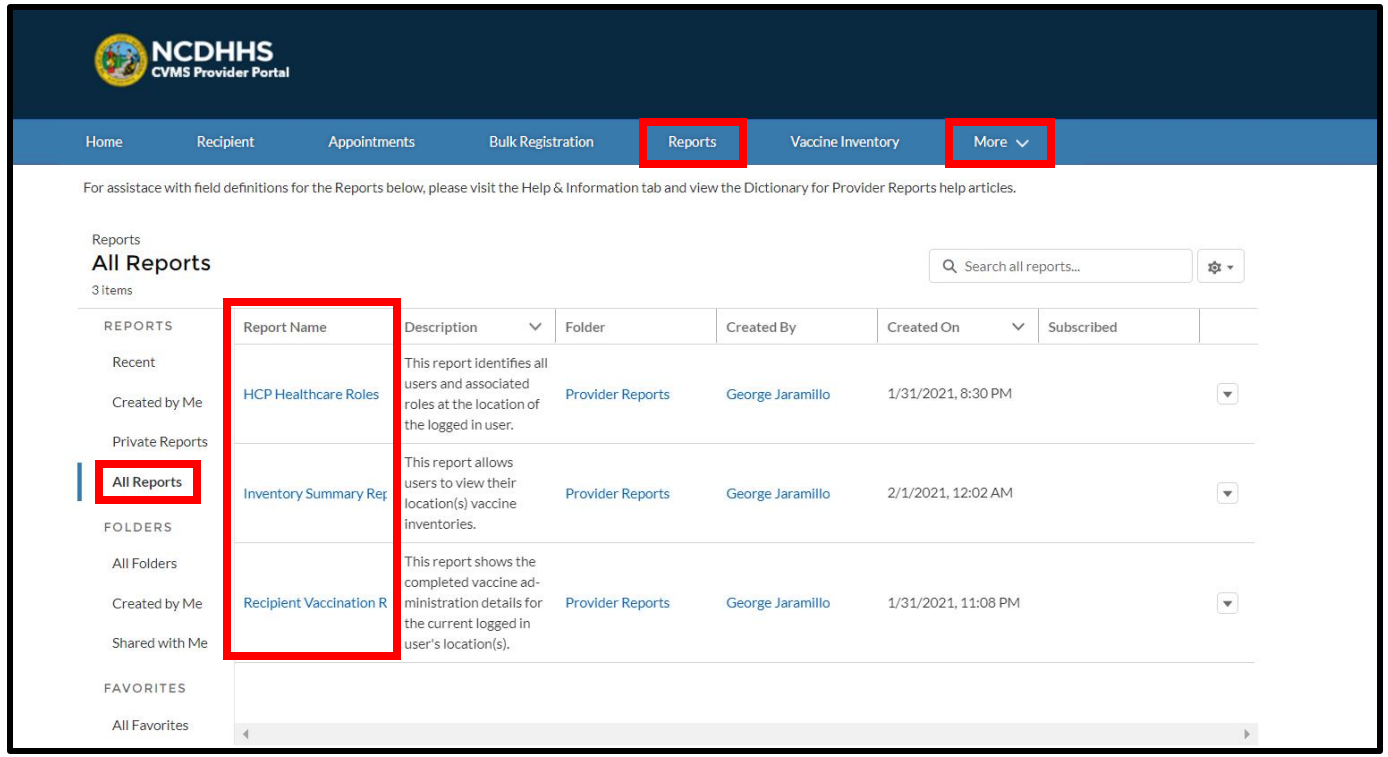
Healthcare Location Manager

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.



Audience

Healthcare Location Manager

Note

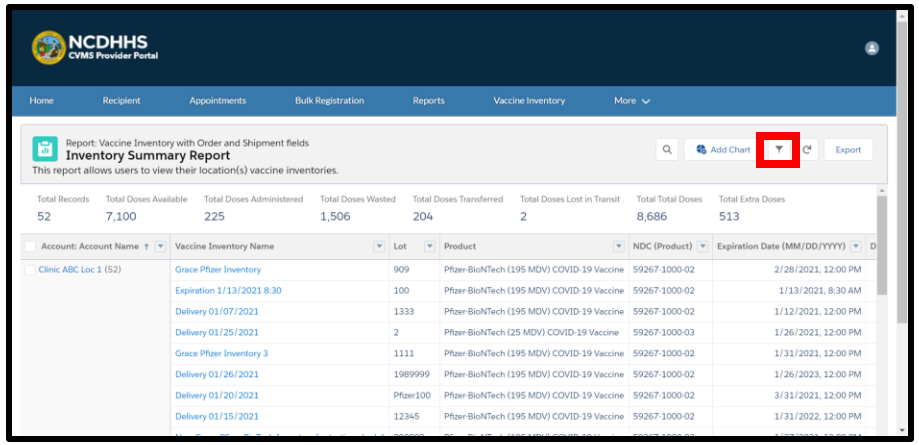
The page displayed when clicking the **REPORTS** tab will include standard fields and features that cannot be leveraged with your current profile level. Views named 'Created by Me', 'Private Reports', 'Shared with Me', and 'All Favorites' will not display any reports.

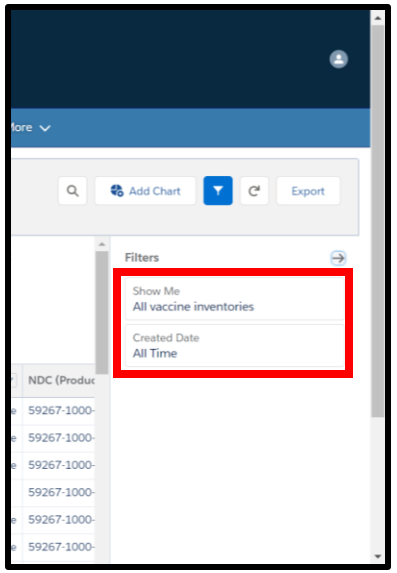
Filtering and Formatting Reports

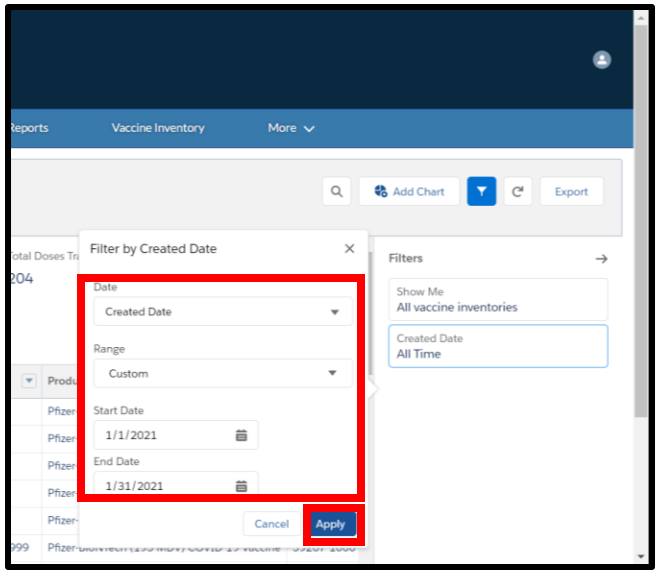
Applying Filters

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

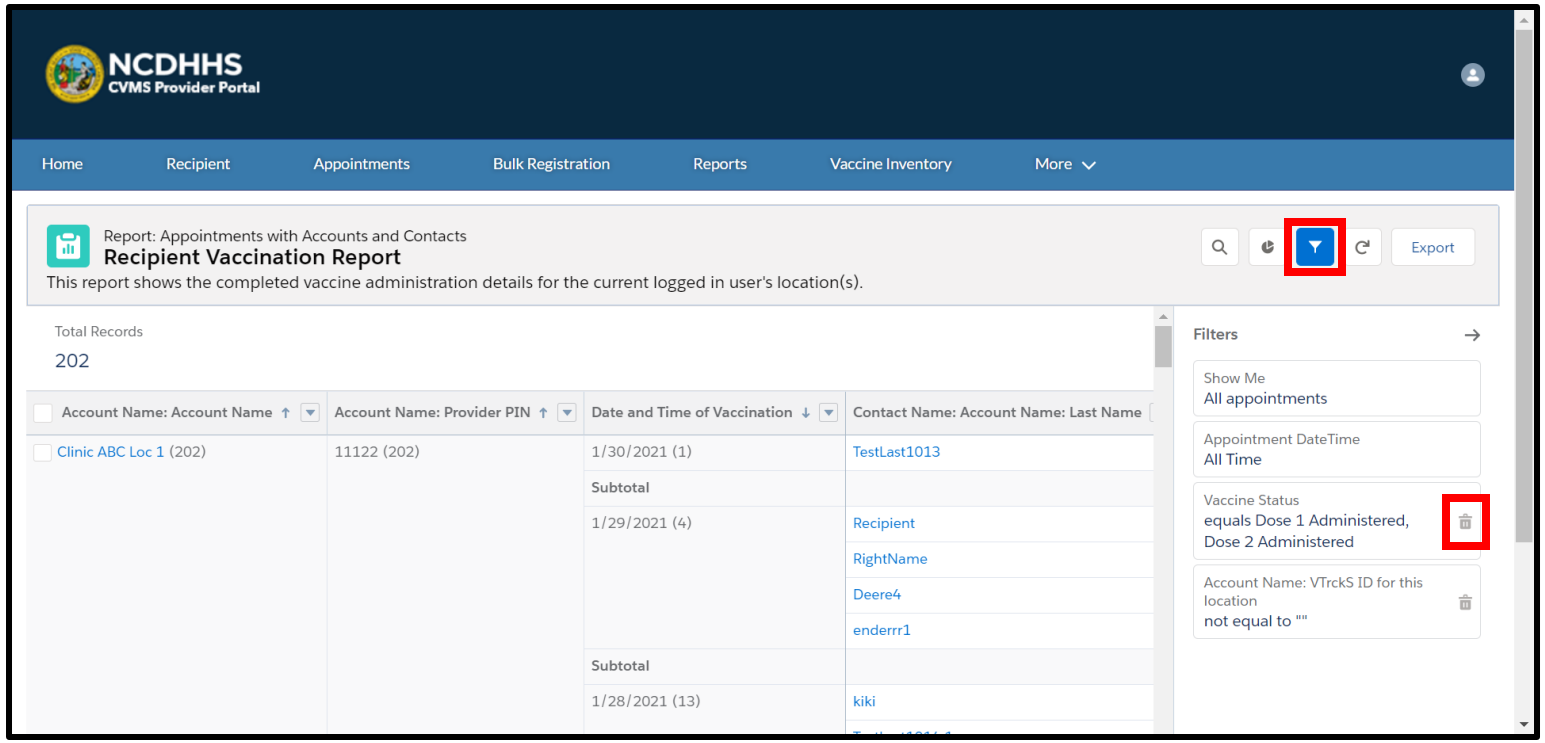
Tips

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



Audience

Healthcare Location Manager

Formatting Reports

Several buttons are available to change the format of the Reports:

NCDHHS
CVMS Provider Portal

Home | Recipient | Appointments | Bulk Registration | Reports | Vaccine Inventory | More

Report: Vaccine Inventory with Order and Shipment fields
Inventory Summary Report
This report allows users to view their location(s) vaccine inventories.

Add Chart | Export

Total Records	Total Doses Available	Total Doses Administered	Total Doses Wasted	Total Doses Transferred	Total Doses Lost in Transit	Total Total Doses	Total Extra Doses
52	7,098	227	1,506	204	2	8,686	513

Account: Account Name	Vaccine Inventory Name	Lot	Product	NDC (Product)	Expiration Date (MM/DD/YYYY)	Date and Time Received (MM/
Clinic ABC Loc 1 (52)	Grace Pfizer Inventory	909	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	2/28/2021, 12:00 PM	1/12/20
	Expiration 1/13/2021 8:30	100	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/13/2021, 8:30 AM	1/12/
	Delivery 01/07/2021	1333	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/12/2021, 12:00 PM	1/7/
	Delivery 01/25/2021	2	Pfizer-BioNTech (25 MDV) COVID-19 Vaccine	59267-1000-03	1/26/2021, 12:00 PM	1/25/
	Grace Pfizer Inventory 3	1111	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/31/2021, 12:00 PM	1/26/20
	Delivery 01/26/2021	1989999	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/26/2023, 12:00 PM	1/26/
	Delivery 01/20/2021	Pfizer100	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	3/31/2021, 12:00 PM	1/15/
	Delivery 01/15/2021	12345	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/31/2022, 12:00 PM	1/15/20
	New Grace Pfizer BioTech Inventory for testing abcdef	990999	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/27/2021, 12:00 PM	1/25/
	Grace Pfizer Inventory 2	999099	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	1/27/2021, 12:00 PM	1/25/
	MDRNA CMPLT Check	1	Moderna (10 MDV) COVID-19 Vaccine	80777-0273-99	1/31/2021, 12:00 PM	1/25/
	ADAInventory	53654255	TestVaccine1	11111-111-11	1/6/2022, 12:00 PM	1/12/
	Grace Pfizer Inventory 5	999090	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine	59267-1000-02	4/30/2021, 12:00 PM	1/26/

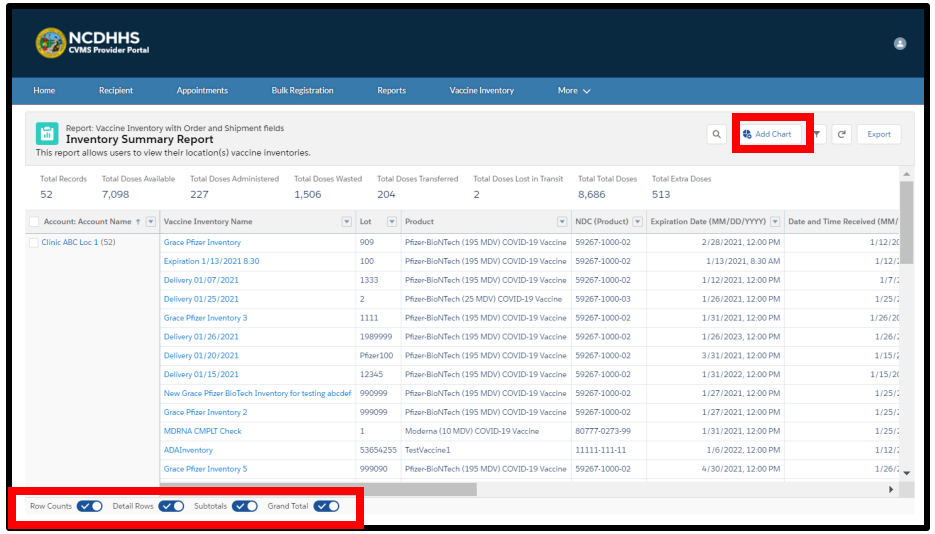
Row Counts | Detail Rows | Subtotals | Grand Total

Audience

Healthcare Location Manager

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

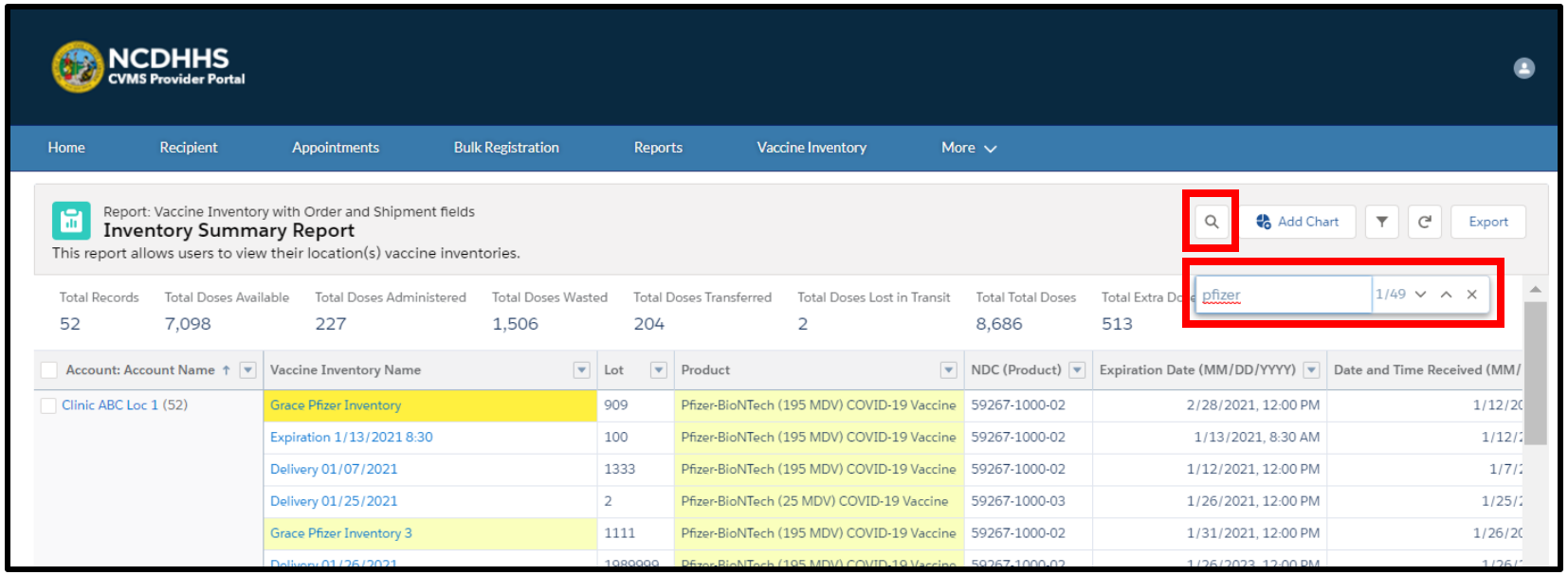
You can revert to the default format on any report by refreshing your webpage.

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.** Search report table...
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. 1/49



Audience

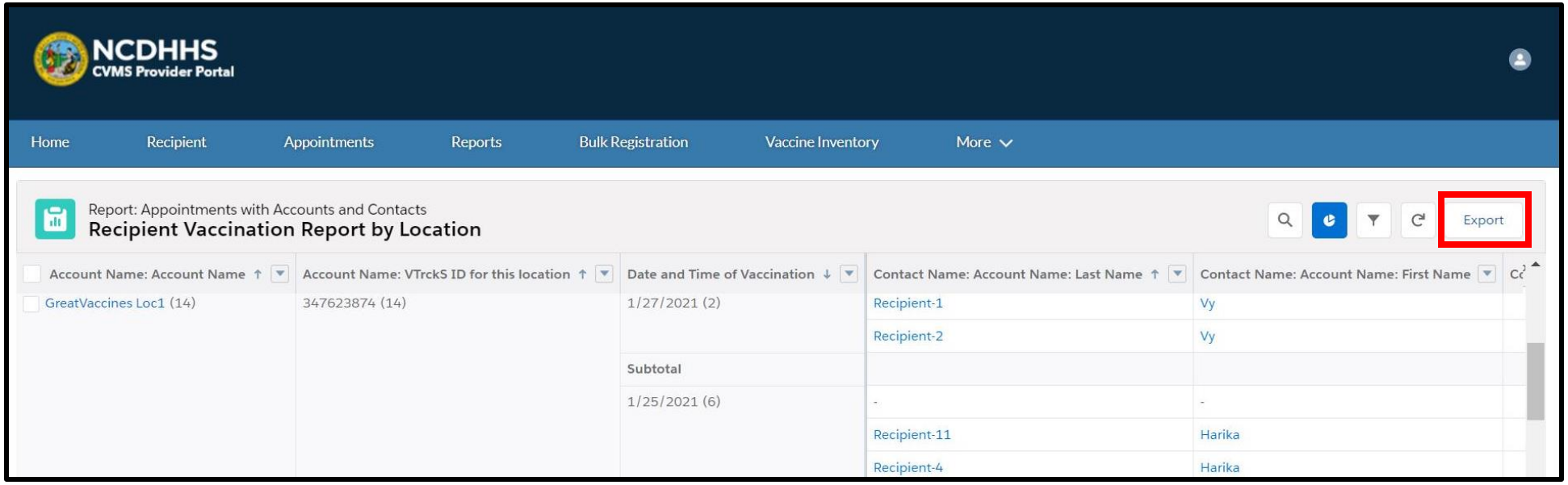
Healthcare Location Manager

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**

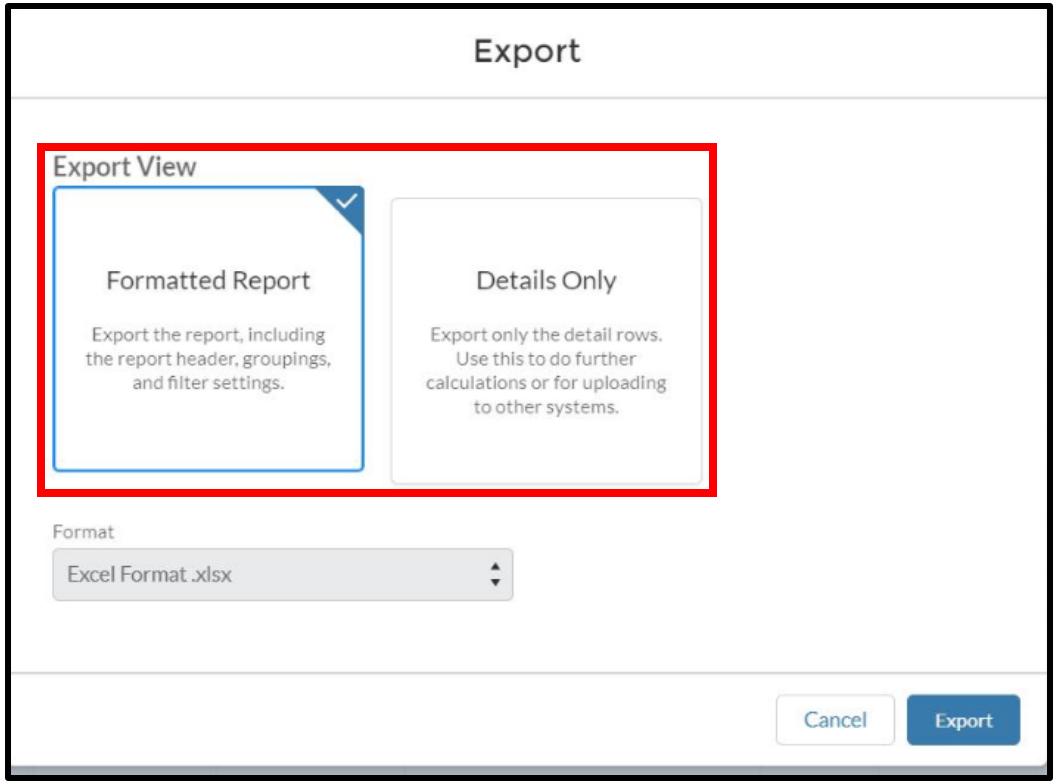


Audience

Healthcare Location Manager

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.**



Audience

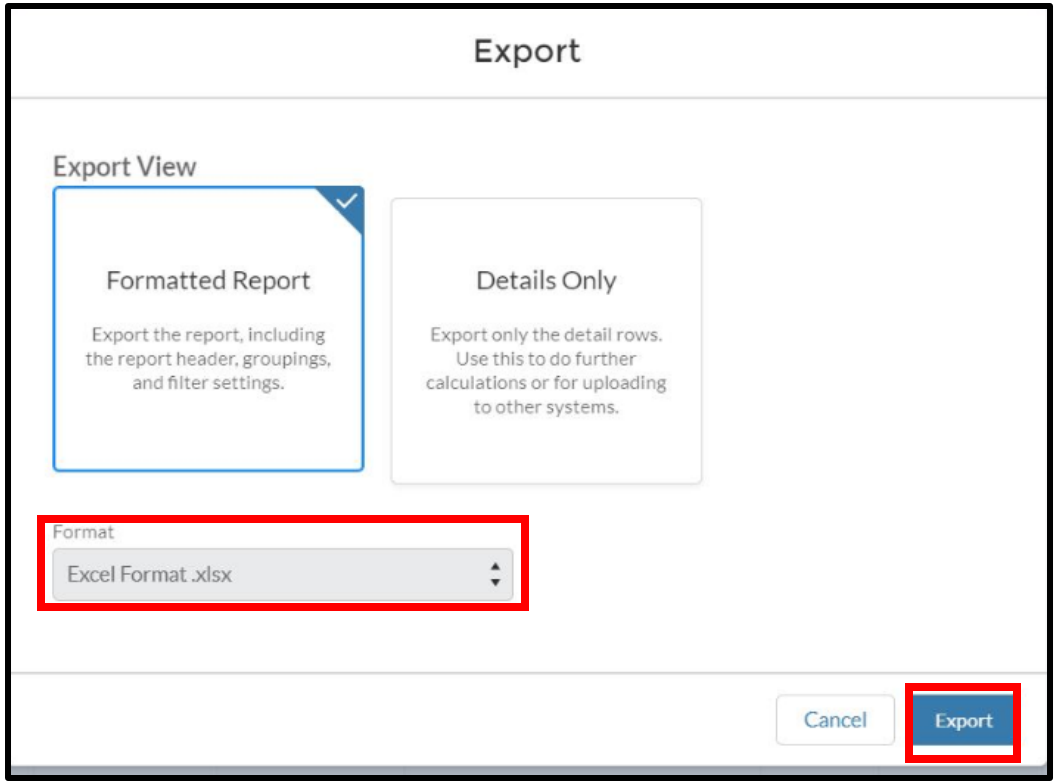
Healthcare Location Manager

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).**

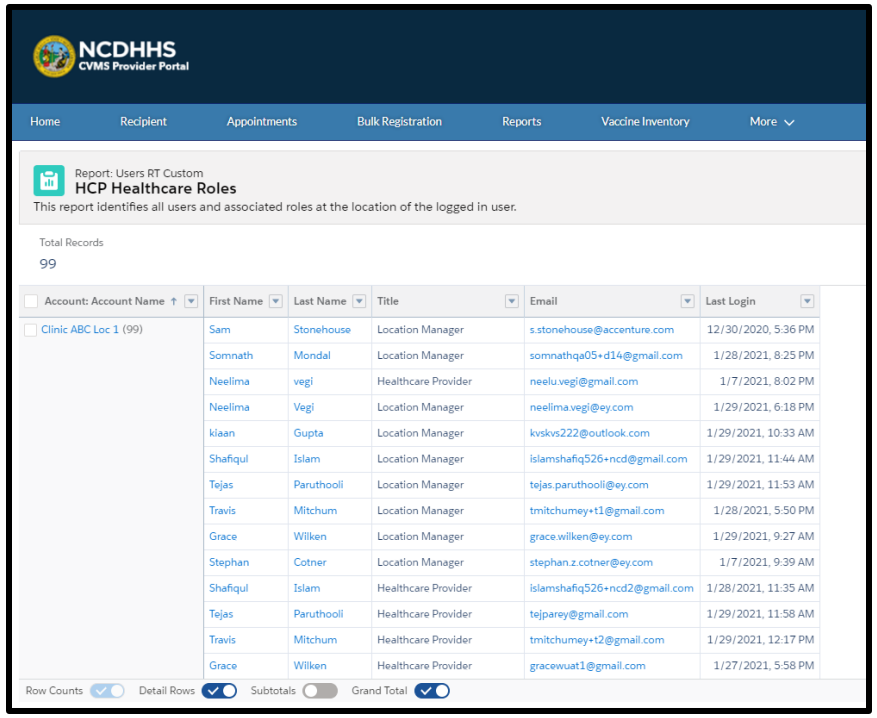


Audience

Healthcare Location Manager

Discovering Available Reports

HCP Healthcare Roles Report



Account: Account Name	First Name	Last Name	Title	Email	Last Login
Clinic ABC Loc 1 (99)	Sam	Stonehouse	Location Manager	s.stonehouse@accenture.com	12/30/2020, 5:36 PM
	Somnath	Mondal	Location Manager	somnathqa05+d14@gmail.com	1/28/2021, 8:25 PM
	Neelima	vegi	Healthcare Provider	neelu.vegi@gmail.com	1/7/2021, 8:02 PM
	Neelima	Vegi	Location Manager	neelima.vegi@ey.com	1/29/2021, 6:18 PM
	kiaan	Gupta	Location Manager	kvskvs222@outlook.com	1/29/2021, 10:33 AM
	Shafiqul	Islam	Location Manager	islamshafiq526+ncd@gmail.com	1/29/2021, 11:44 AM
	Tejas	Paruthooli	Location Manager	tejas.paruthooli@ey.com	1/29/2021, 11:53 AM
	Travis	Mitchum	Location Manager	tmitchumey+t1@gmail.com	1/28/2021, 5:50 PM
	Grace	Wilken	Location Manager	grace.wilken@ey.com	1/29/2021, 9:27 AM
	Stephan	Cotner	Location Manager	stephan.z.cotner@ey.com	1/7/2021, 9:39 AM
	Shafiqul	Islam	Healthcare Provider	islamshafiq526+ncd2@gmail.com	1/28/2021, 11:35 AM
	Tejas	Paruthooli	Healthcare Provider	tejparey@gmail.com	1/29/2021, 11:58 AM
	Travis	Mitchum	Healthcare Provider	tmitchumey+t2@gmail.com	1/29/2021, 12:17 PM
	Grace	Wilken	Healthcare Provider	gracewuat1@gmail.com	1/27/2021, 5:58 PM

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

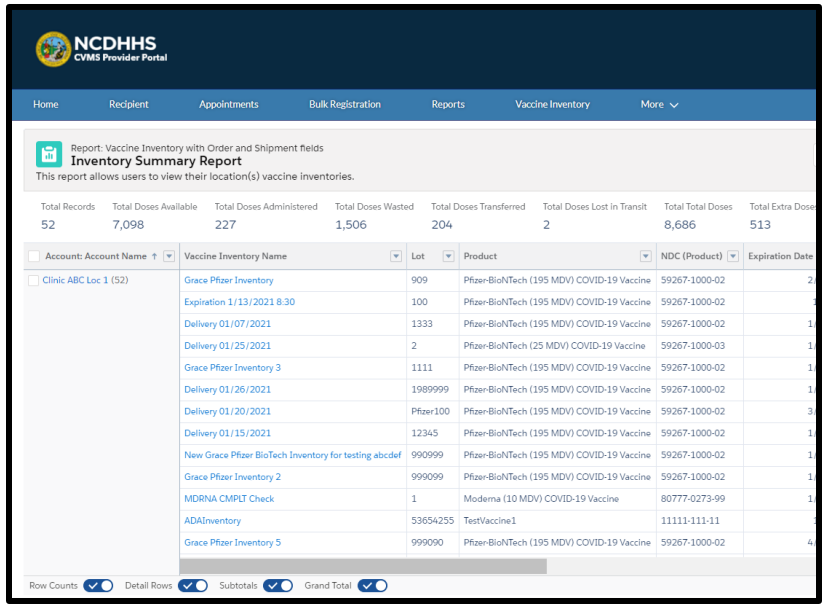
Audience

Healthcare Location Manager

Tips

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 the 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.

Audience

Healthcare Location Manager

Tips

DOSES AVAILABLE =

Total Doses **+** Extra Doses

MINUS

(**-** Doses Administered

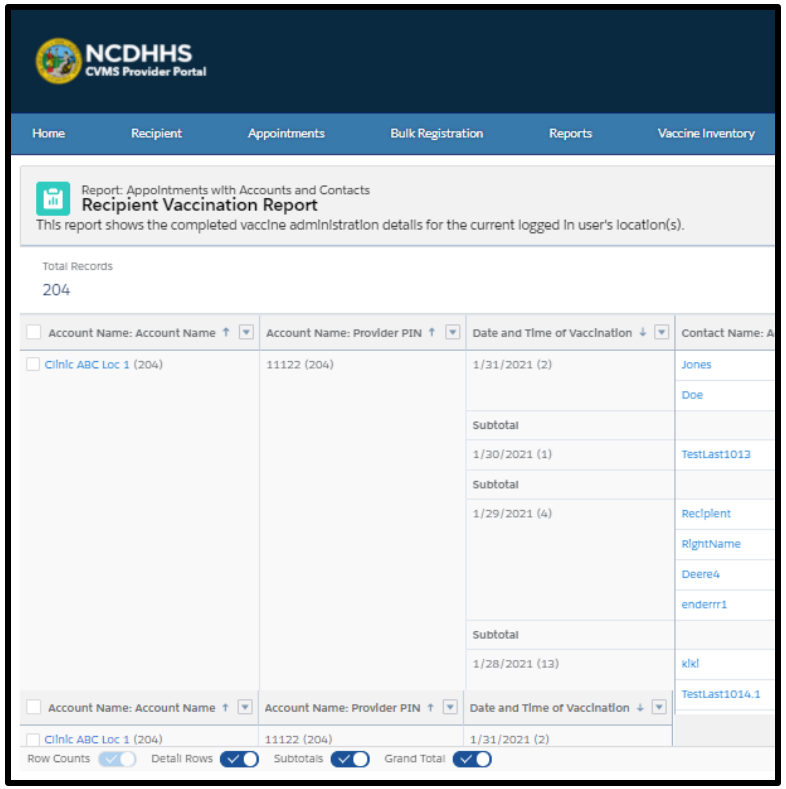
- Doses Wasted

- 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

Audience

Healthcare Location Manager

Tips

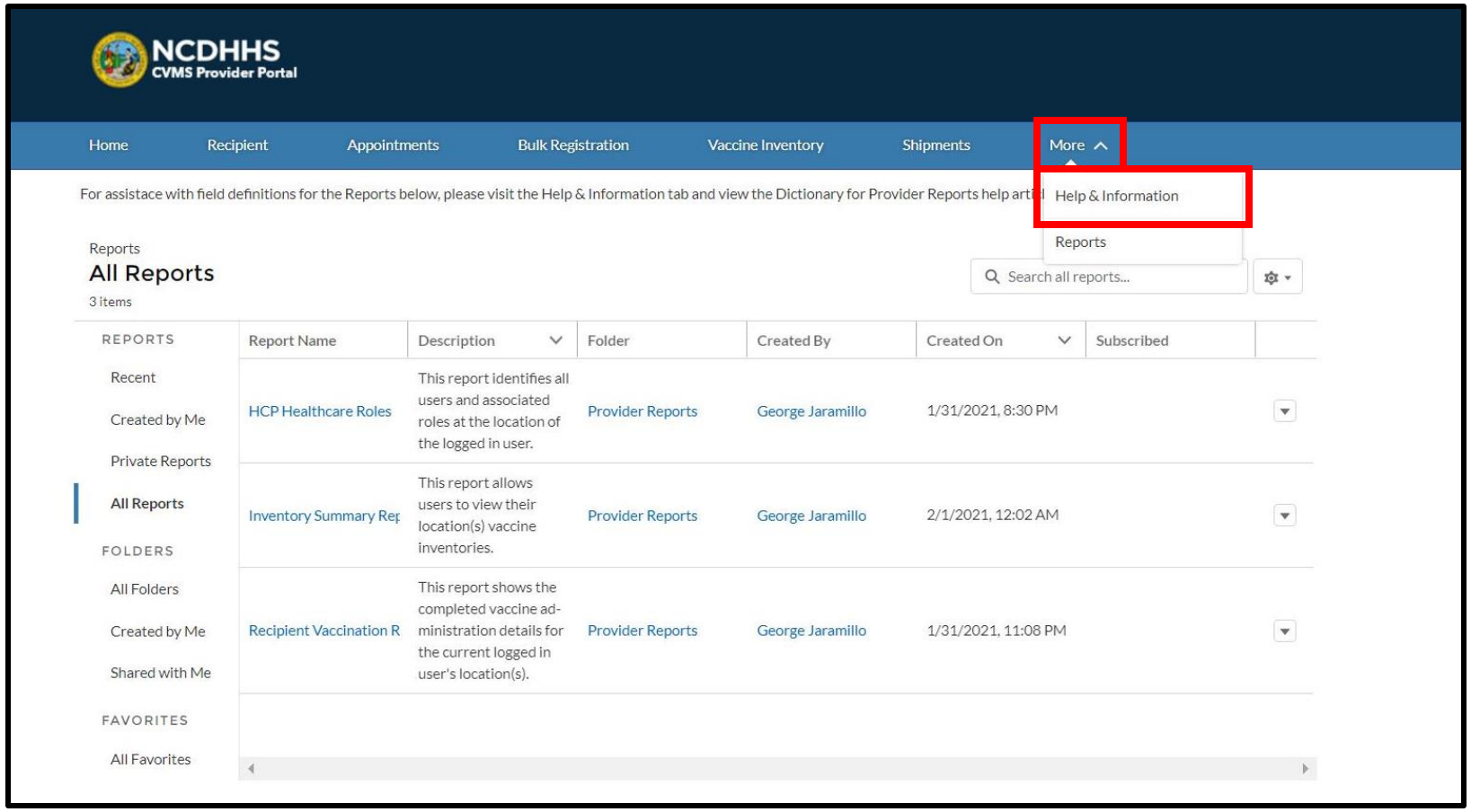
A user associated to more than one location will see vaccination information associated to each of these locations.

Accessing Data Dictionaries in the Help & Information tab

Accessing Help & Information

Find the Help & Information section to see detailed information for each type of report.

1. Navigate to **MORE** on the Menu Bar then select **HELP & INFORMATION**

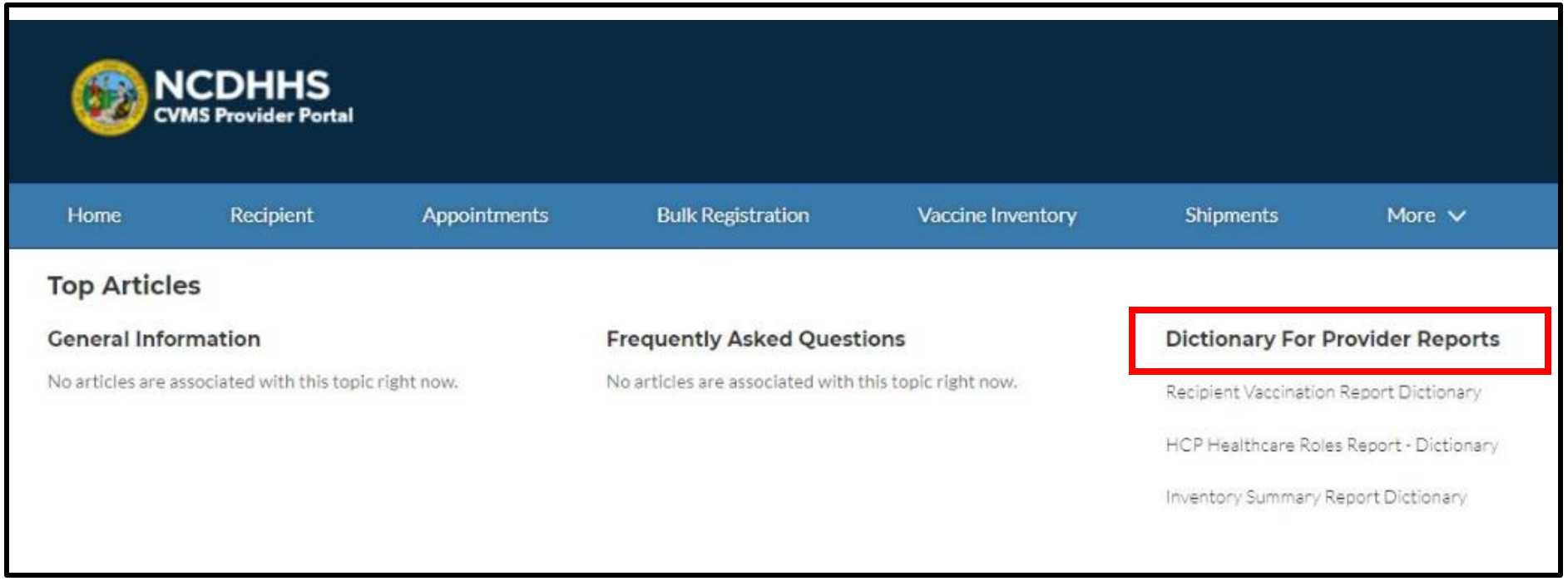


Audience

Healthcare Location Manager

Dictionary for Provider Reports

1. Navigate to and click on the **DICTIONARY FOR PROVIDER REPORTS** to see associated articles.

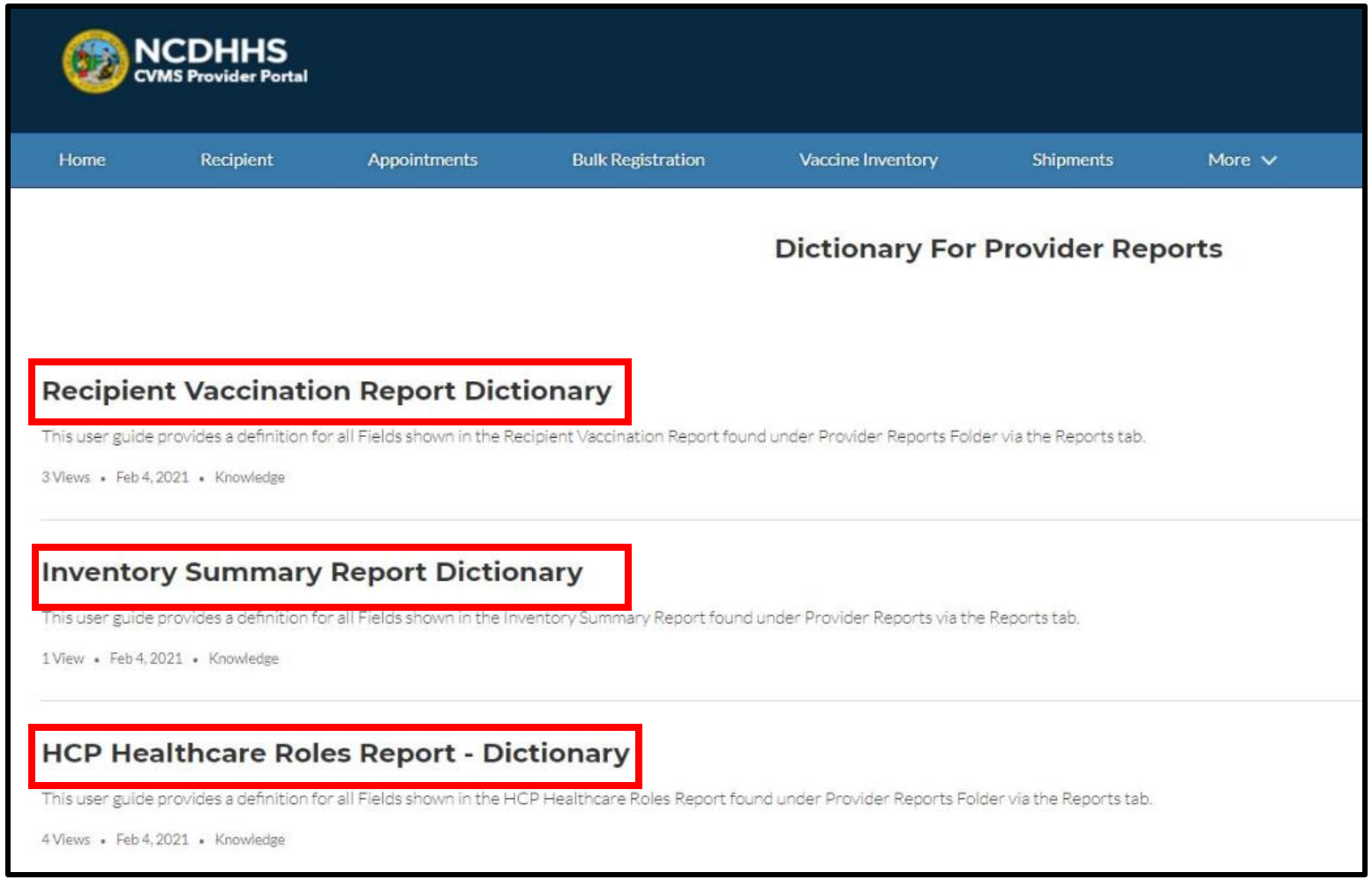


Audience

Healthcare Location Manager

Selecting Articles in the Dictionary for Provider Reports

1. Select the desired article to view.



Audience

Healthcare Location Manager

Recipient Vaccination Report Dictionary

1. Each dictionary will provide a detailed list of terms for each report available.

Home | Recipient | Appointments | Bulk Registration | Vaccine Inventory | Shipments | More

DICTIONARY FOR PROVIDER REP...

Recipient Vaccination Report Dictionary

This user guide provides a definition for all Fields shown in the Recipient Vaccination Report found under Provider Reports Folder via the Reports tab.

Feb 4, 2021 • Knowledge

Title
Recipient Vaccination Report Dictionar

Summary
This user guide provides a definition for

Content
This report is *only* viewable by Healthc

Section	Field
Details	Account Name: Account Name
Details	Account Name: Provider PIN
Details	Date and Time of Vaccination
Details	Contact Name: Account Name: L
Details	Contact Name: Account Name: F
Details	Contact Name: Birthdate
Details	Contact Name: Age
Details	Contact Name: Home Phone

Home | Recipient | Appointments | Bulk Registration | Vaccine Inventory | Shipments | More

DICTIONARY FOR PROVIDER REP...

Inventory Summary Report Dictionary

This user guide provides a definition for all Fields shown in the Inventory Summary Report found under Provider Reports via the Reports tab.

Feb 4, 2021 • Knowledge

Title
Inventory Summary Report Dictionary

Summary
This user guide provides a definition for all Fields shown in the Inventory Summary Report found under

Content
This report is *only* viewable by Healthcare Organization Admins and Healthcare Location Managers.

Field	Definitions
Account: Account Name	The Vaccine Provider location name
Vaccine Inventory Name	The name of the Vaccine Inventory Is given default name "Delivery MM/D
Lot	Unique identifier for the received Vaccine product's batch
Product	The Manufacturer of the Vaccine Product
NDC (Product)	Each Listed drug product is assigned a 10-digit, 3-segment number The id
Expiration Date (MM/DD/YYYY)	The date the Vaccine Product and all associated dosage is unusable
Status	Indicates the current state of Vaccine Product, can be; Complete, Reserve
Date and Time Received (MM/DD/YYYY)	The date and time the Vaccine Product was received by the Location This
Total Doses	Sum of all Doses when inventory records were initially created, prior to re

Home | Recipient | Appointments | Bulk Registration | Vaccine Inventory | Shipments | More

DICTIONARY FOR PROVIDER REP...

HCP Healthcare Roles Report - Dictionary

This user guide provides a definition for all Fields shown in the HCP Healthcare Roles Report found under Provider Reports Folder via the Reports tab.

Feb 4, 2021 • Knowledge

Title
HCP Healthcare Roles Report - Dictionary

Summary
This user guide provides a definition for all Fields shown in the HCP Healthcare Roles Report found under Provider Reports Folder via the Reports tab.

Content
This report is *only* viewable by Healthcare Organization Admins and Healthcare Location Managers.

Section	Field	Definitions
Details	Account: Account Name	The Location Name
Details	First Name	The First Name of the user at this location
Details	Last Name	The Last Name of the user at this location
Details	Title	The Title of the user at this location
Details	Contact: NCID	Unique username login ID for North Carolina systems
Details	Email	The email address of the user
Details	Last Login	The date and time this HCP user last logged into the system

Audience

Healthcare Location Manager

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

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, Safari, or Edge (Chromium only) browsers 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 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	1/31/2021	• Initial document		Darrell Lee