

CVMS Provider Portal Recipient Bulk Upload User Guide

Version 1.0

December 10, 2020



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**



NC DHHS COVID-19 Response



If you have any questions, please submit all inquiries to:

CVMS-Help@dhhs.nc.gov

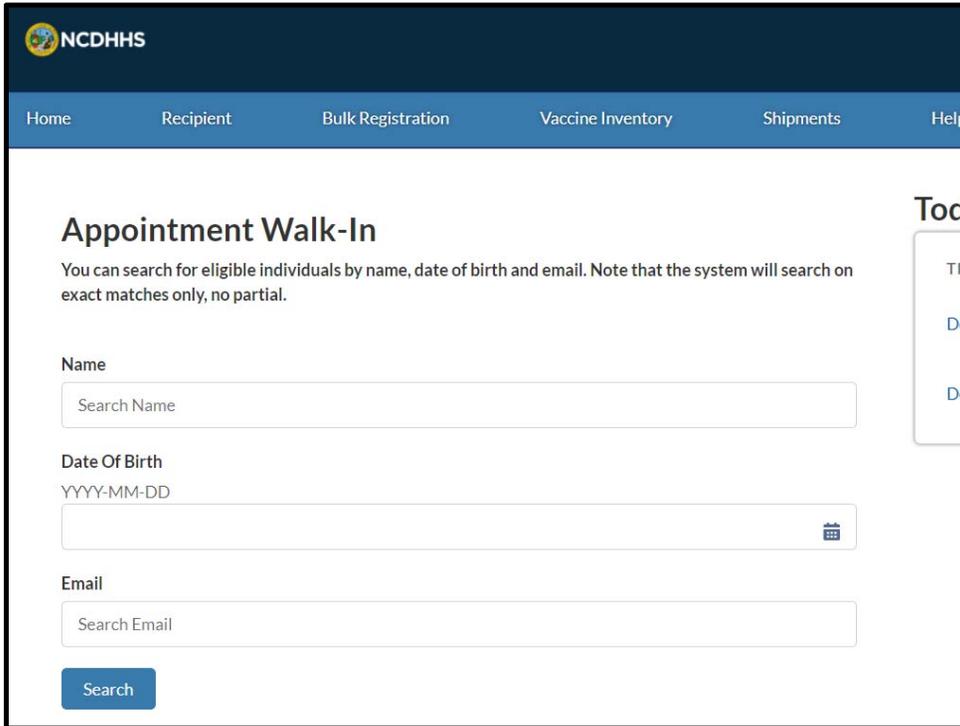
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Recipient Bulk Upload

Process Overview

Overview



The screenshot shows the NCDHHS website interface. At the top, there is a dark blue header with the NCDHHS logo and navigation links: Home, Recipient, Bulk Registration, Vaccine Inventory, Shipments, and Help. Below the header, the main content area is titled "Appointment Walk-In". A sub-header reads: "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." There are three search input fields: "Name" with a placeholder "Search Name", "Date Of Birth" with a placeholder "YYYY-MM-DD" and a calendar icon, and "Email" with a placeholder "Search Email". A blue "Search" button is located at the bottom left of the search area.

As an employer, you will need to upload your Phase 1 eligible employees' information into the CVMS Provider Portal for them to register to the CVMS Recipient Portal. When completing a Recipient Bulk Upload, you will typically focus on 4 core areas:

1. Completing the Recipient Bulk Upload Template
2. Uploading the Recipient Bulk Upload file to the CVMS Provider Portal
3. Correcting File Errors & Re-uploading
4. Viewing uploaded Recipient records

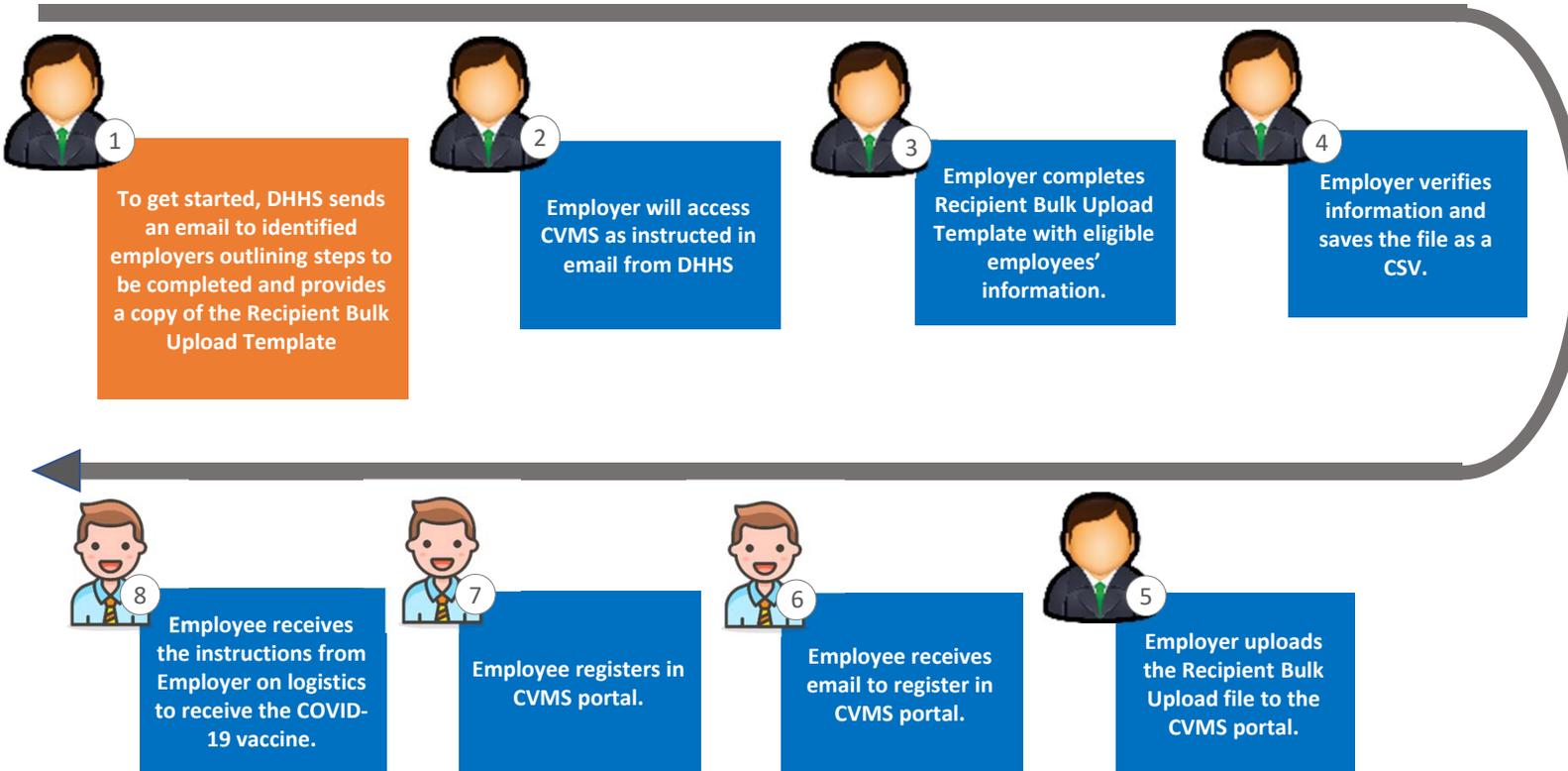
The Recipient Bulk Upload Process is typically carried out by the **Healthcare Location Manager** profile.

And lastly, you will need to:

- Use the latest version of Chrome, Firefox, or Safari, and
- Log into the CVMS Provider Portal

Now, let's get started!

Recipient Bulk Registration Process Overview



Time Estimate

- ▶ Process takes 30 minutes to complete (depending on number of employees)

Key Objectives

- ▶ How employers can bulk upload employees or individual recipients into CVMS Provider Portal

Terminology



CSV File

A type of file saved through Microsoft Excel. To save as CSV file, select “Save As” → under File Type select “.csv (comma-delimited)”.



Employer

Hospital, medical facility, retail pharmacy that will be dispensing the vaccine, nursing home, etc.



Type

During the Recipient Bulk Upload Process, the Type Value for every employee or individual must be entered in the Recipient Bulk Upload Template. Risk values include: EMPLOYEE or INDIVIDUAL. Indicate EMPLOYEE for people who are working for the employer. Indicate INDIVIDUAL for people who are residents of the employer (e.g., residents of a nursing home, prison, or other long term care facility).



Risk

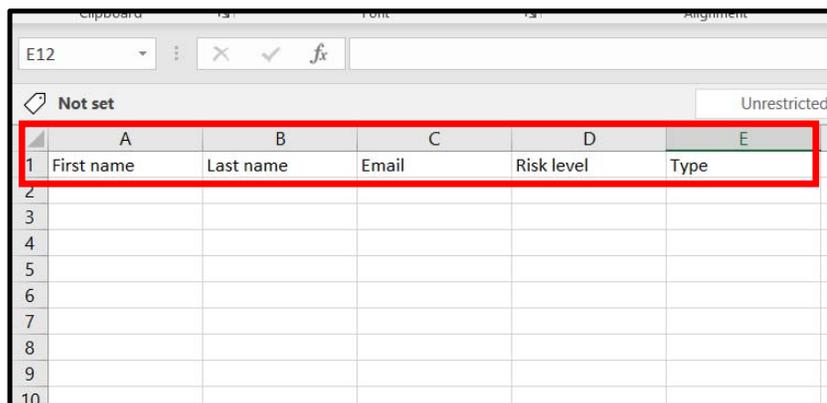
During the Recipient Bulk Upload Process, the Risk Value for every employee or individual must be entered in the Recipient Bulk Upload Template. Risk values include: HIGH or LOW. Indicate HIGH if the employee is responsible for caring / cleaning in areas with COVID-19 patients, performing tasks with high risks of aerosolization (Intubation, bronchoscopy, suctioning, invasive dental procedures, invasive specimen collection, CPR), responsible for handling decedents with COVID-19, or planning to administer the COVID-19 vaccine.

Complete the Recipient Bulk Upload File

What information is needed to complete the Recipient Bulk Upload process?

Step 1 of 4: Add Employee or Individual Recipient Data to Recipient Bulk Upload File

To begin the Recipient Bulk Upload process, you will need to collect information on your employees. The information collected must be **VALID** as it will be **CONSIDERED LEGAL MEDICAL INFORMATION**. Ensure that legal names and real email addresses are captured.



	A	B	C	D	E
1	First name	Last name	Email	Risk level	Type
2					
3					
4					
5					
6					
7					
8					
9					
10					

NOTE: You will only be able to load 100 employee/recipient records at a time. For more information about this, please review the next section.

1. Confirm you have the **RECIPIENT BULK UPLOAD TEMPLATE**
2. Enter the following information in the template:
 - Employee/Recipient First Name
 - Employee/Recipient Last Name
 - Employee/Recipient Email Address
 - Type
 - Risk
3. For the **TYPE FIELD**, you will enter either:
 - Employee
 - Individual
4. Lastly, for the **RISK FIELD**, you will enter either:
 - Low
 - High

Task

Enter employee or individual recipient data to upload file

Tips

If you do not have the Recipient Bulk Upload File, you can find the template online, [Click Here](#). You can also email CVMS-help@dhhs.nc.gov with the name of the file in the subject line

Audience

Healthcare
Location Manager

Step 2 of 4: How to Determine the Risk Value of an Employee or Individual Recipient

The following questions will help you evaluate the **RISK LEVEL** for each of your employees.

1. Are they responsible for caring / cleaning in areas with COVID-19 patients?
2. Are they responsible for performing tasks with high risks of aerosolization (e.g., intubation, bronchoscopy, suctioning, invasive dental procedures, invasive specimen collection, CPR)?
3. Are they responsible for handling decedents with COVID-19?
4. Are they planning to administer the COVID-19 vaccine?

Not set					
	A	B	C	D	E
1	First name	Last name	Email	Risk level	Type
2	Azalea	Johnson	azaleatest@mailinator.com	High	Employee
3	Omri	Noel	omrinoel@mailinator.com	High	Employee
4	Quaint	Jitsu	quaintmma@mailinator.com	High	Employee
5	John	Neil	johnneil@mailinator.com	High	Employee
6	Liz	Doc	liz@mailinator.com	High	Employee
7	Josh	Hatch	joshhastch@mailinator.com	High	Employee
8	Matthew	Troche	matttroche@mailinator.com	High	Employee
9					

Tasks

Determine the risk value of each employee or individual recipient

Tips

Consider the four questions listed on the left to validate the risk value of each employee or individual recipient

Audience

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Location Manager

*If you answered **YES** to any of the questions above, the **RISK** value should be entered as **HIGH**.*

Step 3 of 4: How to Determine the Type Value of an Employee or Individual Recipient

You will need to validate the **TYPE VALUE** for each of the individuals you are uploading.

How to validate the TYPE VALUE of an Employee/Recipient:

1. Understand if the person you are uploading is *either* an EMPLOYEE – *or* – an INDIVIDUAL.
2. **MARK** the person as **EMPLOYEE** if they are currently **EMPLOYED** by you.
3. **MARK** the person as **INDIVIDUAL** if they are currently **RESIDING** in **YOUR ESTABLISHMENT**

** In most scenarios, you will likely select **EMPLOYEE**.*

Not set					
	A	B	C	D	E
1	First name	Last name	Email	Risk level	Type
2	Azalea	Johnson	azaleatest@mailinator.com	High	Employee
3	Omri	Noel	omrinoel@mailinator.com	High	Employee
4	Quaint	Jitsu	quaintmma@mailinator.com	High	Employee
5	John	Neil	johnneil@mailinator.com	High	Employee
6	Liz	Doc	liz@mailinator.com	High	Employee
7	Josh	Hatch	joshhastch@mailinator.com	High	Employee
8	Matthew	Troche	matttroche@mailinator.com	High	Employee
9					

Tasks

Determine the type value of each employee or individual

Tips

See slide 7 for additional explanation

Audience

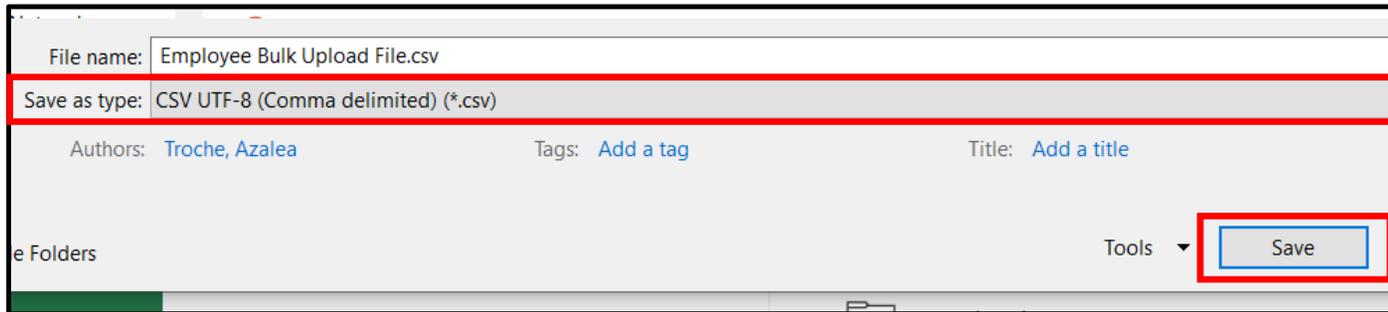
Healthcare
Location Manager

Step 4 of 4: Verify & Save Data to Upload File

You are now ready to **REVIEW ALL REQUIRED EMPLOYEE/RECIPIENT DATA** that you have entered and **SAVE THE FILE AS A .CSV FILE**.

How do I save an excel sheet as a .csv file?

1. Click the **FILE** button
2. Click **SAVE AS**
3. **ENTER A FILE NAME** (no file name requirements)
4. For file type, select **CSV (comma-delimited) (*.csv)**
5. Click **SAVE**



Tasks

Save employee or individual recipient data as a .CSV file

Tips

CSV file is a type of excel file

Audience

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Upload Recipient Bulk Upload file

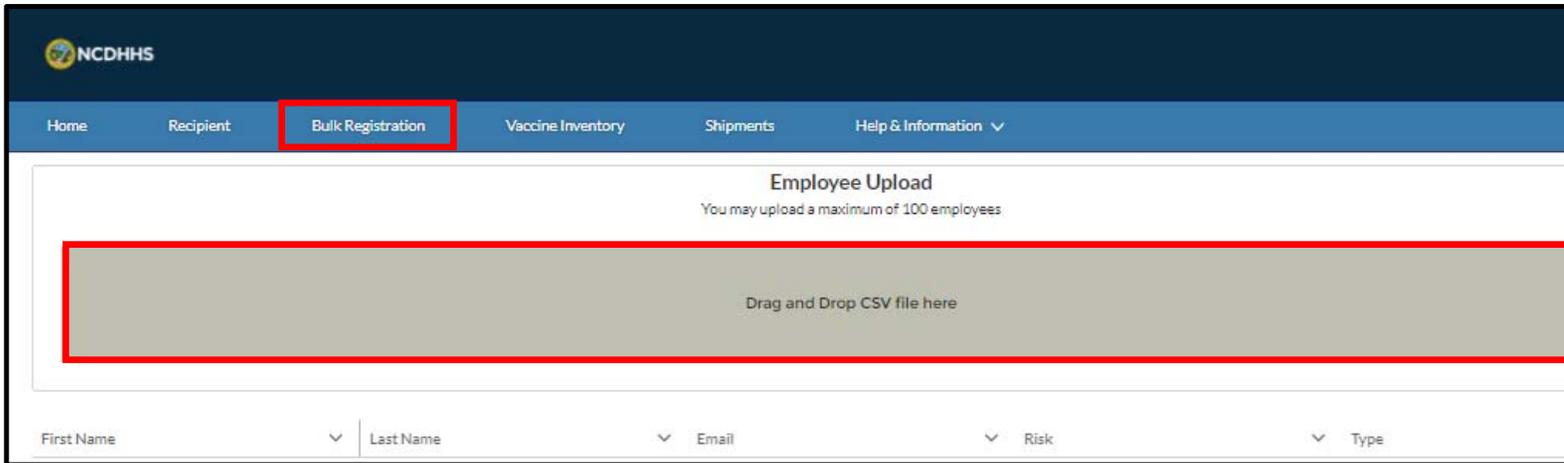
How do you upload your Recipient Bulk Upload file to the CVMS Provider Portal?

Step 1 of 3: Upload Recipient Bulk Upload file into CVMS Provider Portal

When your template is fully populated, you can **BEGIN THE UPLOAD PROCESS:**

1. Log into the **CVMS PROVIDER PORTAL**
2. At the top of your homepage, navigate to the **BULK REGISTRATION TAB**
3. Drag and drop the .csv file from your personal Desktop to **DRAG AND DROP CSV FILE HERE**

Remember, you cannot upload a file with more than 100 recipient records. Please see slide 17 for instructions on how to receive assistance if you need to upload more than 100 recipient records.



The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes 'Home', 'Recipient', 'Bulk Registration' (highlighted with a red box), 'Vaccine Inventory', 'Shipments', and 'Help & Information'. Below the navigation bar, the 'Employee Upload' section is visible, with the text 'You may upload a maximum of 100 employees'. A large grey rectangular area is outlined in red, containing the text 'Drag and Drop CSV file here'. At the bottom of the page, there are dropdown menus for 'First Name', 'Last Name', 'Email', 'Risk', and 'Type'.

Tasks

Drag or Drop Recipient upload file

Tips

Recipient upload file should have been saved as a CSV file

Audience

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Step 2 of 3: Save Upload Into the CVMS Provider Portal

The contents from the file upload will appear on the screen:

1. **REVIEW** the uploaded data
2. If you find errors or missing information, click **CANCEL**
 - *Clicking **CANCEL** removes the file*
3. If the data looks correct, click the **CREATE RECORDS** button

FIRST NAME	LAST NAME	EMAIL	RISK LEVEL	TYPE
Azalea	Michael	azaleatest@mailinator.com	High	Employee
Omri	Noel	omrinoel@mailinator.com	High	Employee
Quaint	Smith	quaintma@mailinator.com	Low	Employee
John	Neil	johnneil@mailinator.com	High	Employee
Liz	Doc	lizdoctest@example.com	High	Employee
Josh	Hatch	joshhastch@mailinator.com	Low	Employee
Matthew	Troche	matttroche@mailinator.com	High	Employee

Tasks

Save upload file to the CVMS Provider Portal

Tips

Before you click CREATE RECORDS, you will be able to review any ERRORS in the loaded rows of employee or individual recipient data

Audience

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Location Manager

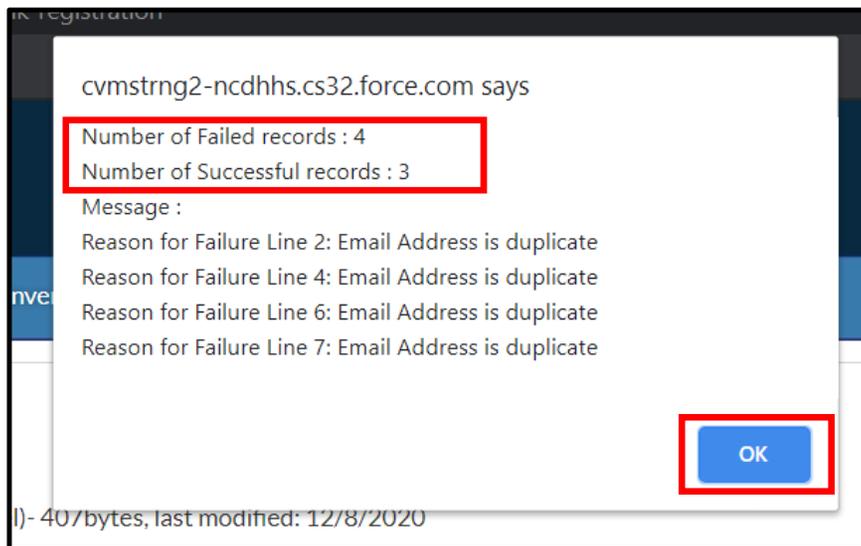
Step 3 of 3: Review Uploaded Recipients in CVMS Provider Portal

Once the upload is complete, you will receive an **ALERT MESSAGE**. The message will state the number of **SUCCESSFUL** employee/recipient uploads and number of **FAILED** recipient uploads.

Once you click **OK**, the successful uploads will **RECEIVE AN AUTOMATIC EMAIL NOTIFICATION** allowing them to **REGISTER** to the **CVMS RECIPIENT PORTAL**.

You will also receive an **AUTOMATIC EMAIL** with the **FAILED LOADS** and the **REASON FOR FAILURE**. You will receive an extract of records that need correction. No email will be sent to failed records.

*In the next section, we will cover how to manage **FAILED RECIPIENT UPLOADS**.*



Tasks

View uploaded employees or individual recipients in the CVMS Provider Portal

Tips

You can view all uploaded employees or individual recipients in the CVMS Provider Portal

Audience

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Uploading Recipient Bulk Upload Files with More than 100 Rows

Remember, the Bulk Registration Process can only upload bulk files with a **MAXIMUM OF 100 RECIPIENT RECORDS**.

If you need to **UPLOAD** a file with **MORE THAN 100 RECORDS**, please **SEND YOUR .CSV FILE TO COVIDHELP@DHHS.NC.GOV**. You will be assisted in this process.

Before you send your file, confirm the following:

1. The file uses the correct template
2. All recipient records are complete & accurate
3. The file is saved as a .CSV file

Tasks

Send CSV file to helpdesk for assistance in uploading employee or individual recipient bulk files

Tips

Confirm the file type is .CSV file

Audience

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View and Re-Upload File Errors

How do you view, edit and re-upload errors?

Step 1 of 5: View Upload File Errors in CVMS Provider Portal

Once the upload is complete, you will receive an **ALERT MESSAGE**. The alert message will state the **NUMBER OF SUCCESSFUL RECIPIENT** uploads and **NUMBER OF FAILED RECIPIENT UPLOADS**.



This alert message will display:

- **SUCCESSFULLY LOADED** employees or individual recipients
- **RECIPIENTS WHO FAILED TO LOAD** into the CVMS Provider Portal
- The **REASON FOR FAILURE** will be provided

Tasks

View the number of successful and failed employee or individual recipient uploads

Tips

Note the information in the alert message for failed employee or individual recipient uploads

Audience

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Step 2 of 5: Receive Email with Upload File Errors

If any employees or individual recipients included in your upload failed, you should **AUTOMATICALLY RECEIVE AN EMAIL** from the CVMS system after clicking **OK** on the **ALERT MESSAGE**.

The attachment included in the email will **CONTAIN THE FAILED RECORDS** in the same recipient bulk upload format. It will also include an additional column with the **REASON FOR FAILURE**.

1. **OPEN THE EMAIL**
2. The email subject line should read: **BULK UPLOAD FAILURE RECORDS**
3. **OPEN THE EXCEL** attachment in the email

Not set							Unrestricted	Confidential	Highly Confidential
	A	B	C	D	E	F	G		
1	FirstName	LastName	PersonEmail	Risk Level	Type	Error			
2		TestLoadE2ERecip2	Nicholas.NoEmail@company.email2.com	High	Employee	Line 2: First Name is blank			
3	Nicholas		Nicholas.NoEmail@company.email3.com	High	Employee	Line 3: Last Name is blank			
4	Nicholas	TestLoadE2ERecip4		High	Employee	Line 4: Email Address is blank			
5	Nicholas	TestLoadE2ERecip5	bademail	High	Employee	Line 5: Email Address is invalid			
6	Nicholas	TestLoadE2ERecip6	Nicholas.NoEmail@company.email6.com		Employee	Line 6: Risk Level is invalid			
7	Nicholas	TestLoadE2ERecip7	Nicholas.NoEmail@company.email7.com	High		Line 7: Individual Type is invalid			
8	Nicholas	TestLoadE2ERecip8	Nicholas.NoEmail@company.email8.com	Middle	Employee	Line 8: Risk Level is invalid			
9	Nicholas	TestLoadE2ERecip9	Nicholas.NoEmail@company.email9.com	High	Someone	Line 9: Individual Type is invalid			
10									

Tasks

Check email notification from CVMS system regarding failed records

Tips

Open the excel attachment in the email for detailed information

Audience

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Location Manager

Step 3 of 5: Fix File Errors

Inside the attachment is a list of all employees or individual recipients who failed to load into the system.
No successfully loaded recipients will be included in this list.

1. In the excel file attached, find the column **ERROR**
2. Use the **ERROR** field to identify the issue and **CORRECT THE DATA IN THE SAME SHEET**

Not set						Unrestricted	Confidential	Highly Confidential
	A	B	C	D	E	F		
1	FirstName	LastName	PersonEmail	Risk Level	Type	Error		
2		TestLoadE2ERecip2	Nicholas.NoEmail@company.email2.com	High	Employee	Line 2: First Name is blank		
3	Nicholas		Nicholas.NoEmail@company.email3.com	High	Employee	Line 3: Last Name is blank		
4	Nicholas	TestLoadE2ERecip4		High	Employee	Line 4: Email Address is blank		
5	Nicholas	TestLoadE2ERecip5	bademail	High	Employee	Line 5: Email Address is invalid		
6	Nicholas	TestLoadE2ERecip6	Nicholas.NoEmail@company.email6.com		Employee	Line 6: Risk Level is invalid		
7	Nicholas	TestLoadE2ERecip7	Nicholas.NoEmail@company.email7.com	High		Line 7: Individual Type is invalid		
8	Nicholas	TestLoadE2ERecip8	Nicholas.NoEmail@company.email8.com	Middle	Employee	Line 8: Risk Level is invalid		
9	Nicholas	TestLoadE2ERecip9	Nicholas.NoEmail@company.email9.com	High	Someone	Line 9: Individual Type is invalid		
10								

Tasks

Correct recipient data

Tips

Refer to the column Error in the excel to correct recipient data

Audience

Healthcare
Location Manager

Step 4 of 5: Fix File Errors – Potential Reasons for Failure

There are a few reasons why an recipient record may fail – from blank fields to invalid data formats.

Potential Error Messages:

1. EMAIL IS NOT UNIQUE:

- Meaning: The email was already found in the system. Was this recipient already loaded?
- Search for a pre-existing recipient record in the CVMS Provider Portal to validate

2. FIRST & LAST NAME CANNOT BE EMPTY:

- Meaning: A name value was not entered

3. EMAIL CANNOT BE BLANK:

- Meaning: A email value was not entered

4. INVALID EMAIL ADDRESS:

- Meaning: An invalid email address was submitted

Tasks

Recognize and understand common error messages

Tips

Refer to this slide when correcting file errors

Audience

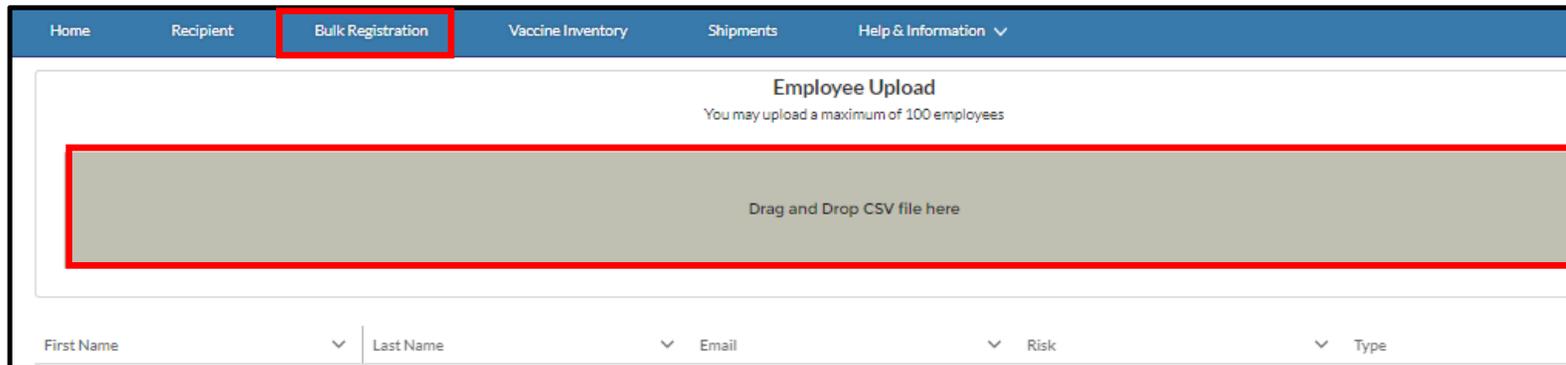
Healthcare
Location Manager

Step 5 of 5: Save and Re-Upload File Errors

Once you reviewed and corrected any recipient data errors, you are ready to **RE-UPLOAD THE UPDATED FILE**.

1. On the same sheet where you made your updates, **DELETE** the **ERROR COLUMN**
2. **SAVE** the file as a **.CSV**
3. Navigate to the **BULK REGISTRATION** tab
4. **DRAG AND DROP** the **CORRECTED FILE** to the drag and drop area
5. Click **CREATE RECORDS** once you validate that all the errors have been updated
6. Click **OK** on the **ALERT MESSAGE** window

The next section will guide you through reviewing your successfully loaded recipients.



The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Recipient', 'Bulk Registration' (highlighted with a red box), 'Vaccine Inventory', 'Shipments', and 'Help & Information'. Below the navigation bar is a section titled 'Employee Upload' with the subtext 'You may upload a maximum of 100 employees'. A large grey rectangular area is outlined with a red border, containing the text 'Drag and Drop CSV file here'. At the bottom of the interface, there are several dropdown menus labeled 'First Name', 'Last Name', 'Email', 'Risk', and 'Type'.

Tasks

Reupload corrected recipient data file

Tips

Remember, the only columns that should be listed in your file are First Name, Last Name, Email, Risk Level and Type

Audience

Healthcare
Location Manager

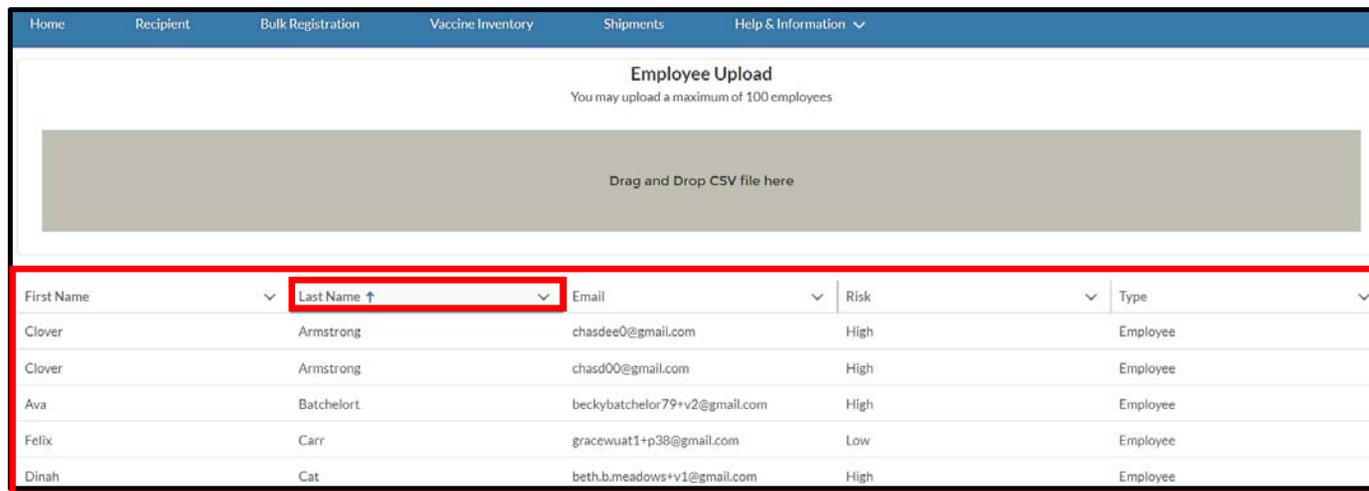
View Uploaded Recipient Records

How do you review your successfully loaded records?

View Uploaded Recipient Records

You will be able to **REVIEW YOUR LOADED RECIPIENTS** who are in the CVMS Provider Portal via the **BULK REGISTRATION TAB**. You will see your loaded recipients in the table below the drag and drop section.

1. From your home page, navigate to the tab **BULK REGISTRATION**
2. Locate the table of **LOADED RECIPIENTS**
3. You can **SORT** by clicking the **COLUMN NAME**
4. A small **ARROW** will appear next to the column name when you sort



Employee Upload
You may upload a maximum of 100 employees

Drag and Drop CSV file here

First Name	Last Name ↑	Email	Risk	Type
Clover	Armstrong	chasdee0@gmail.com	High	Employee
Clover	Armstrong	chasd00@gmail.com	High	Employee
Ava	Batchelor	beckybatchelor79+v2@gmail.com	High	Employee
Felix	Carr	graceuat1+p38@gmail.com	Low	Employee
Dinah	Cat	beth.b.meadows+v1@gmail.com	High	Employee

Tasks

Review recipients who are in the CVMS Provider Portal

Tips

Navigate to the tab Bulk Registration and use sort function if needed

Audience

Healthcare
Location Manager

How to Remove Loaded Recipients

Remember, all successfully loaded recipients will automatically receive an email allowing access to register to the CVMS Recipient Portal.

You **CANNOT EDIT OR DELETE YOUR LOADED RECIPIENTS**. If you need to remove an uploaded recipient, please email the **CVSM HELP DESK** at CVMS-Help@dhhs.nc.gov.

Tasks

Review how to remove a loaded employee or individual recipient

Tips

Contact the CVMS Help Desk to remove a loaded employee or individual recipient

Audience

Healthcare
Location Manager

CVMS Recipient Portal Notification & COVID-19 Vaccine Questionnaire

How will recipients register for the CVMS Recipient
Portal?

CVMS Recipient Portal Email Notification

From: Vaccine Management System <nccvms@dhhs.nc.gov>

Date: Tue, Dec 8, 2020 at 1:55 AM

Subject: Thank you for Signing up!

To: carey.jones@email.com



Dear Carey Jones,

Thank you for signing up for our COVID-19 vaccination program. Your registration is not yet complete. To continue your enrollment process, please [click here](#) to reset your password. Once you have reset your password, please complete the health questionnaire.

Username: carey.jones@email.com.covid19vaccine

Thank you,
NC Department of Health and Human Services
Division of Public Health
Immunization Branch

Once successfully loaded into the CVMS Provider Portal, an **AUTOMATIC EMAIL NOTIFICATION** will be sent to each recipient.

The email will come from:
Vaccine Management System
nccvms@dhhs.nc.gov

Email Subject: Thank you for Signing Up!

The email will allow recipients to **REGISTER TO THE CVMS RECIPIENT PORTAL.**

Please inform your employees that they **MUST REGISTER TO THE CVMS PORTAL IF THEY WANT TO RECEIVE THE COVID-19 VACCINE.**

Tasks

Review the CVMS Recipient Portal Email Notification

Tips

Inform your employees that they must register to the CVMS Recipient Portal to receive the COVID-19 vaccine

Audience

Employee

CVMS Recipient Portal Password Reset & Username

From: Vaccine Management System <nccvms@dhhs.nc.gov>

Date: Tue, Dec 8, 2020 at 1:55 AM

Subject: Thank you for Signing up!

To: carey.jones@email.com



Dear Carey Jones,

Thank you for signing up for our COVID-19 vaccination program. Your registration is not yet complete. To continue your enrollment process, please [click here](#) to reset your password. Once you have reset your password, please complete the health questionnaire.

Username: carey.jones@email.com.covid19vaccine

Thank you,
NC Department of Health and Human Services
Division of Public Health
Immunization Branch

The email notification will prompt recipients to **RESET THEIR PASSWORD** and will provide their **CVMS RECIPIENT PORTAL USERNAME**.

The CVMS Recipient Portal Username has **COVID19VACCINE** added to the end of their email address they provided. They must use the correct username to be able to sign into the CVMS Recipient Portal.

After registering, recipients will be able to **COMPLETE THE HEALTH QUESTIONNAIRE** and will automatically receive their **COVID-19 VACCINE ELIGIBILITY**.

Tasks

Click the link in the email invitation to the Recipient Portal

Tips

Remember your username to register for the Recipient Portal

Audience

Employee

CVMS Recipient Portal Health Questionnaire

Once they log into the **CVMS RECIPIENT PORTAL**, they will be able to **COMPLETE THE HEALTH QUESTIONNAIRE**. The Health Questionnaire asks for **DEMOGRAPHIC DETAILS** as well as a few **MEDICAL DETAILS**. Recipients will receive their **COVID-19 VACCINE ELIGIBILITY** after submitting the Health Questionnaire.

For the initial release of the CVMS Recipient Portal, a recipient's COVID-19 VACCINE ELIGIBILITY is determined on whether they indicate they tested positive for COVID in the past 30 days.

Home Vaccine Registration My Dashboard Profile Help & Information

Introduction Contact and Demographic Detail **Medical Details** Confirmation

Please provide your medical background

* Have you tested positive for COVID in the past 30 days?
 Yes
 No

* How Many High Risk Chronic Conditions do you have? Review the CDC website for definitions of the conditions that cause higher risk of contracting COVID-19:
 None
 1
 2 or more

**Review the CDC website for definitions of the conditions that cause higher risk of contracting COVID-19:
<https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/people-with-medical-conditions.html>

Previous Next

Tasks

Review the CVMS Recipient Portal Health Questionnaire

Tips

Inform your employees to complete their Health Questionnaire in the CVMS Recipient Portal

Audience

Employee

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 CVMS-help@dhhs.nc.gov.

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
- Note, Internet Explorer and Edge (Non-Chromium) will not be supported beginning January 2021.