North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Inventory Wastage, Return & Redistribution/Transfer User Guide

Version 4
January 17, 2021
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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Vaccine Wastage, Returns & Redistributions/Transfers
Process Overview
Overview

To share an accurate picture of the inventories at your disposal with the state through CVMS, you will need to update the CVMS Provider portal with COVID-19 Vaccine inventory reductions, or deprecations. These actions typically involve:

1. Documenting COVID-19 Vaccine Wastage,
2. Returning COVID-19 Vaccine to the manufacturer, and
3. Understanding the COVID-19 Vaccine redistribution or transfer processes

The processes discussed in this training guide are primarily for the **Healthcare Location Managers** profile.

**You will also need to:**

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari (Internet Explorer or Edge non-Chromium are not supported)

**Now, let’s get started!**
### Key Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Wastage</td>
<td>Wastage is the sum of COVID-19 vaccines discarded, lost, damaged or destroyed.</td>
</tr>
<tr>
<td>Return</td>
<td>Return is the sum of COVID-19 vaccines that have been sent back to the manufacturer.</td>
</tr>
<tr>
<td>Spoilage</td>
<td>Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.</td>
</tr>
<tr>
<td>Vaccine Deprecation</td>
<td>Vaccine Deprecation represents the process in which the amount of COVID-19 vaccines is reduced by the amount of COVID-19 vaccines administrated, wasted, or returned.</td>
</tr>
<tr>
<td>Vaccine Inventory Shipment Details</td>
<td>Vaccine Inventory Shipment Details may include manufacturer name, lot number, serial number, and National Drug Code (NDC).</td>
</tr>
<tr>
<td>Redistribution</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>Transfer</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>
</tbody>
</table>
When a COVID-19 Vaccine is to be redistributed/transfered to another provider location

Healthcare Location Manager completes a COVID-19 Vaccine Redistribution/Transfer Request Form, with details such as Primary Location, Secondary Location, lot number, and quantity to redistribute/transfer. Completed forms are submitted to the NC Immunization Branch through the CVMS Help Desk Portal: [https://ncgov.servicenowservices.com/csm_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

If approved, The NC Immunization Branch will initiate the redistribution/transfer in CVMS. The approved redistribution/transfer is reflected as an order for the Secondary Location.

The COVID-19 Vaccine On Hand inventory of the sending location is decreased. The receiving location has a COVID-19 Vaccine Inventory record auto-created, but the quantity is noted as "in transit".

Secondary Location completes "Inbound Redistribution/Transfer" process, and the quantity is changed from "in transit" to "available".

When a COVID-19 Vaccine is returned to manufacturer

Healthcare Location Manager accesses the Vaccine Return Survey Form, providing reason for return and other applicable information.

Once submitted, the Healthcare Provider Location’s Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.

When a COVID-19 Vaccine is wasted

Healthcare Location Manager accesses the Vaccine Wastage Survey Form, providing reason for waste and other applicable information.

Once submitted, the Healthcare Provider Location’s Total COVID-19 Vaccine On Hand Inventory is decreased accordingly.
Log a COVID-19 Vaccine Wastage
Step 1 of 5: Navigate to the Vaccine Inventory tab

To comply with the CDC's COVID-19 Vaccine inventory management guidelines, you will want to document **ALL CASES of COVID-19 VACCINE WASTAGE** in the CVMS Provider Portal. Accurately tracking COVID-19 Vaccine Wastage will also help you maintain an accurate view of COVID-19 Vaccine inventory levels for the location(s) that you support.

*Remember, examples of COVID-19 Vaccine Wastage include breaking vial/syringe and lost COVID-19 Vaccines.*

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 5: Open the Vaccine Wastage Survey form

At the top of the page, you will see the different actions you can take to manage your COVID-19 Vaccine inventory. The ALL VACCINES LIST VIEW will be displayed by default to help you review your COVID-19 Vaccine Inventory records.

1. Click WASTE at the top of the page
2. After clicking WASTE, you will be directed to the VACCINE WASTAGE SURVEY FORM

Tips
To see more details for a specific Vaccine Inventory record, click the Vaccine Inventory Hyperlink.
Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory records to report waste. At the bottom, you will see **ALL WASTAGE EVENTS** displaying all previously recorded COVID-19 Vaccine inventory waste.

1. Check the **BOX** for the **APPROPRIATE ROW(S)**
2. Click **NEXT** at the bottom of the page
3. After clicking **NEXT**, you will see the **VACCINE WASTAGE SURVEY FORM**

**Tips**
You will be able to report a Partial or Full Vaccine shipment wastage on the next page.
Step 4 of 5: Complete the Vaccine Wastage Survey form

1. Populate the required REPORT WASTE FIELDS:
   1. Date Wastage Occurred
   2. Doses Wasted
   3. If you want to report the entire Vaccine Inventory wasted, check the Entire Vaccine Inventory Wasted Checkbox.
   4. Reason for Waste

2. You may populate the OPTIONAL FIELDS if desired

3. Before submitting the form, CONFIRM that all entered details are correct

4. Once you are ready to submit the form, click NEXT

5. After clicking NEXT, you will be directed to the CONFIRMATION PAGE

Audience
Healthcare Location Manager
Step 5 of 5: Submit the Vaccine Wastage Survey form

The VACCINE WASTAGE RECORD is now submitted, and your COVID-19 Vaccine inventory will be automatically updated.

1. Click FINISH
2. After clicking FINISH, you will be directed back to the INITIAL VACCINE WASTAGE SURVEY FORM PAGE

Tips
After clicking FINISH, you will see your Vaccine Wastage record displayed on the All Wastage List View.
Return COVID-19 Vaccines to Manufacturer
Step 1 of 5: Navigate to the Vaccine Inventory tab

To maintain an accurate view of your location(s)'s COVID-19 Vaccine inventory levels, you will want to track inventory that is RETURNED TO THE MANUFACTURER. This system process is intended ONLY for the purpose of maintaining an accurate count of your COVID-19 Vaccine levels.

It is NOT meant to track shipping details, storage details, or any other information related to returning COVID-19 Vaccine inventory to the manufacturer.

*Remember, examples of COVID-19 Vaccine Returns / Spoilage include improper storage conditions and expired COVID-19 Vaccines.*

1. At the top of your home page, locate the tab VACCINE INVENTORY
2. Click VACCINE INVENTORY
Step 2 of 5: Open the Vaccine Return Survey form

At the top of the page, there are different actions you can take to manage COVID-19 Vaccine inventory. The **ALL VACCINES LIST VIEW** will be displayed by default to help you review your COVID-19 Vaccine inventory.

1. Click **RETURN**
2. After clicking **RETURN**, you will be directed to the **VACCINE RETURN SURVEY FORM**

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**Tips**
Sort the columns to help you find the Vaccine Inventory record.
Step 3 of 5: Select the Correct Vaccine Inventory Record

On this page, you will be directed to select **ONE OR MORE** Vaccine Inventory records to report a return. At the bottom, you will see **ALL RETURN EVENTS** displaying all previously recorded COVID-19 Vaccine Returns.

1. Check the **BOX** for the **APPROPRIATE ROW(S)**
2. Click **NEXT**
3. After clicking **NEXT**, you will see the **VACCINE RETURN SURVEY FORM**

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**Tips**

If you want to review a past COVID-19 Vaccine return record, scroll to the bottom of the page and click the Return ID Hyperlink.
Step 4 of 5: Complete the Vaccine Return Survey form

1. Populate all required **VACCINE RETURN FIELDS**
   1. Return Date
   2. Doses Returned
   3. If you want to report the entire Vaccine Inventory returned, check the Entire Vaccine Inventory Returned Checkbox.
   4. Reason for Return
2. You may populate **OPTIONAL FIELDS** if desired
3. Before submitting the form, **CONFIRM** that all entered details are correct
4. Once all details are confirmed, click **NEXT**
5. After clicking **NEXT**, you will be directed to the **CONFIRMATION PAGE**
Step 5 of 5: Submit the Vaccine Return Survey form

The VACCINE RETURN RECORD is now submitted, and your Vaccine Inventory will be automatically updated.

1. Click FINISH
2. After clicking FINISH, you will be directed back to the INITIAL VACCINE RETURN SURVEY FORM PAGE

Audience

Healthcare Location Manager

Tips
After clicking FINISH, you will see your Vaccine return record displayed on the All Returns List View.
Transfer or Redistribute COVID-19 Vaccines (sender)
Step 1 of 9: Initiate an Outbound Redistribution/Transfer in the CVMS Help Desk Portal

Redistribution and transfer requests require **NC DHHS IMMUNIZATION BRANCH APPROVAL** to ensure proper storage capabilities and tracking of COVID-19 Vaccine Inventory movements

To initiate an **OUTBOUND REDISTRIBUTION/TRANSFER** to another location, you will have to submit a request

1. Navigate to the CVMS Help Desk Portal at [https://ncgov.servicenowervices.com/csm_vaccine](https://ncgov.servicenowervices.com/csm_vaccine)

2. Click on Login and enter your CVMS Help Desk Portal Username and Password (please reference slide 2 if you have registration or login questions)
1. From the Home page, click the VACCINE REDISTRIBUTION/TRANSFER
Step 3 of 9: Complete the Request Form

To fill the request for approval:

1. Enter your name and the reason for request
2. Enter the sending location details
3. Enter the location vaccine for children (VFC) PROVIDER INFORMATION NUMBER
4. Enter the receiving location details
5. Click on ADD and enter the details surrounding the vaccine inventory(s) being redistributed/transferred – Inventory details can also be found by navigating into the VACCINE INVENTORY tab of the CVMS Provider Portal
6. CHECK the box to indicate you agree to the listed requirements
7. Attach any relevant documentation
8. SUBMIT request to be routed for approval

Tips
VFC PIN (i.e., NCA650001) can also be found in the CVMS Provider Enrollment Portal (Location) within the “For Official Use Only” section. It can also 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#).
Step 4 of 9: Receive an email of confirmation

1. After submitting the file, you will receive a confirmation email with the case number
2. If you click on the link, you will be re-directed to a summary view of the case

Your case has been created, click here to view the case: Link

Click here to view the Pfizer Recommendation Document

Click here to view the Moderna Recommendation Document

Someone will assist you soon.
Step 5 of 9: Providing Redistribution/Transfer Details

Once your **NC COVID-19 VACCINE REDISTRIBUTION/TRANSFER REQUEST** is approved, you will be able to **SHIP YOUR VACCINE INVENTORY** to the receiving location.

The Immunization Branch team will create the **TRANSFER ORDER** record in CVMS. You can **UPDATE** it with the **ACTUAL SHIPMENT DETAILS** to support tracking of the shipment. The order transfer record can be located via the Vaccine Inventory record that is providing the inventory.

1. From the home page, click **VACCINE INVENTORY**
2. Search for the **VACCINE INVENTORY NAME**
3. Click the **VACCINE INVENTORY NAME**

![Image of Vaccine Inventory Page]

**Audience**

Healthcare Location Manager
Step 6 of 9: Open the Vaccine Inventory Record

Once you are on the VACCINE INVENTORY RECORD, navigate to the RELATED TAB.

1. Navigate to the RELATED TAB
Step 7 of 9: Open the Order Transfer Record

You will be able to locate the ORDER TRANSFER RECORD that was created to track the redistribution/transfer. Before you edit the order transfer record, CONFIRM THAT THE RECORD TYPE IS TRANSFER.

1. Locate the ORDERS SECTION
2. Click the ORDER NUMBER for the ORDER TRANSFER

Tips
Review the Vaccine Receiver to confirm it is the correct record.

Record Type of Transfer in CVMS is used for both Redistributions and Transfers.
Step 8 of 9: Edit the Order Transfer Record

Once you have the ORDER TRANSFER RECORD open, you can provide the SHIPMENT DETAILS REQUIRED.

1. Navigate to the DETAILS SECTION
2. Click the PENCIL ICON next to SENDING LOCATION DATE AND TIME

Tips
Navigate to the details section to edit the order transfer record.

Audience
Healthcare Location Manager
Step 9 of 9: Enter Shipment Details and Save

Once you click edit, you will be able to update the record and save your changes.

1. Enter the **SENDING LOCATION DATE AND TIME** when shipment was sent

2. Enter the **SHIPMENT TRACKING INFORMATION** in the **SENDING LOCATION COMMENTS** field

3. Click **SAVE**
Transfer or Redistribute COVID-19 Vaccines (receiver)
Step 1 of 4: Processing an Inbound Redistribution/Transfer

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

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

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

Tips
Inbound redistributions/transfers are not processed from the Add Inventory Process.
Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** records that are incoming redistributions/transfers 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 Vaccine Inventory record, you will see the Vaccine Inventory 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 redistribution/transfer is now processed.

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

Tips
Enter date received and doses received for the Vaccine Inventory.

Audience
Healthcare Location Manager
Step 4 of 4: Complete the Inbound Transfer form

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

1. Click **FINISH**

**Tips**
Complete the inbound transfer form by clicking Finish.
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 or Safari to use this tool.
• [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) will not be supported beginning January 2021.
# 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

<table>
<thead>
<tr>
<th>Version</th>
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<tbody>
<tr>
<td>1</td>
<td>12/21/2020</td>
<td>• Initial document</td>
<td></td>
<td>Azalea Troche</td>
</tr>
<tr>
<td>2</td>
<td>1/10/2021</td>
<td>• Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Hep Desk Portal information</td>
<td>1, 2, 7, 11, 15, 21, 34</td>
<td>Courtney Seward</td>
</tr>
<tr>
<td>3</td>
<td>1/13/2021</td>
<td>• Added a new screenshot of the new redistribution/transfer form and took out the TIP in slide 21.</td>
<td>1, 21, 22</td>
<td>Courtney Seward</td>
</tr>
<tr>
<td>4</td>
<td>1/17/2021</td>
<td>• Updated navigation bar</td>
<td>6</td>
<td>Azalea Troche &amp; Courtney Seward</td>
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