Castlight

COVID Locating Health Provider Portal

Training for Provider Reporting

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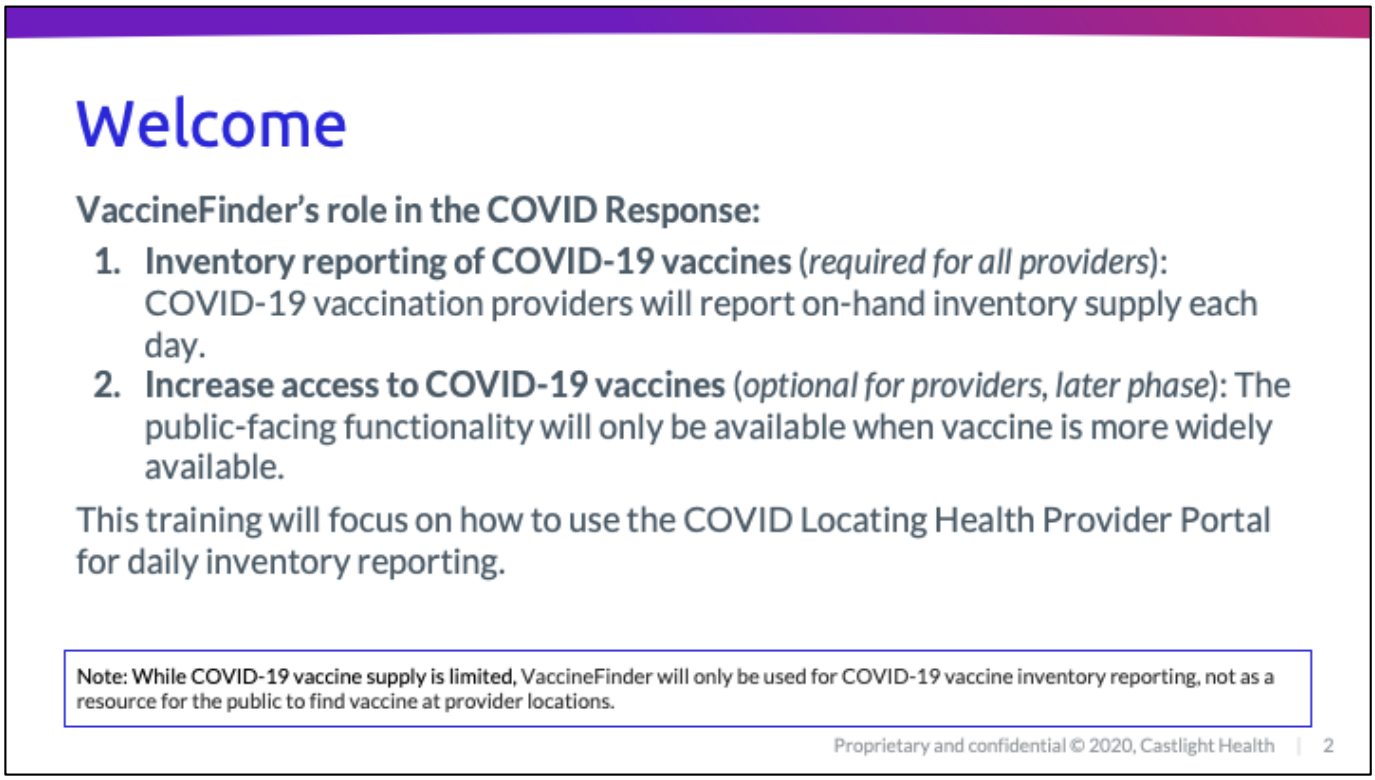


[1. Introduction]

Welcome to a training for the COVID Locating Health Provider Portal for providers reporting COVID-19 vaccine inventory. In this training we will explain how to set up your account and report inventory through the portal using a flat file upload and via online web form. We will also walk through how to add and remove vaccines from your inventory list.

A few important things to note before we get started.

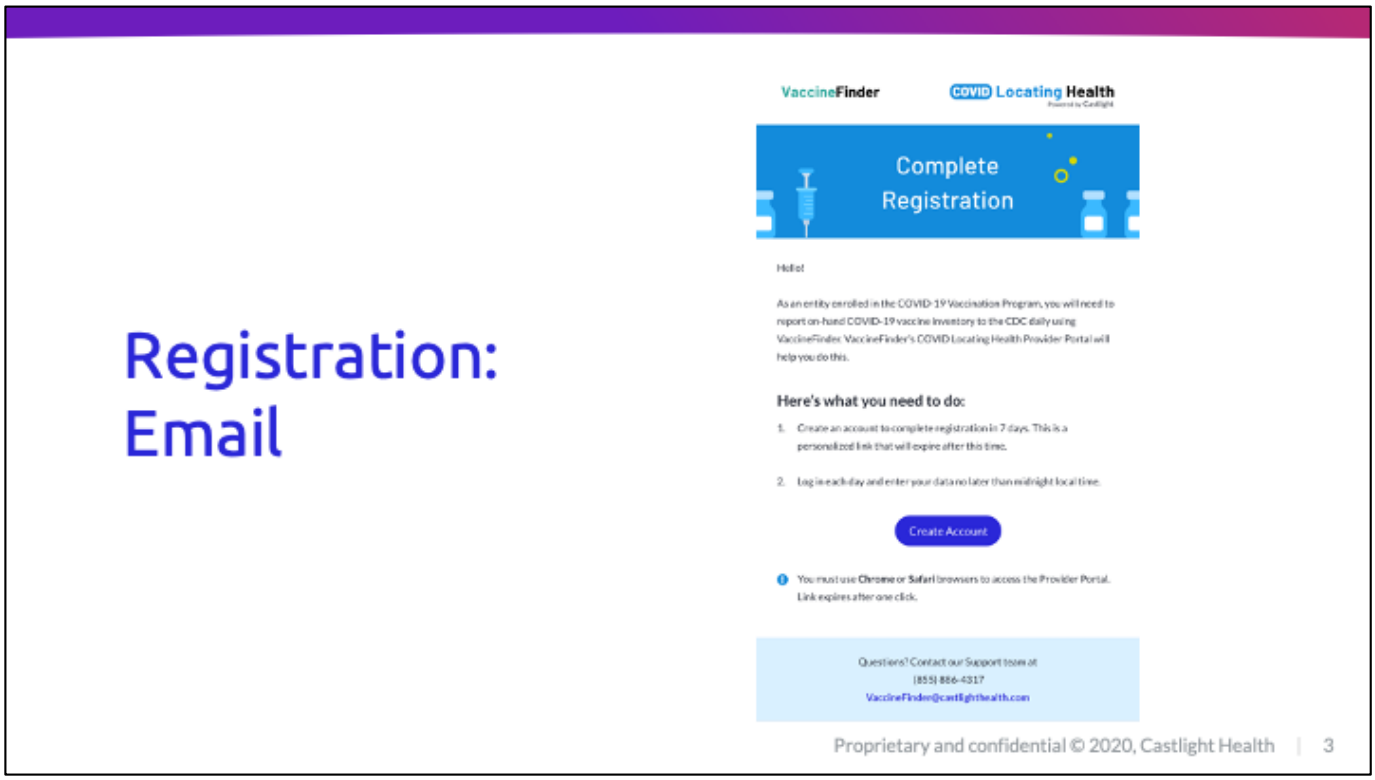
1. Please use Google Chrome, Safari, or Edge web browser to view the COVID Locating Health website
2. Please note that after 1 hour of inactivity you will need to fresh the page and log in again to update through the portal

Two steps must complete prior to a provider being eligible to register on VaccineFinder. These steps are:

1. Providers must be in their Jurisdictions Provider Enrollment file.
2. Providers must be registered in VTrckS as a COVID-19 vaccination provider with the Special Project Provider flag set to 2 for COVID-19 in the ExIS file.

At this time, provider onboarding to VaccineFinder is conducted in phases, starting with providers that jurisdictions have prioritized to receive initial vaccine shipments. Please contact your Jurisdiction's Immunization Program if you have any questions.

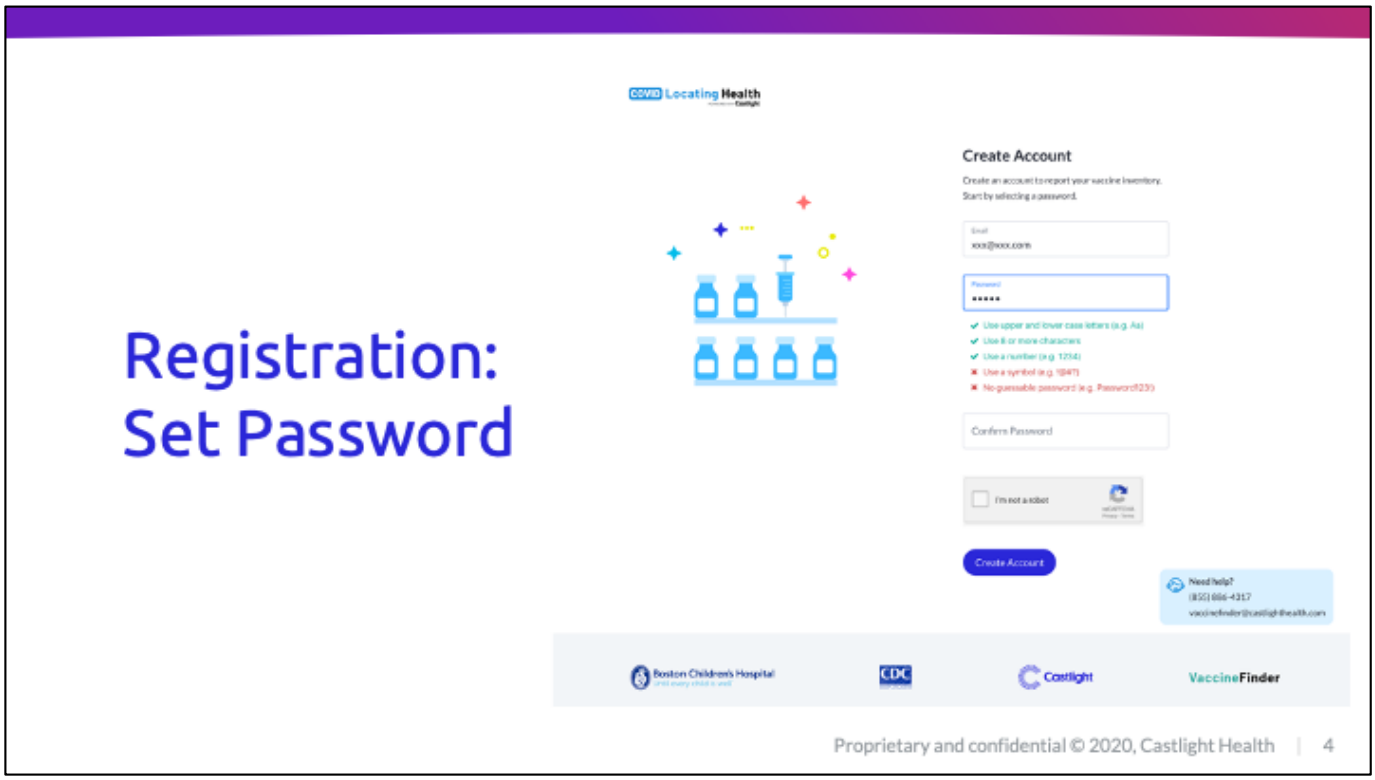
Let's get started.



[2. Register on the COVID Locating Health Platform]

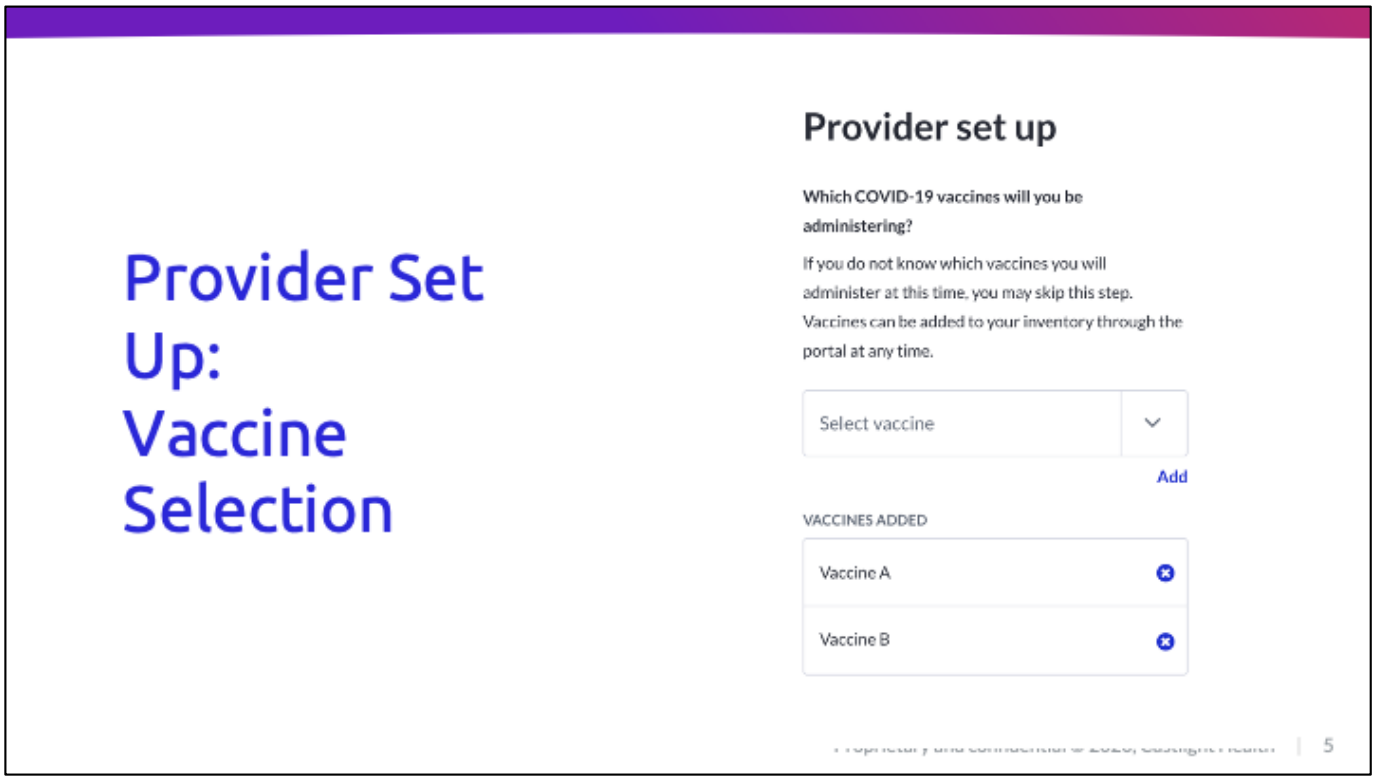
- Once a provider is enrolled through the CDC as COVID-19 vaccination provider, a VaccineFinder registration email will be triggered to **the COVID primary coordinator email address listed for the organization in section A of the provider agreement**
- The registration email will be sent from the following address: **vaccinefinder@auth.castlighthealth.com**
- Users must click *Create Account* to begin registration.
- This is a personalized link that will expire after 7 days.
- The COVID Locating Health Provider Portal is supported on Edge, Chrome, and Safari browsers

If your registration link has expired, you may contact our help desk at **vaccinefinder@castlighthealth.com** for assistance in getting a new link.



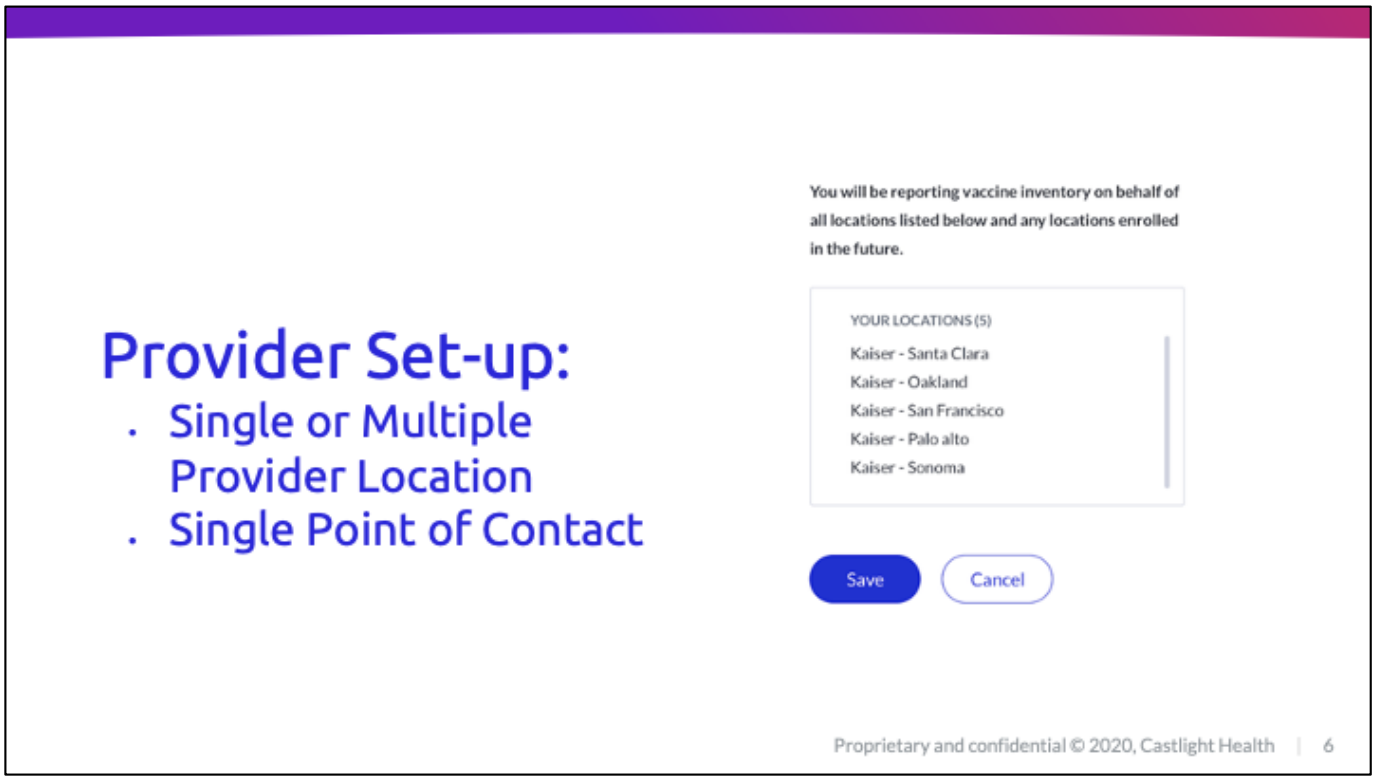
[3. Set Your Password]

- Once the user clicks on *Create Account,* they will be brought to the account creation page
- The page will pre-populate with the user's username, which is the same as the email address the registration link was sent to.
- On this page the user will be asked to choose a password
- The password must meet the following criteria for creation:
    - Use upper and lower case letters (e.g. Aa)
    - Use 8 or more characters
    - Use a number (e.g. 1234)
    - Use a symbol (e.g. !@#?)
    - No guessable password (e.g. Password123!)
    - No password containing part of username
    - No password containing first name
    - No password containing last name
- The user will be asked to confirm the password. The password typed in the confirmation box must match the original password.
- Once the user has chosen a password, they will click *Create Account* to finalize their account creation.



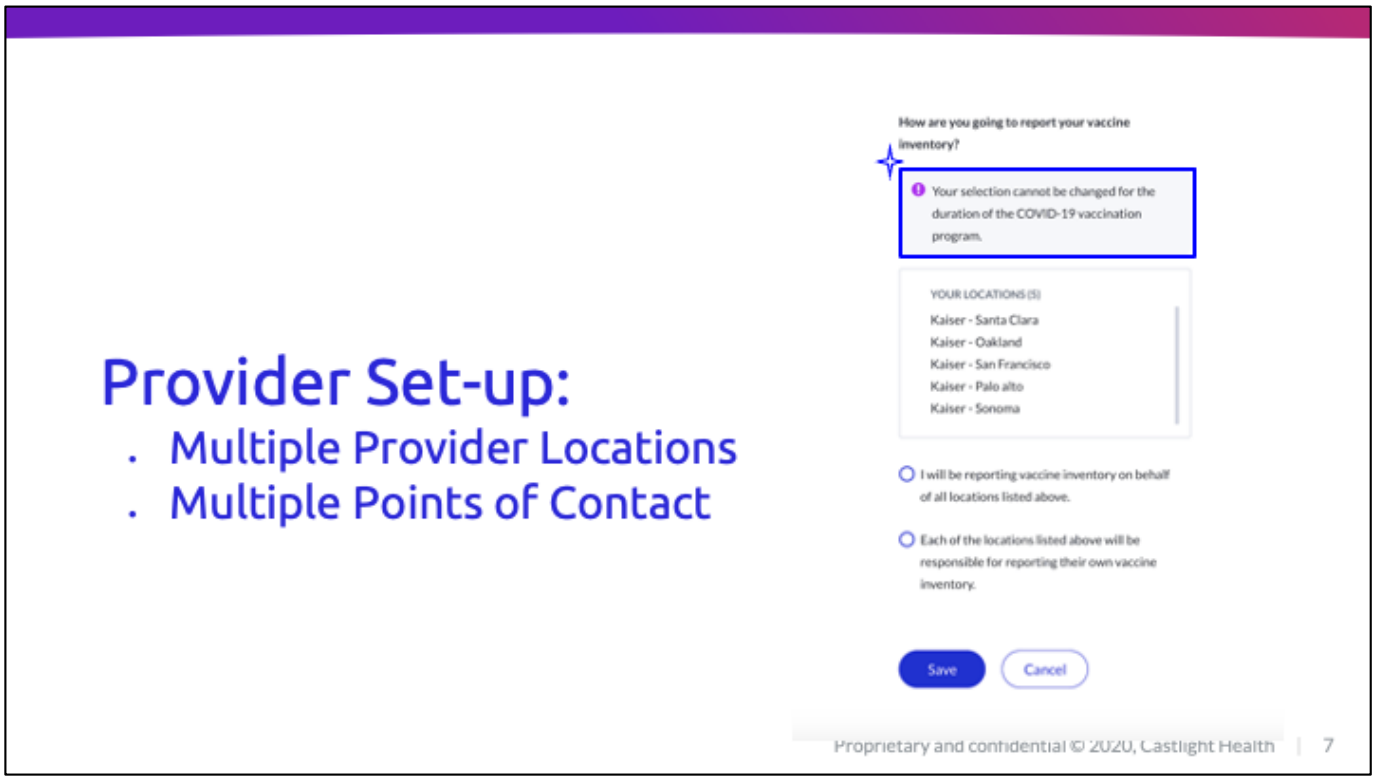
[4a. Provider Setup: Vaccine Selection]

- After creating an account, the user will be taken through a one-time provider set up page to select preferences for their account.
- The first step of the provider set up page is the vaccine selection section.
- Approved COVID-19 vaccines at the time of the user's registration will be pre-populated in a dropdown menu at the top of the provider set-up page. The user will then select the vaccine they will be administering.
- Once selected, the vaccine will appear in the box labeled *Vaccines Added.*
- Vaccines can be removed from this box if they were added in error.
- This step is optional for locations if they don't know which vaccines they will be administering at the time of sign up.
- Vaccines may be added at any time through the portal



[4b. Provider Set Up: Single Point of Contact for Single or Multiple Provider Location]

- Users who are the COVID primary contact for a single location or the only contact on file for a number of locations will be shown a list of those location(s). This is to inform the user the location(s) for which they will be responsible for reporting inventory.
- The user will then select save to acknowledge and save their previous vaccine selection.

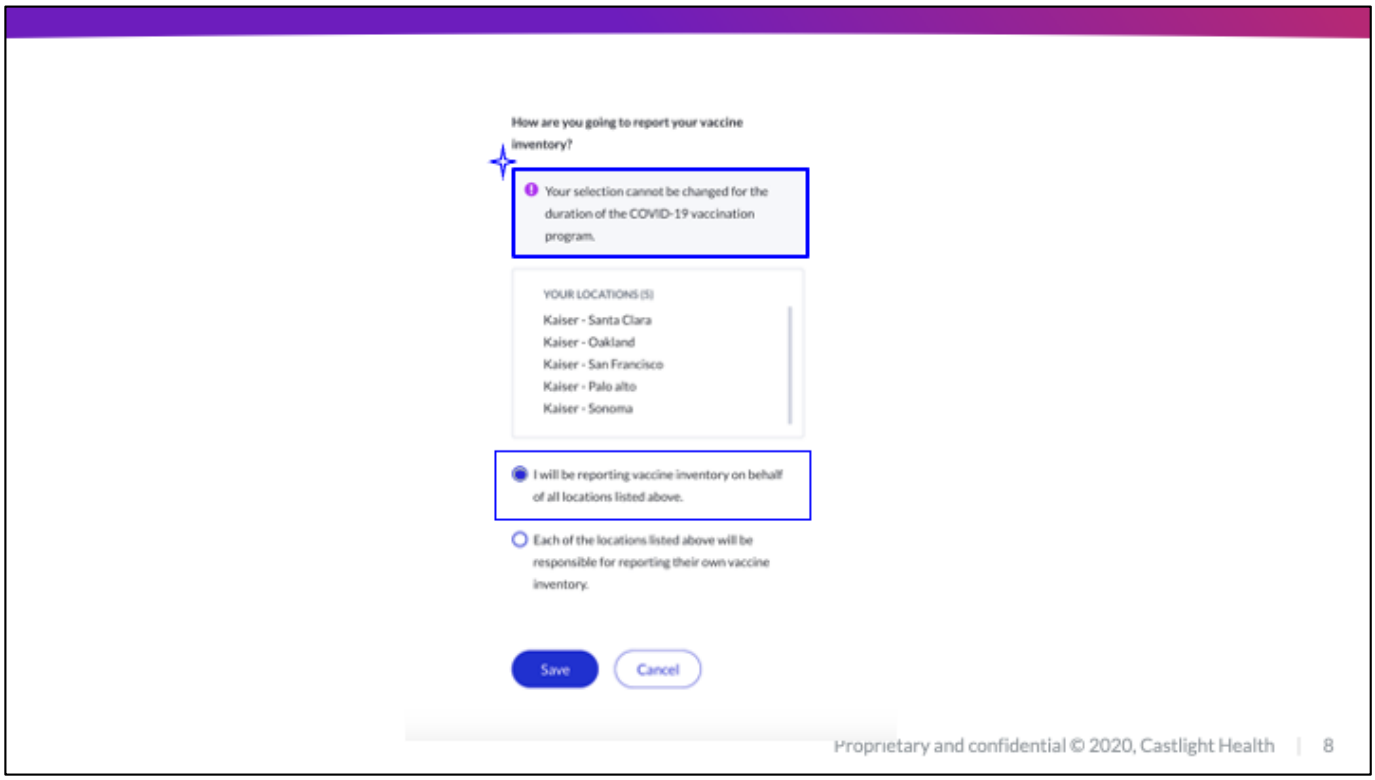


[4c. Provider Set Up: Multiple Points of Contact for Multiple Provider Locations]

Users who are listed as the **COVID contact email in section A of the provider agreement** for an entity or entities that have multiple provider locations with different contacts listed for those locations will see a second question in the provider set-up flow.

Below the box that displays the locations associated with the user will be a single select set of options for the user to choose.

- The user will be prompted to determine how they will be reporting COVID vaccine inventory. The two options are:
    - I will report inventory on behalf of all locations in my organization
    - All locations will be responsible for reporting inventory on their own behalf

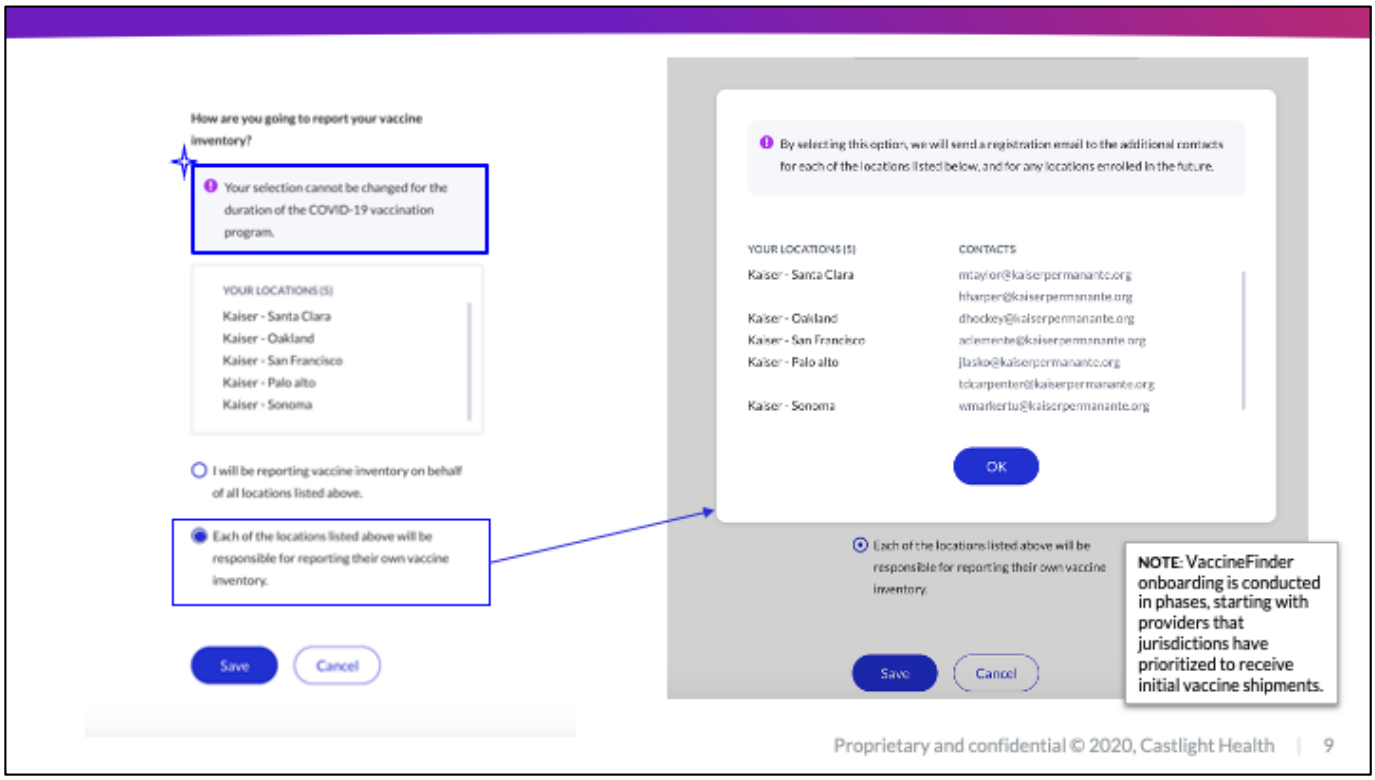


[4c. Provider Set Up: Multiple Points of Contact for Multiple Provider Locations]

Reporting Centrally:

- If a user selects that they will be reporting inventory on behalf of all locations - no additional registration emails will be sent and no other accounts will be issued at this time. The COVID contact in section A of the provider agreement will be responsible for logging inventory for all locations in the display box, as well as any additional locations added later to be associated with their email address.

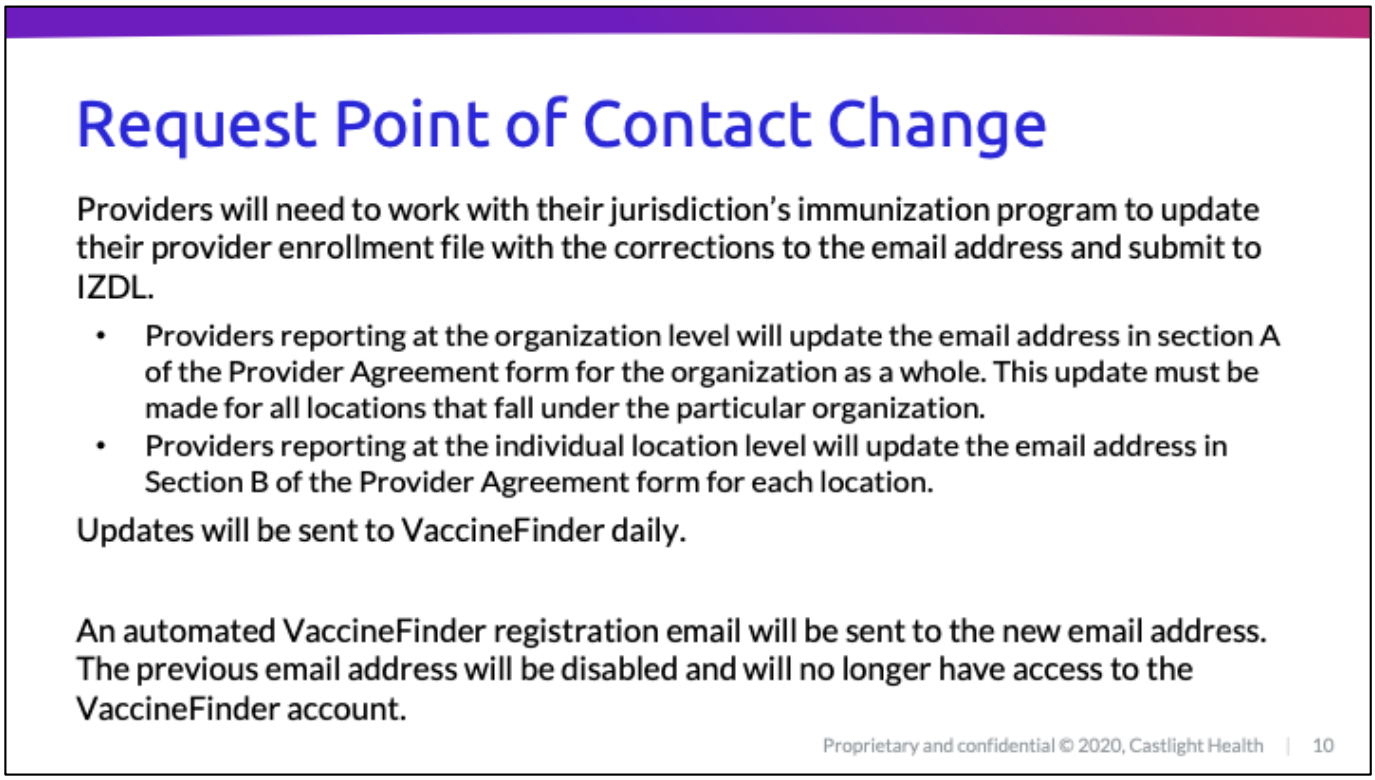
This selection cannot be undone for the duration of the COVID vaccination program.



Locations Reporting Independently:
If the user designates that they would like each individual location to report inventory on their own behalf, the user will see a pop-up screen.

- The pop-up will display the primary and secondary contact emails on file for each location.
- By selecting the option for locations to report in on their own behalf, the user will trigger registration emails to all emails on that list.
- The user must click OK to acknowledge this choice.
- The user may then hit save to register all preferences in the system.
    - The user will then be brought to a thank you for registering page. Upon subsequent logins the user will have a read only view of the provider location's reported inventory.
    - The primary and secondary contacts for the locations will receive a registration email and follow the provider set-up flow as a single provider location.

This selection cannot be undone for the duration of the COVID vaccination program.



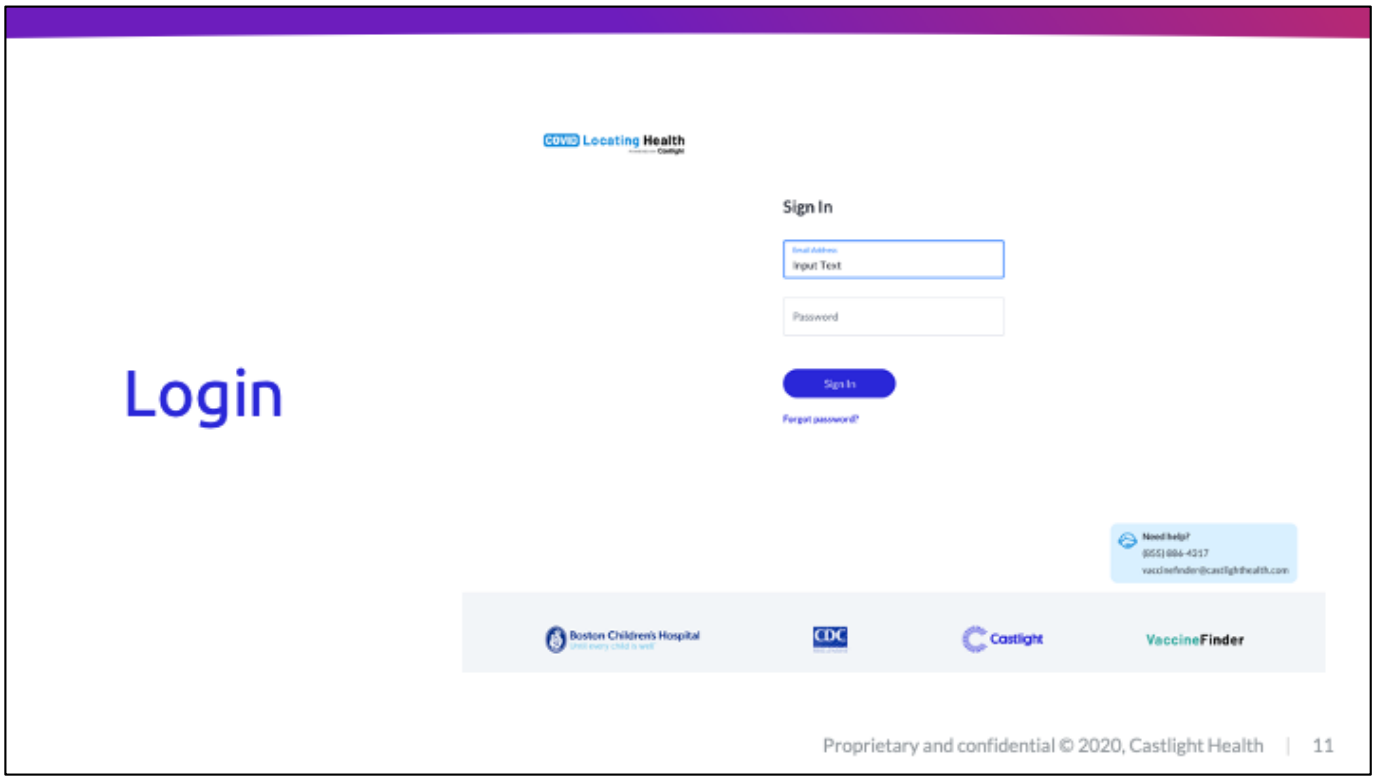
[5. Request Point of Contact Change]

If the email addresses listed are not the correct points of contact for the organization or locations changes can be made through their jurisdiction. Providers will need to work with their jurisdiction's immunization program to update their provider enrollment file with the corrections to the email address and submit to IZDL.

- Providers reporting at the organization level will update the email address in section A of the Provider Agreement form for the organization as a whole. This update must be made for all locations that fall under the particular organization.
- Providers reporting at the individual location level will update the email address in Section B of the Provider Agreement form for each location.

Updates will be sent to VaccineFinder daily.

An automated VaccineFinder registration email will be sent to the new email address. The previous email address will be disabled and will no longer have access to the VaccineFinder account.

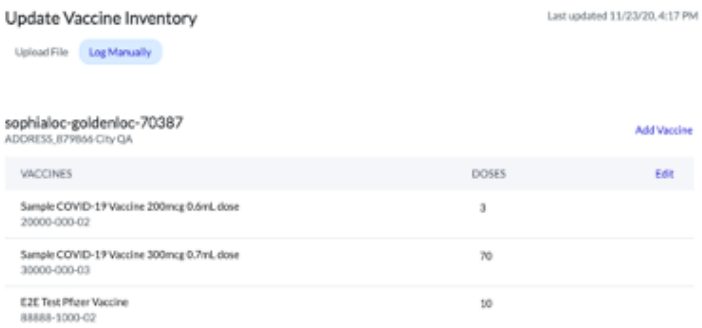


[6. Login]

- Once a user has completed the provider set up they will be brought out to the COVID Locating Health Provider Portal login screen.
- This is the page users can visit daily to log into their account.
- This screen also allows for the user to initiate the forgot password flow and trigger an email to reset their password.

Tip: bookmark https://covid.locating.health for future visits!

Log Manually: Overview



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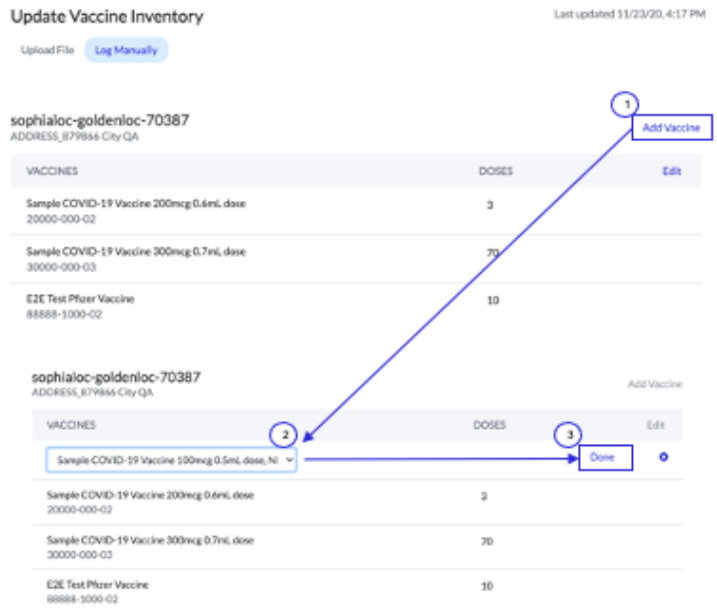
[7a. Log Manually: Overview]

- The log manually screen is recommended for users reporting inventory for fewer than 5 locations.
- The manual entry screen will display all the locations for a particular user.
- From this view the user may take two actions:
    - Add a vaccine to the location for inventory reporting
    - Report inventory for individual NDCs at each location

Log Manually: Add Vaccine



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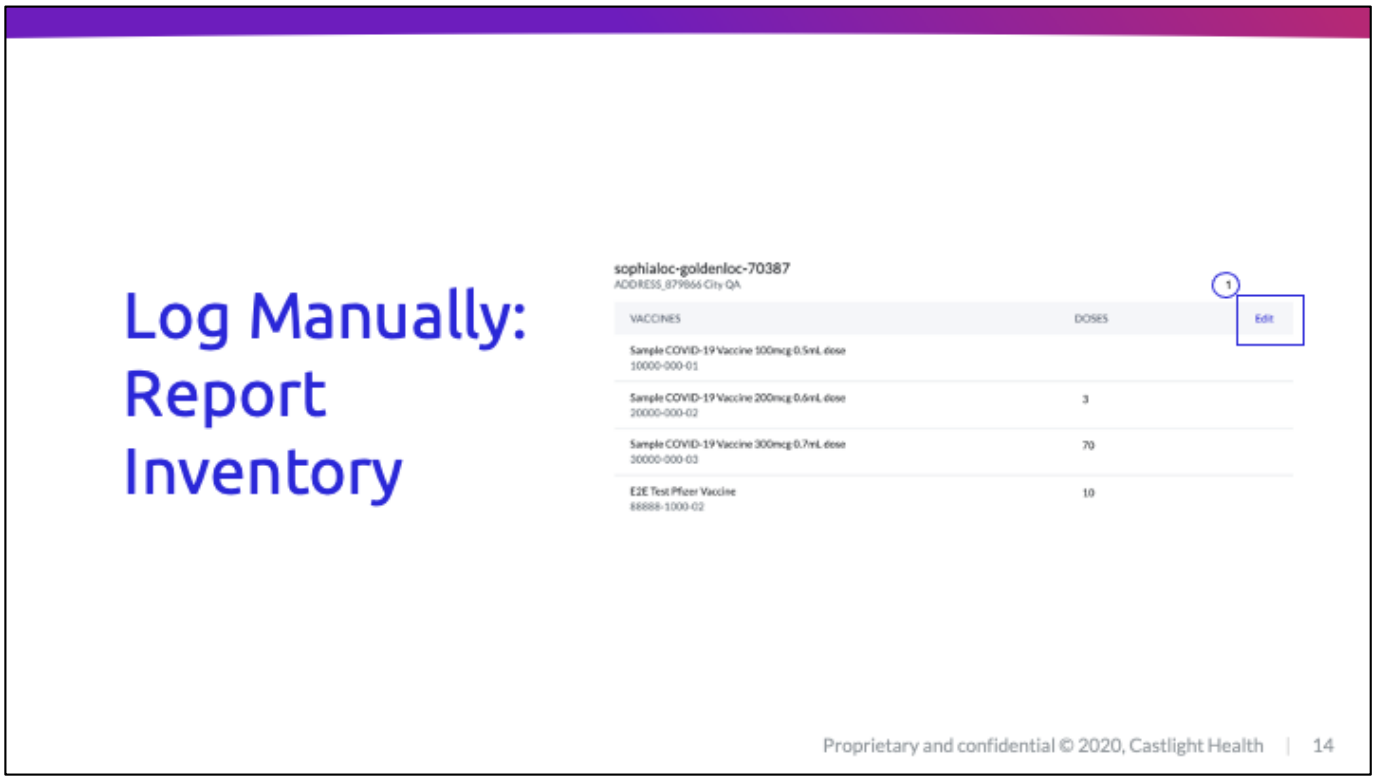
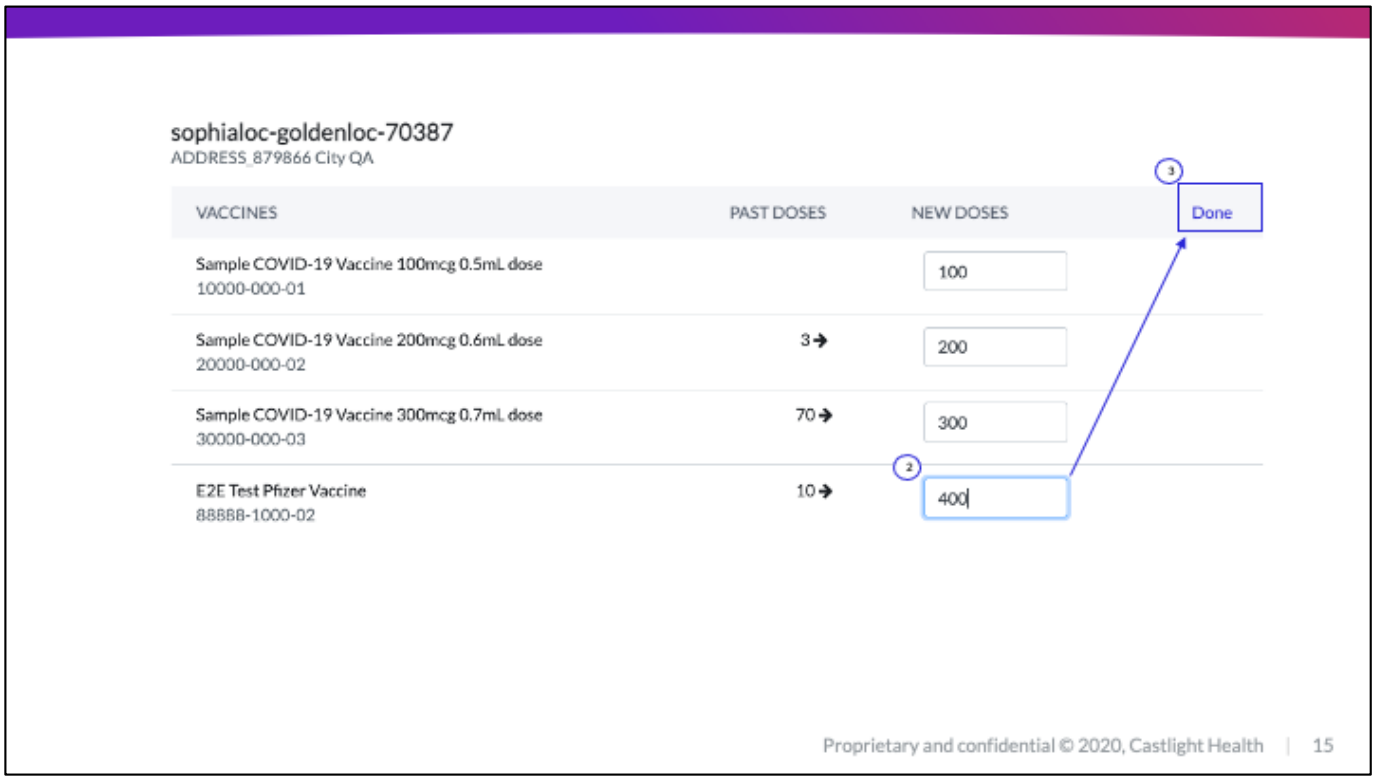
[7b. Log Manually: Add Vaccine]

- To add a vaccine to a location through the log manually screen, a user simply clicks on the *Add Vaccine* button above the location they wish to add to.
- The screen will then show a drop-down selection below the location name.
- The user can then use the drop down to select the vaccine they would like to add to the location.
- Once they have selected the vaccine, they can click done to add that vaccine to the list for that location.



[7c. Log Manually: Report Inventory]

- To report inventory through the log manually screen, a user can select the *Edit* button located below the provider location.
  - By selecting this button, the user will see an option to enter new doses, while still being able to view the current doses reported.
  - The user will then enter the number of doses on hand at the end of the day for each vaccine listed.
  - Once a user has reported the inventory, they can select done to move on to the next location or submit their inventory.
  - Once a user has updated inventory for all locations and NDCs they wish to update, they may click the button *Submit Inventory* to save their data.
  - Once a user submits, they will see a success message pop-up.
  - The user will then see their most recently saved inventory on hand displayed for each NDC.
  - Vaccine Finder will report the most recent inventory data to the CDC at 5AM EST daily.



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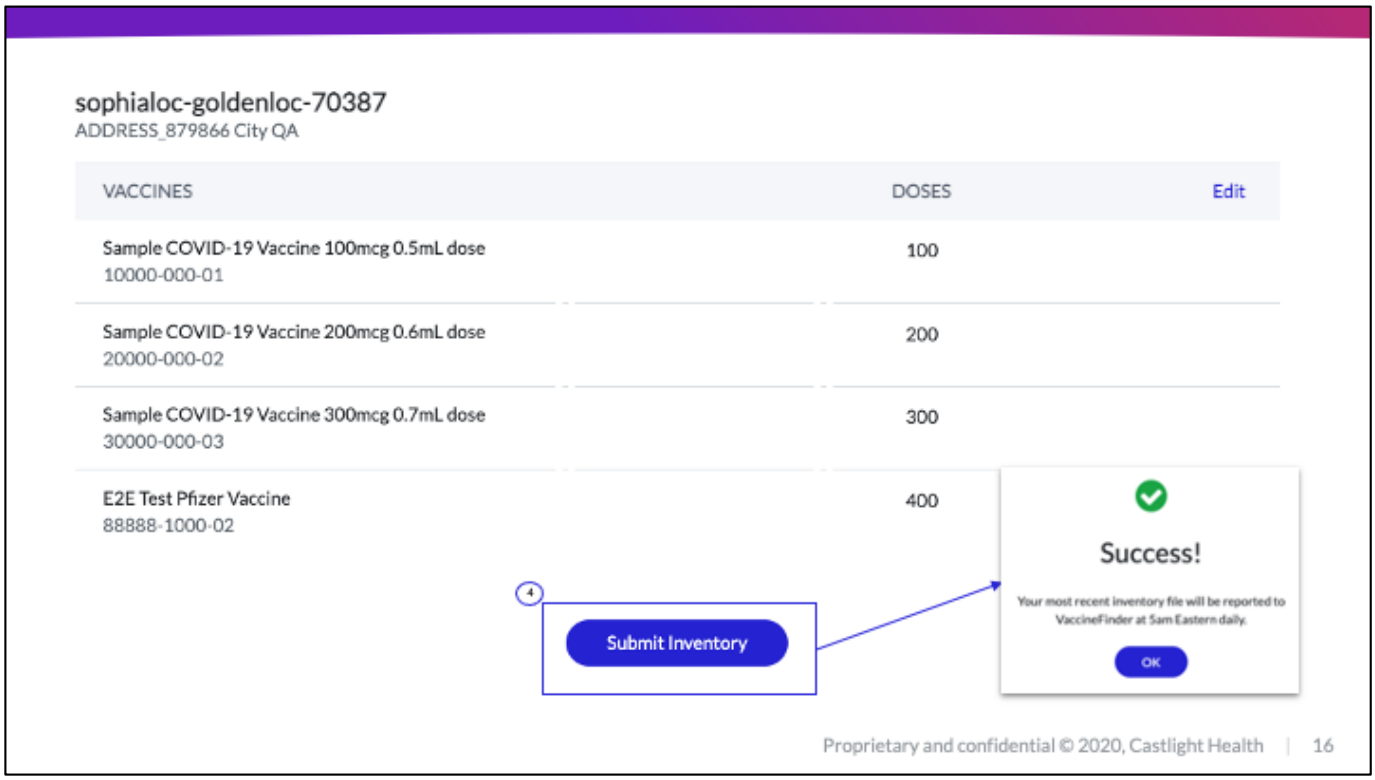

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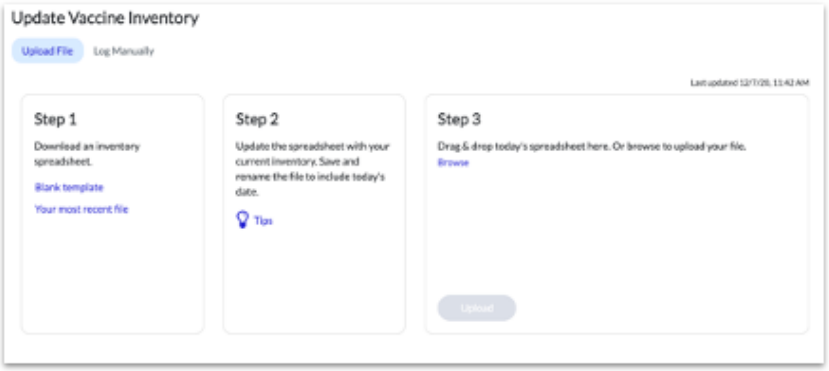
File Upload: Overview



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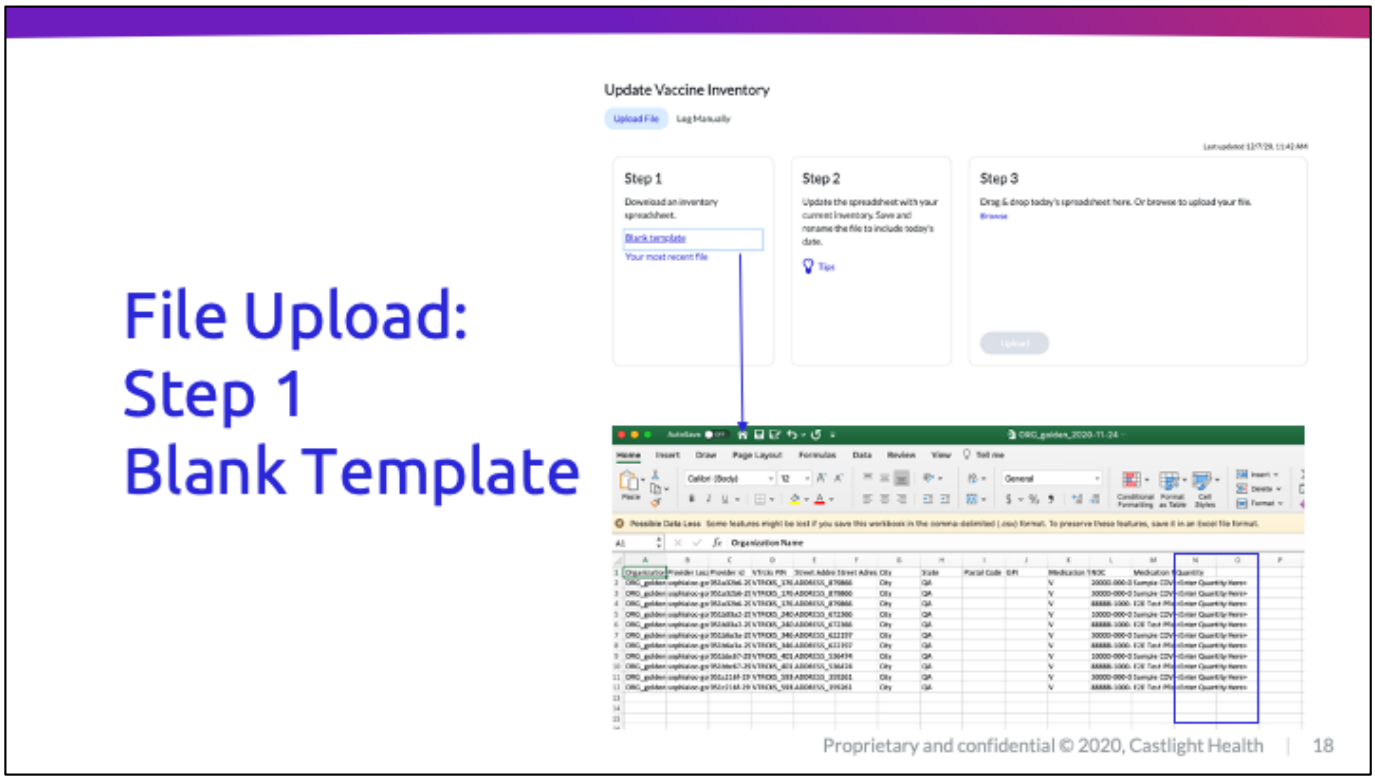
[8a. File Upload: Overview]

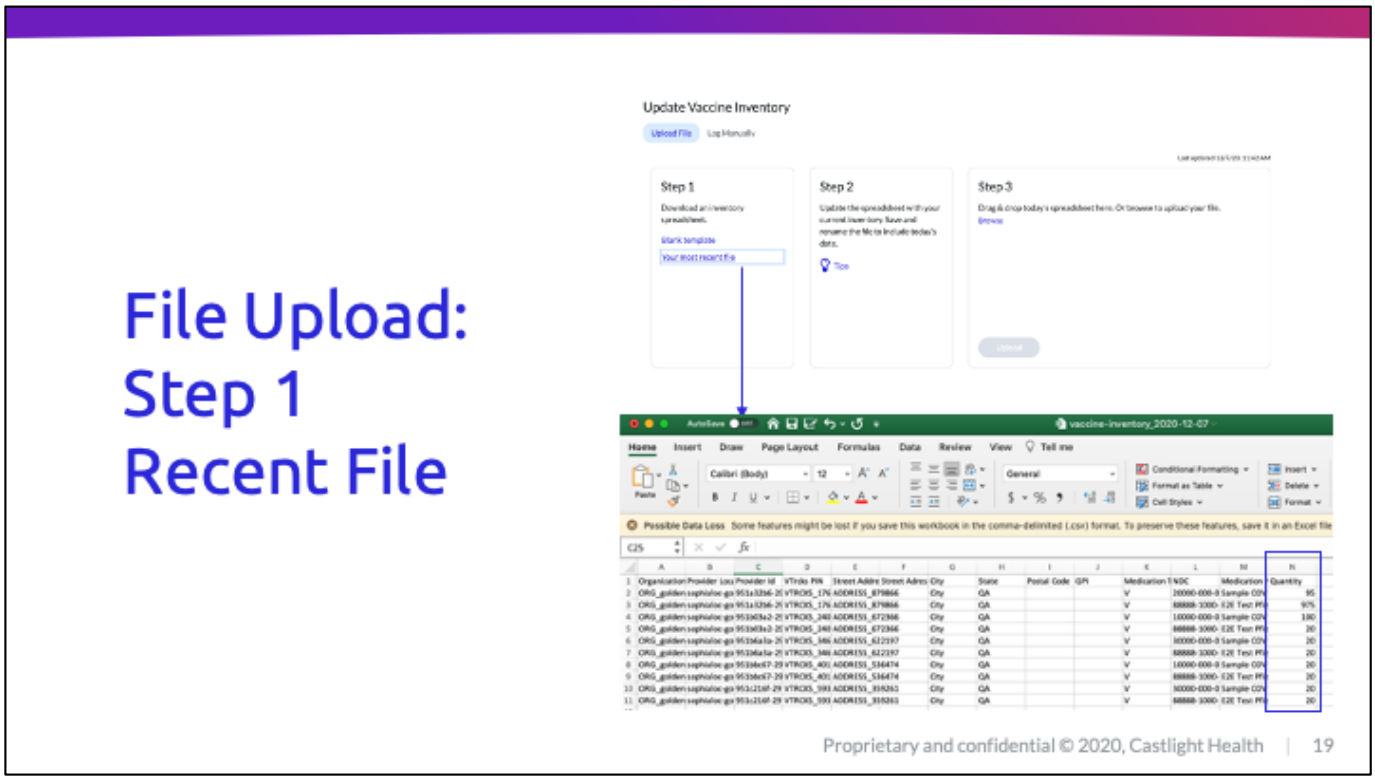
- The file upload screen is recommended for any organization or jurisdiction reporting inventory for multiple locations.
- The file upload process allows for editing quantity on hand in bulk through a flat file upload.
    - From this view you can:
    - Download a template file
    - Download your most recent inventory
    - Upload your daily inventory
    - Add/Remove vaccine



[8b: File Upload: Step 1- Download File]

Step 1: Blank template

- To begin updating inventory through the bulk file screen, the user will first select the *Blank Template* button from the box labeled Step 1. In subsequent uploads the user may also select to download the most recent inventory. More on that in the following screen.
- This template will be pre-populated with identifying information for all locations listed in VaccineFinder for the user.
- The template will also pre-populate with any vaccines selected during the provider set-up or added through the log manually screen.
- Each line of the template corresponds to an NDC for a single vaccine at a location. This means that if a location is administering two COVID-19 vaccines (for example: Moderna and Pfizer), that location will have two rows in the file, one for each NDC.
- The template will have <Enter Quantity Here> in the quantity column to prompt the user to update the quantity on-hand.
- The file will automatically update with any new locations that may be added to the user's organization throughout the COVID vaccination program.

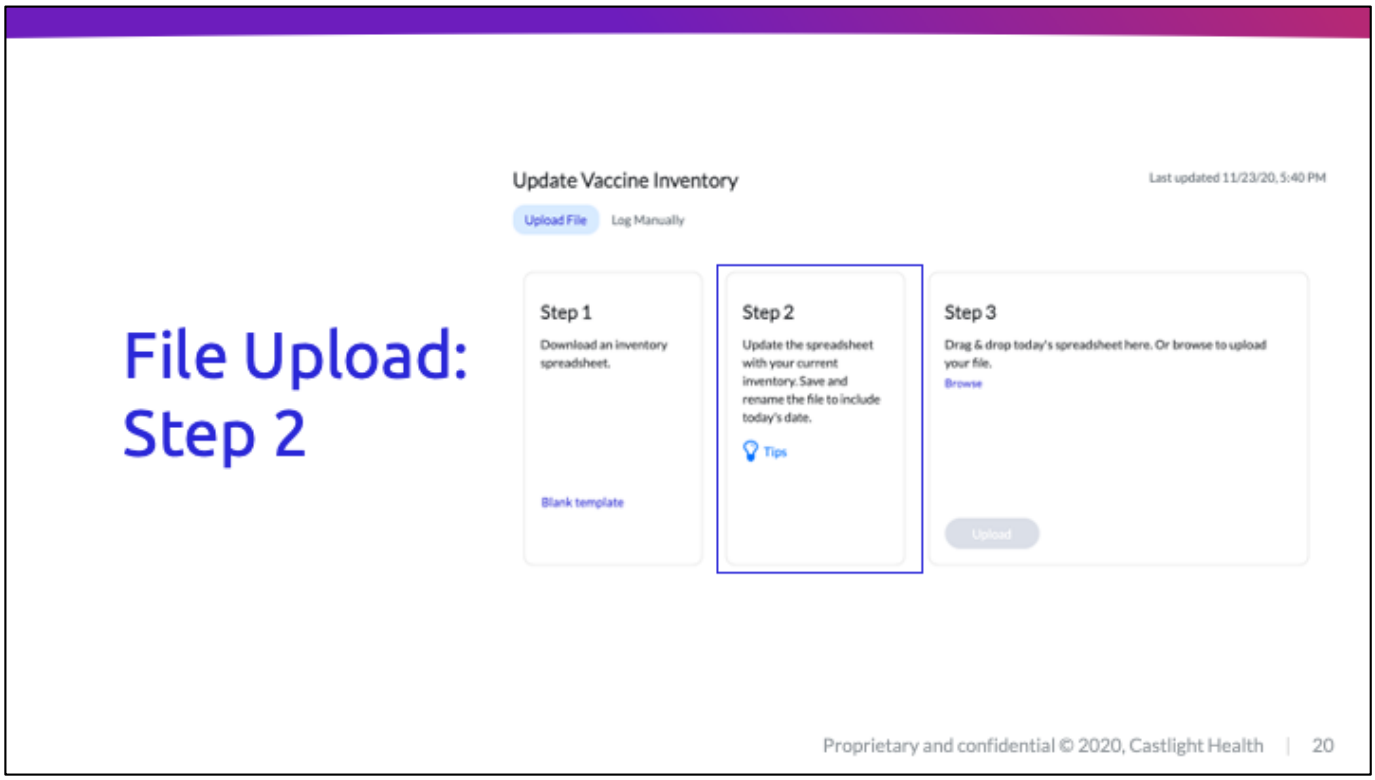


[8c: File Upload: Step 1- Download File]

Step 1: Your most recent file

- After a user has uploaded inventory once through the portal, that information will be captured in the database and can be seen by selecting the “Your most recent file” option in step 1 of the upload file screen
- This will download a .csv that is the same as the blank template file, with the exception of the quantity field. Instead of <Enter Quantity Here> the column Quantity will be pre-populated with the last reported inventory for that NDC for each site.

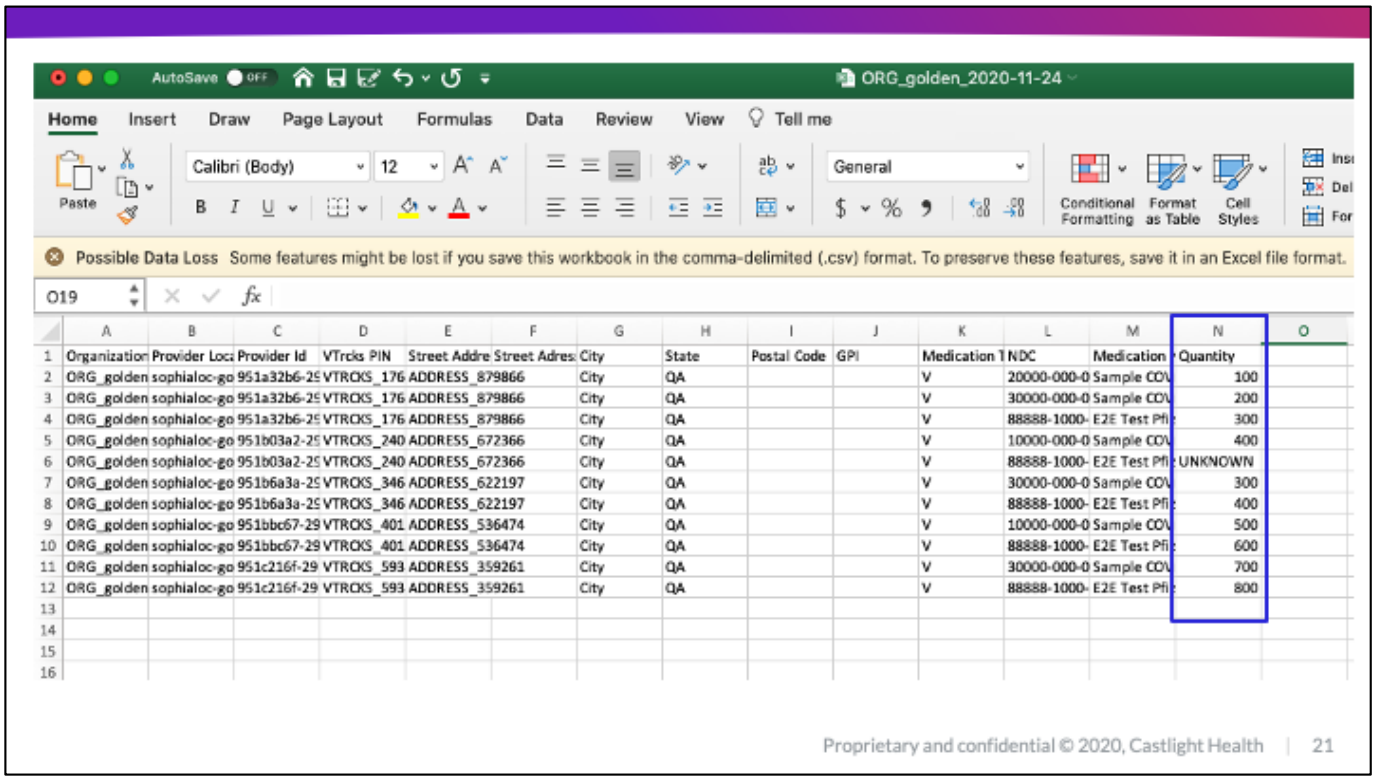
This file can also be used to upload new quantity data on hand each day; users can simply update the quantity column with the current number of doses on hand



[8d. File Upload: Step 2 - Log Inventory]

- Step 2 is to update inventory for all locations
- To report inventory daily, the user simply needs to update the quantity field with the doses on hand for each vaccine listed for the provider locations.
- The user can enter the number of doses in the corresponding row for that NDC.
- If the user does not know the quantity on-hand for a particular NDC at a location, they may also enter UNKNOWN in the quantity field.
- The user may also skip the row if there is no inventory to report.
- Once the user has updated the quantity field, the user must save the file with the changes made.

Tip: Saving the file with the current date will help identify the correct file for upload
Tip: Saving the file to the same location each day, like the desktop or a specific folder on the hard drive will also help to locate the correct file for upload



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Organization	Provider Loca	Provider Id	VTrcks PIN	Street Addre	Street Adres	City	State	Postal Code	GPI	Medication T	NDC	Medication	Quantity	
2	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	20000-000-0	Sample CO\	100	
3	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	30000-000-0	Sample CO\	200	
4	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	88888-1000-	E2E Test Pfi	300	
5	ORG_golden	sophialoc-go	951b03a2-25	VTRCKS_240	ADDRESS_672366		City	QA			V	10000-000-0	Sample CO\	400	
6	ORG_golden	sophialoc-go	951b03a2-25	VTRCKS_240	ADDRESS_672366		City	QA			V	88888-1000-	E2E Test Pfi	UNKNOWN	
7	ORG_golden	sophialoc-go	951b6a3a-25	VTRCKS_346	ADDRESS_622197		City	QA			V	30000-000-0	Sample CO\	300	
8	ORG_golden	sophialoc-go	951b6a3a-25	VTRCKS_346	ADDRESS_622197		City	QA			V	88888-1000-	E2E Test Pfi	400	
9	ORG_golden	sophialoc-go	951bbc67-29	VTRCKS_401	ADDRESS_536474		City	QA			V	10000-000-0	Sample CO\	500	
10	ORG_golden	sophialoc-go	951bbc67-29	VTRCKS_401	ADDRESS_536474		City	QA			V	88888-1000-	E2E Test Pfi	600	
11	ORG_golden	sophialoc-go	951c216f-29	VTRCKS_593	ADDRESS_359261		City	QA			V	30000-000-0	Sample CO\	700	
12	ORG_golden	sophialoc-go	951c216f-29	VTRCKS_593	ADDRESS_359261		City	QA			V	88888-1000-	E2E Test Pfi	800	
13															
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- The user can enter the number of doses in the corresponding row for that NDC.
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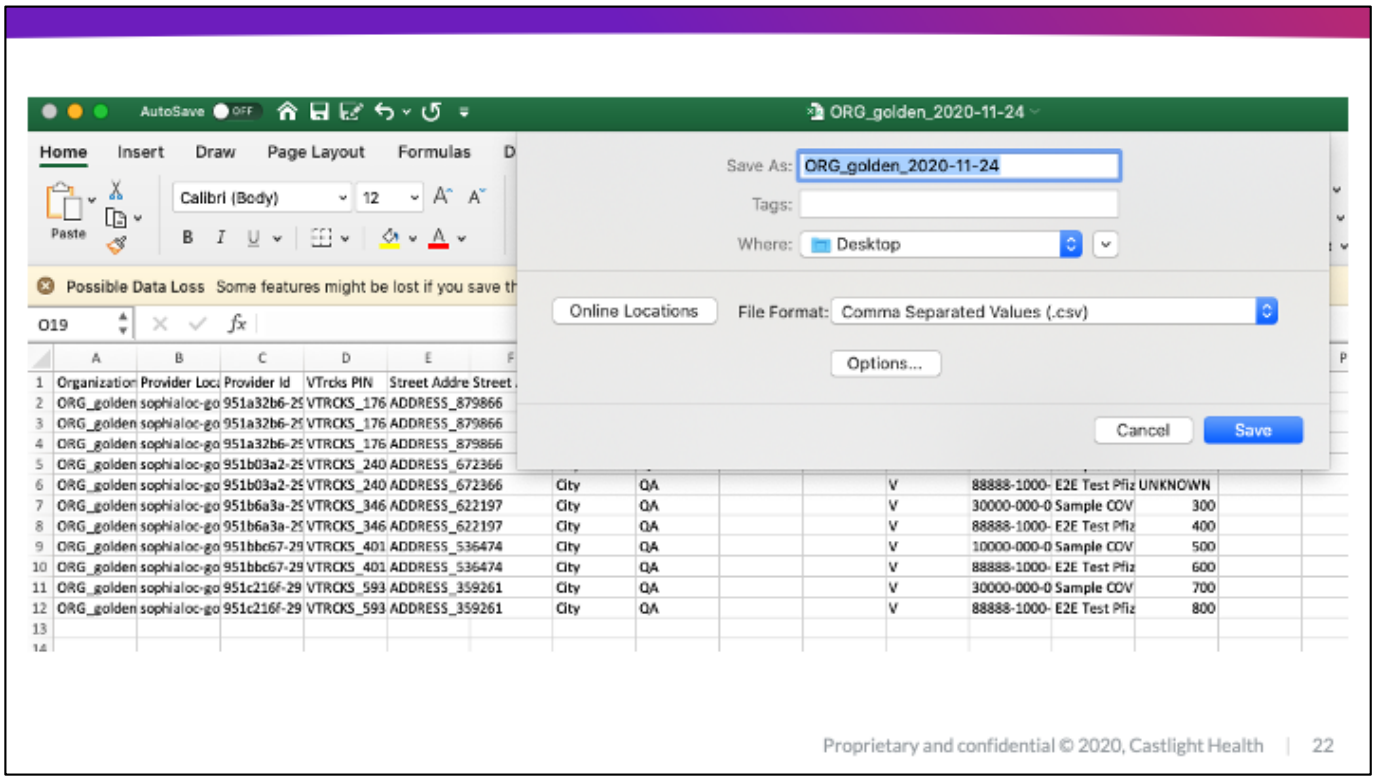
- The user may also skip the row if there is no inventory to report.
- Once the user has updated the quantity field, the user must save the file with the changes made.

Tip: Saving the file with the current date will help identify the correct file for upload

Tip: Saving the file to the same location each day, like the desktop or a specific folder on the hard drive will also help to locate the correct file for upload



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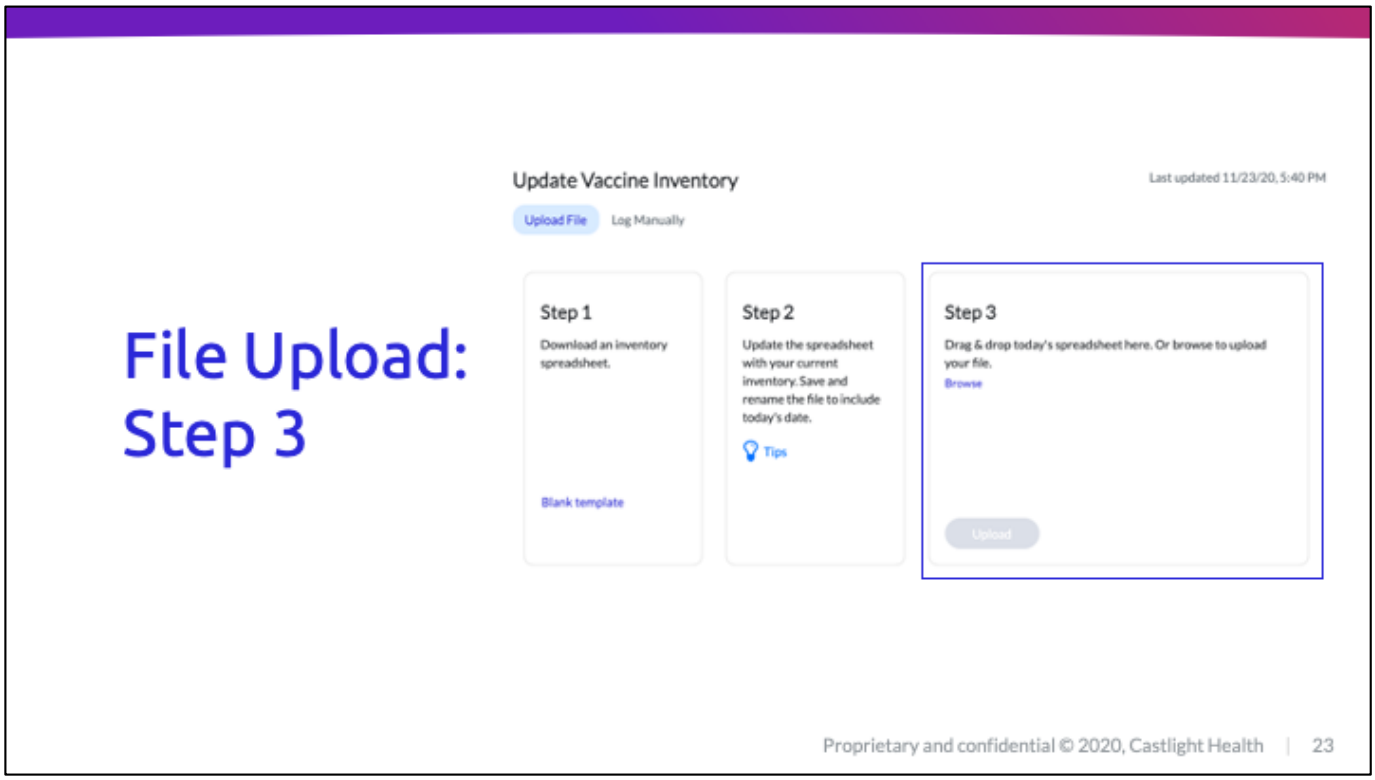
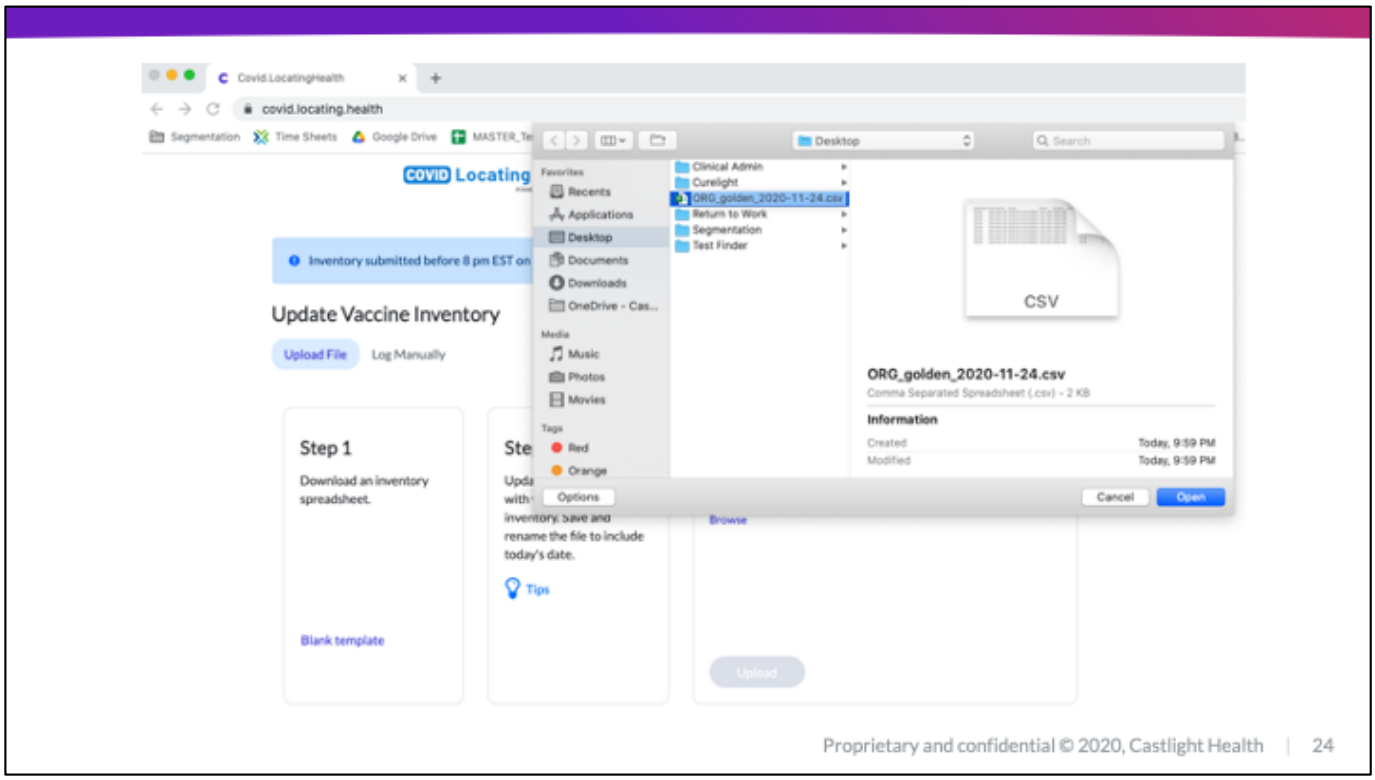


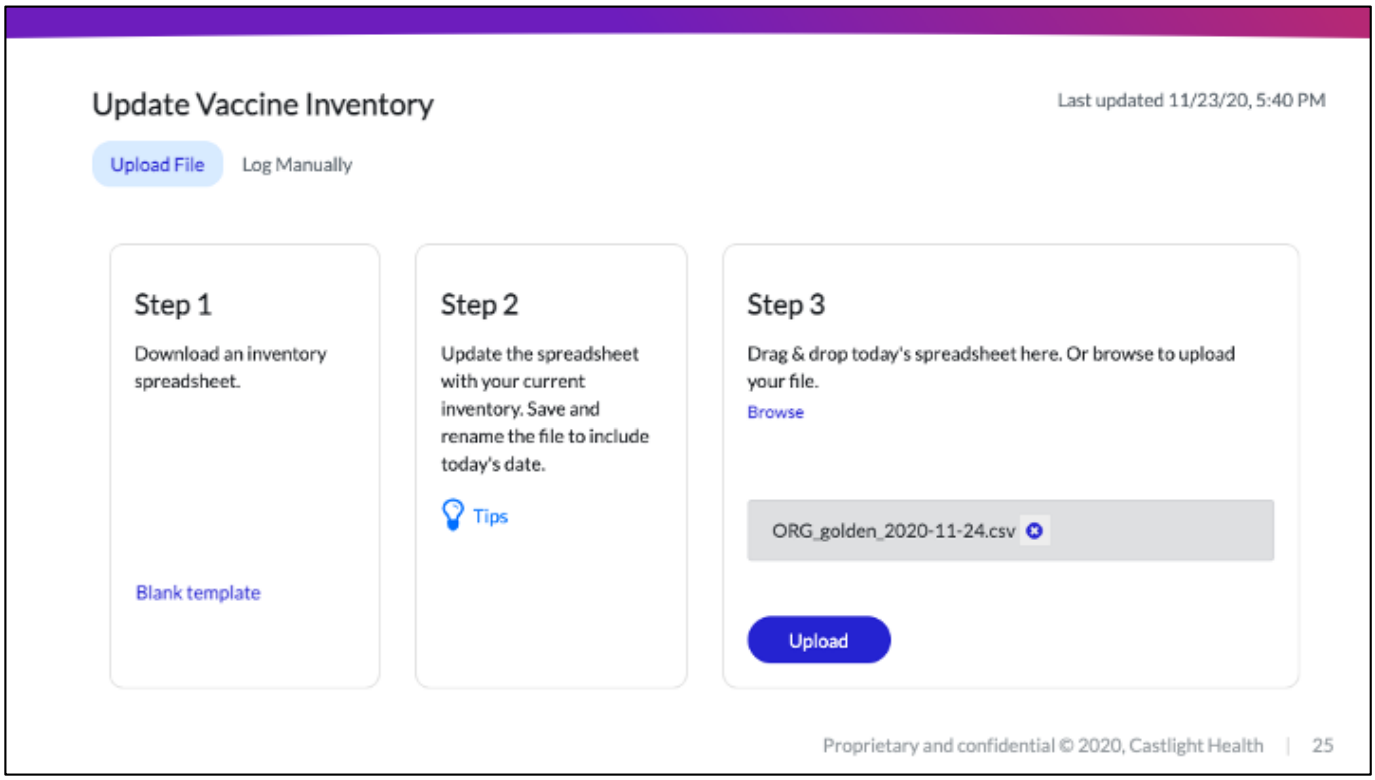
[8e. File Upload: Step 3 – Upload File]

- Once the user has saved the current inventory, they are ready to upload the file.
- To upload the file, the user must click Browse in the box labeled Step 3.
- The user will then select the file they wish to upload.
- If the user selects the wrong file, they may clear that file out by selecting the small X on the file.
- Once the user has selected the file, they must select the Upload button to process the file.
- The file will be processed and validated as it is uploaded into the Vaccine Finder system.
- If the upload is successful, the user will see the green success screen.
- If there is an error, the user will be shown an error screen. The error screen will report the row(s) where an error appeared in the file and a brief description of the error. The user will then be prompted to try again.
- A user is allowed to upload as many files per day as they need by selecting the *Browse Again* button. The latest inventory reported at 5AM EST will be sent to the CDC.
- A user will be able to download the updated inventory as well as see how many records were updated due to the most recent upload.



[8e. File Upload: Step 3 – Upload File]

- Once the user has saved the current inventory, they are ready to upload the file.
- To upload the file, the user must click Browse in the box labeled Step 3.
- The user will then select the file they wish to upload.
- If the user selects the wrong file, they may clear that file out by selecting the small X on the file.
- Once the user has selected the file, they must select the Upload button to process the file.
- The file will be processed and validated as it is uploaded into the Vaccine Finder system.
- If the upload is successful, the user will see the green success screen.
- If there is an error, the user will be shown an error screen. The error screen will report the row(s) where an error appeared in the file and a brief description of the error. The user will then be prompted to try again.
- A user is allowed to upload as many files per day as they need by selecting the *Browse Again* button. The latest inventory reported at 5AM EST will be sent to the CDC.
- A user will be able to download the updated inventory as well as see how many records were updated due to the most recent upload.



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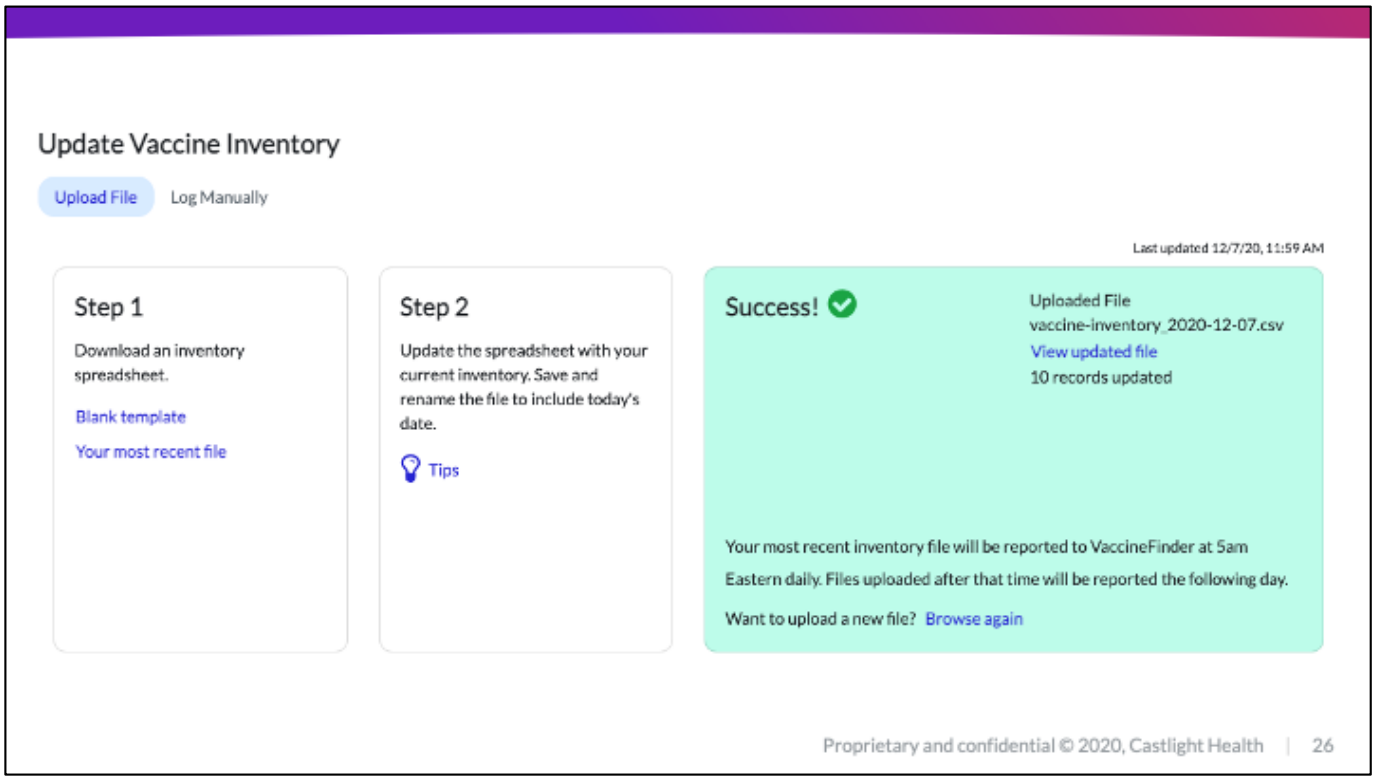

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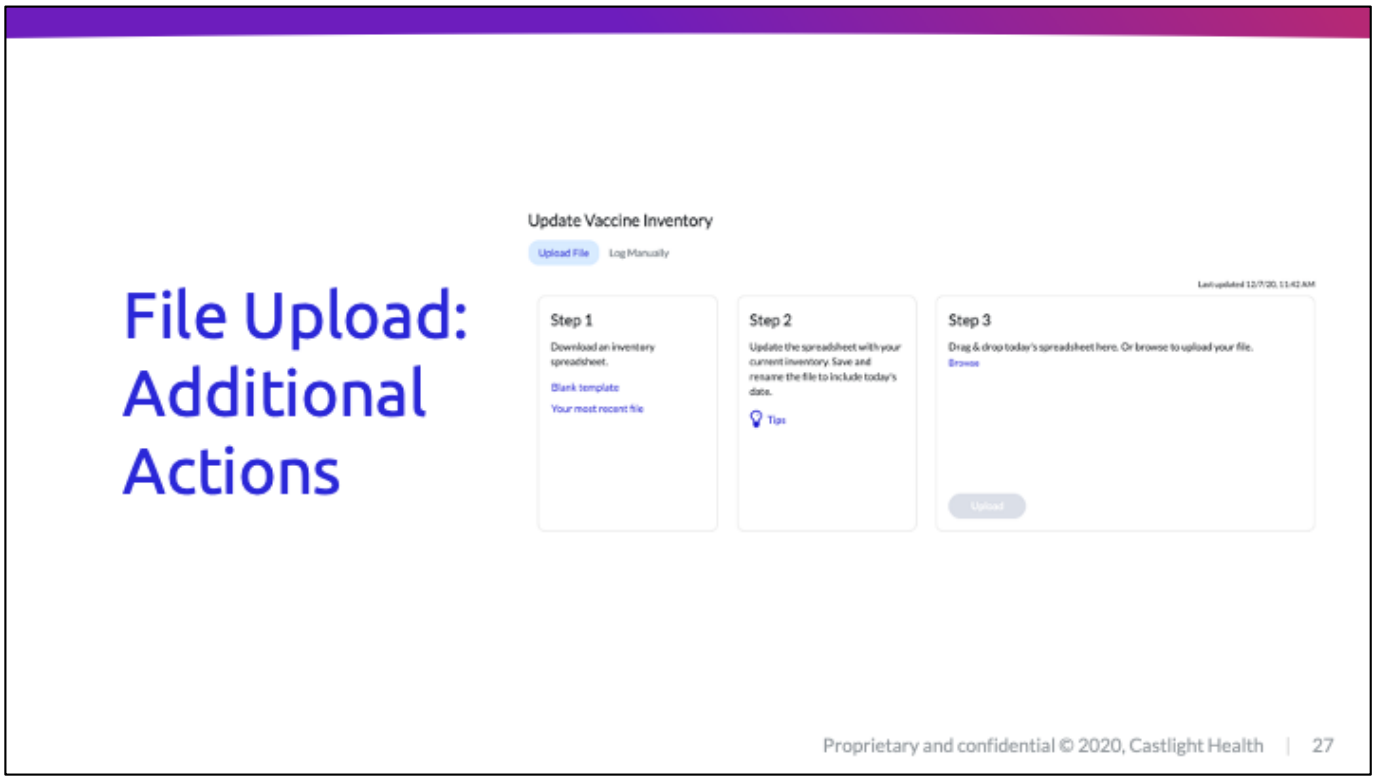
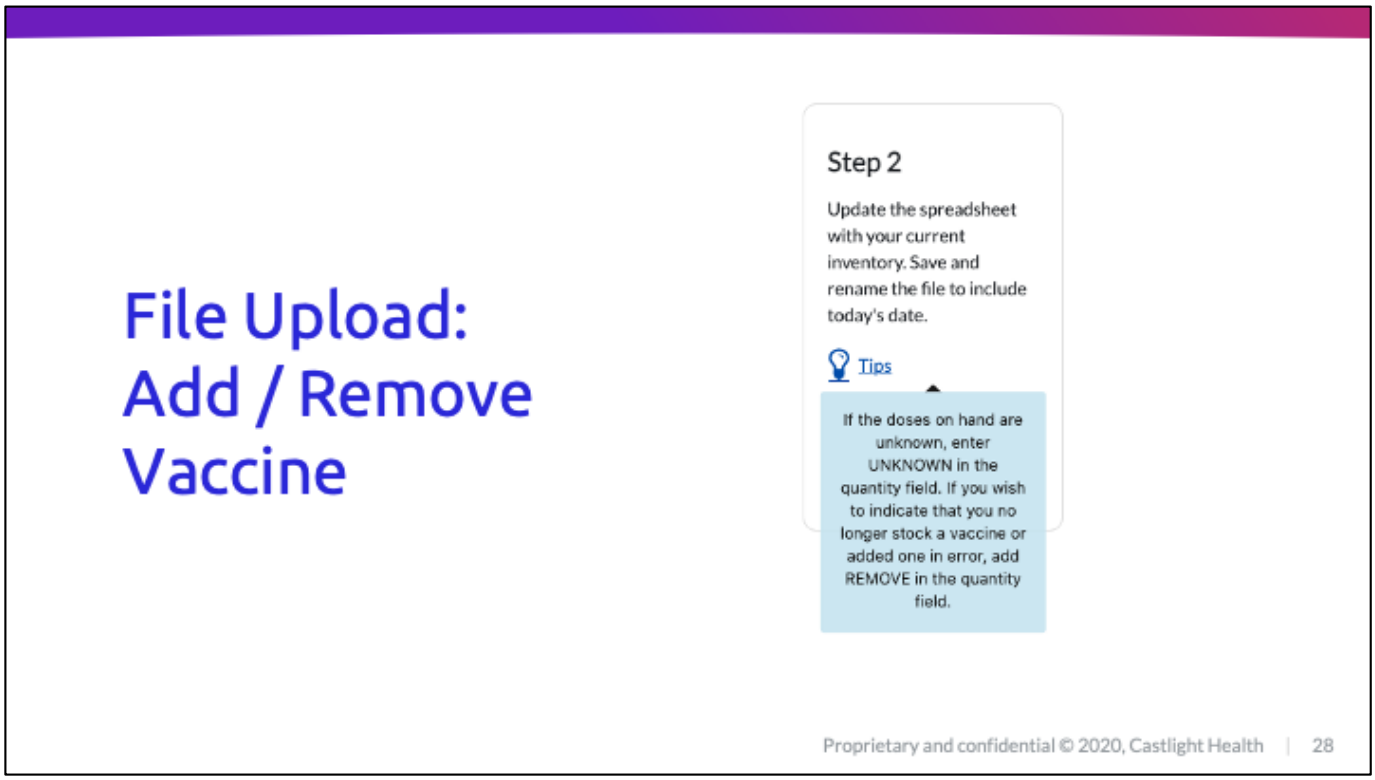


[8f. File Upload: Add/Remove Vaccine]

- A user may also add or remove vaccine through the file upload.
    - To remove a vaccine simply type REMOVE into the quantity field for that row.
    - To add a vaccine, the user must create a new row in the template and copy over all the location information. The user can then type in the new NDC, enter a quantity and save the file.
- All changes will be saved upon upload and will be present in any subsequent template downloads.



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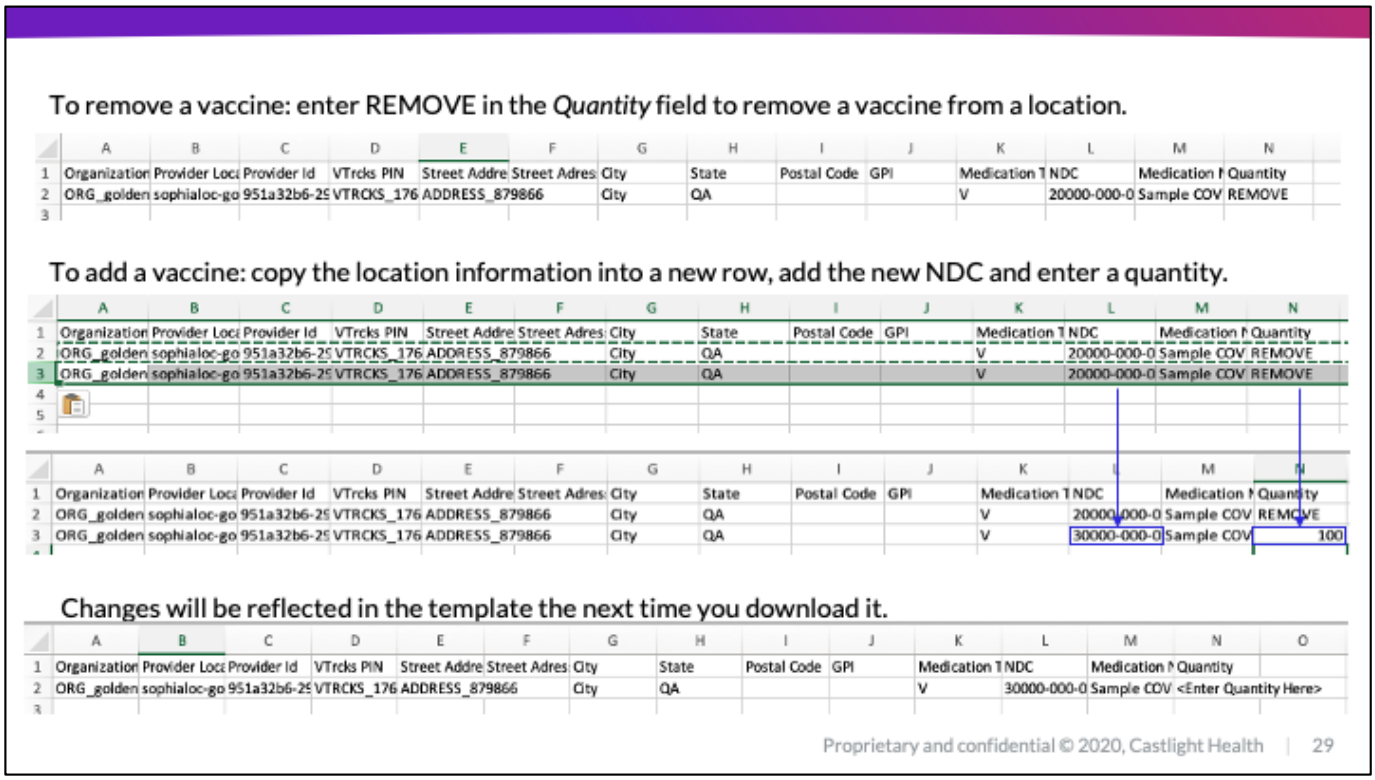

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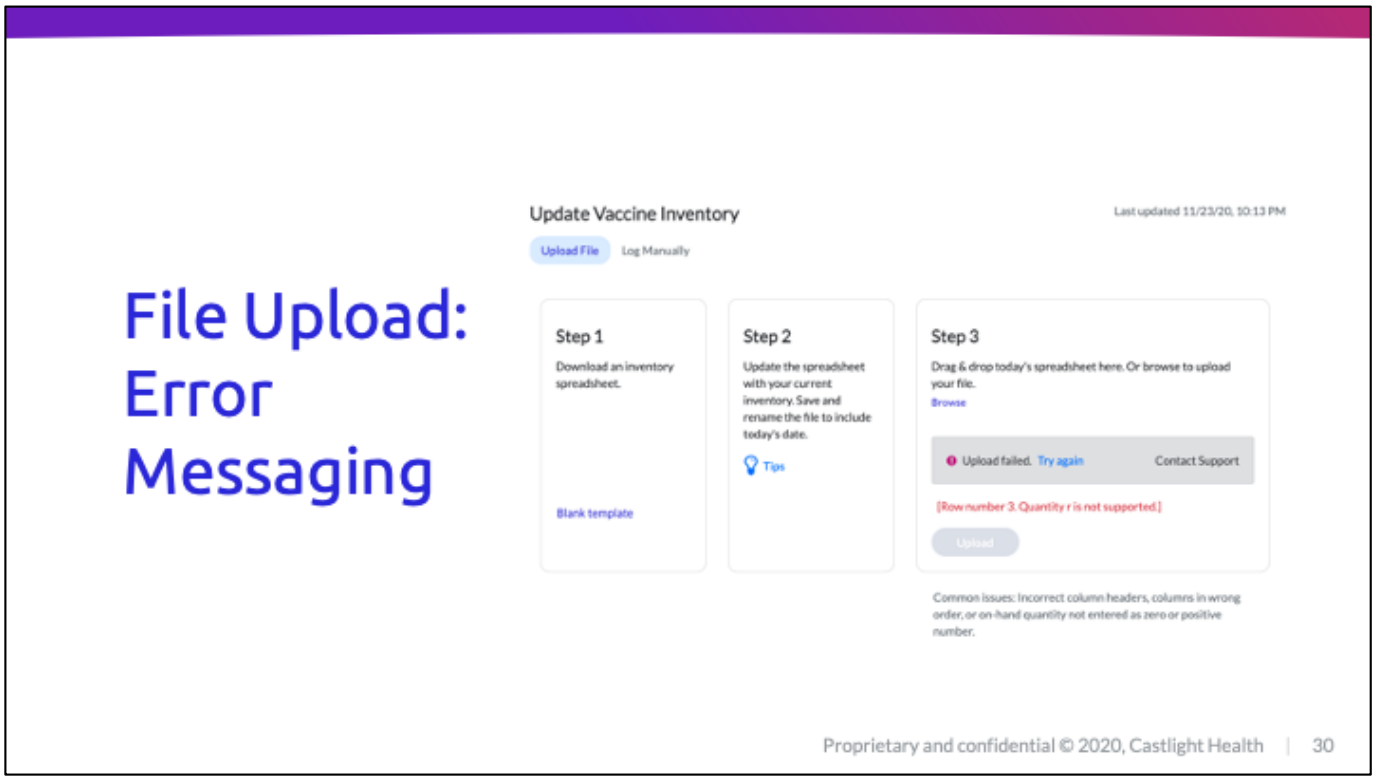
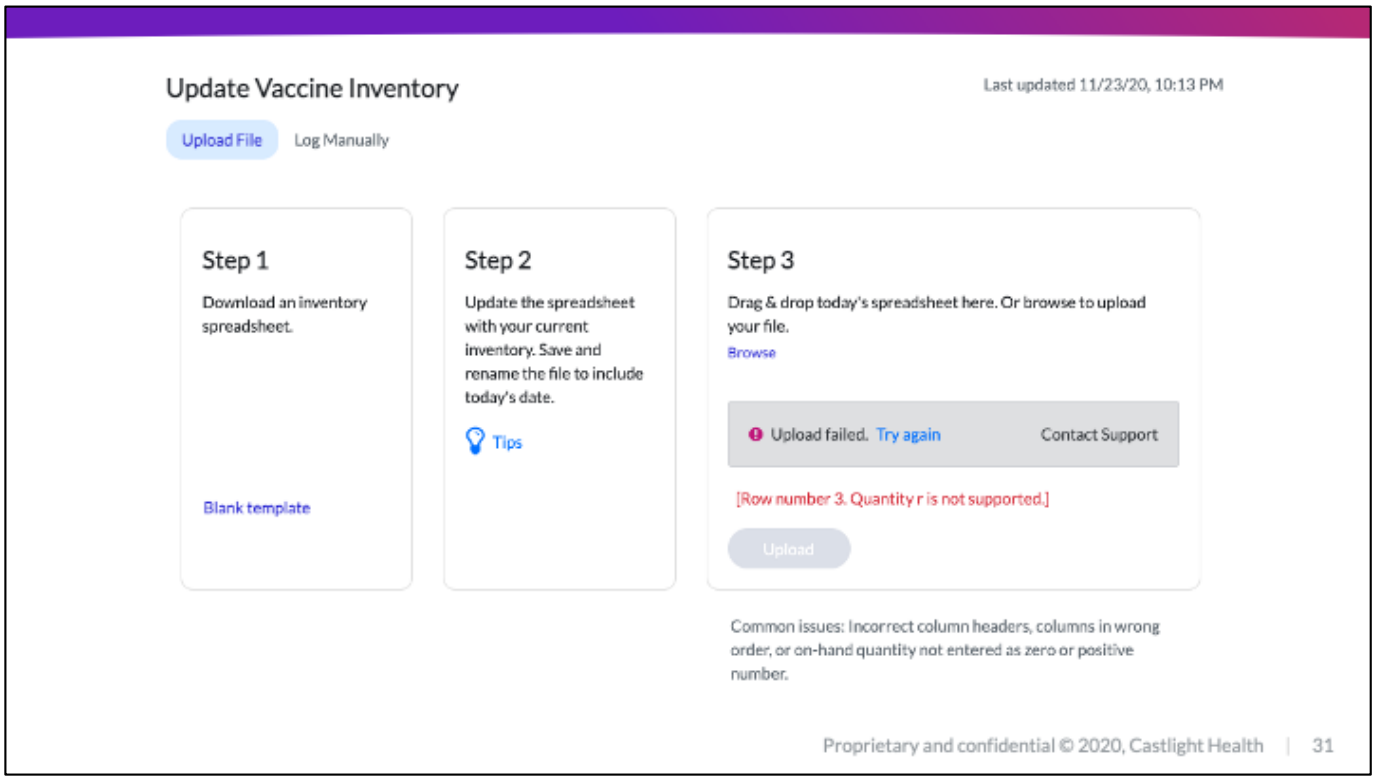


[8g. File Upload: Error Messaging]

- If there is an error in the file, the user will be shown an error screen. The error screen will report the row(s) where an error appeared in the file and a brief description of the error. The user will then be prompted to try again.
- Common errors that appear when updating inventory through the template include unsupported values for the quantity field. Acceptable values are:
    - <Enter Quantity Here>
    - 0 or any positive integer
    - Remove
    - Unknown
- If a user continues to have issues with uploading the file, they may reach out to our help desk through the information provided on the upload file screen.



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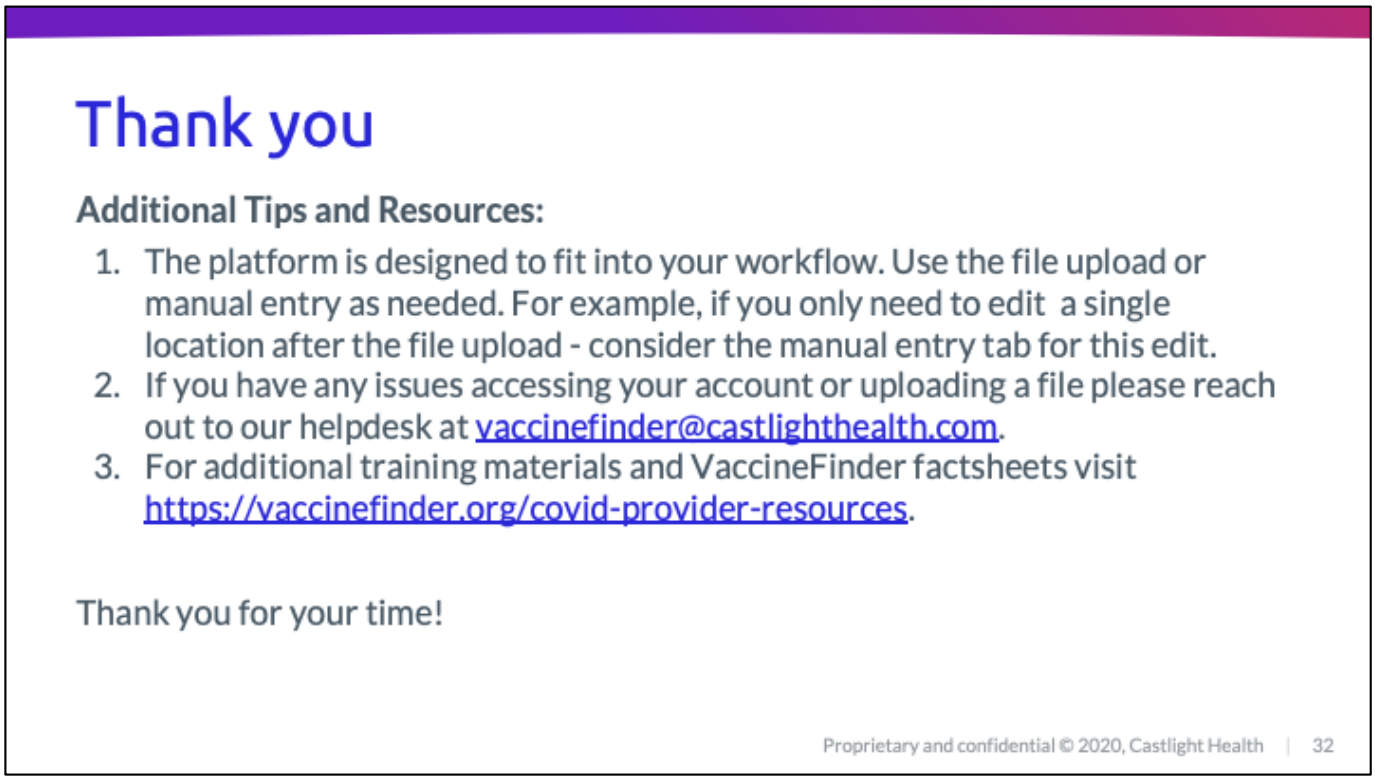
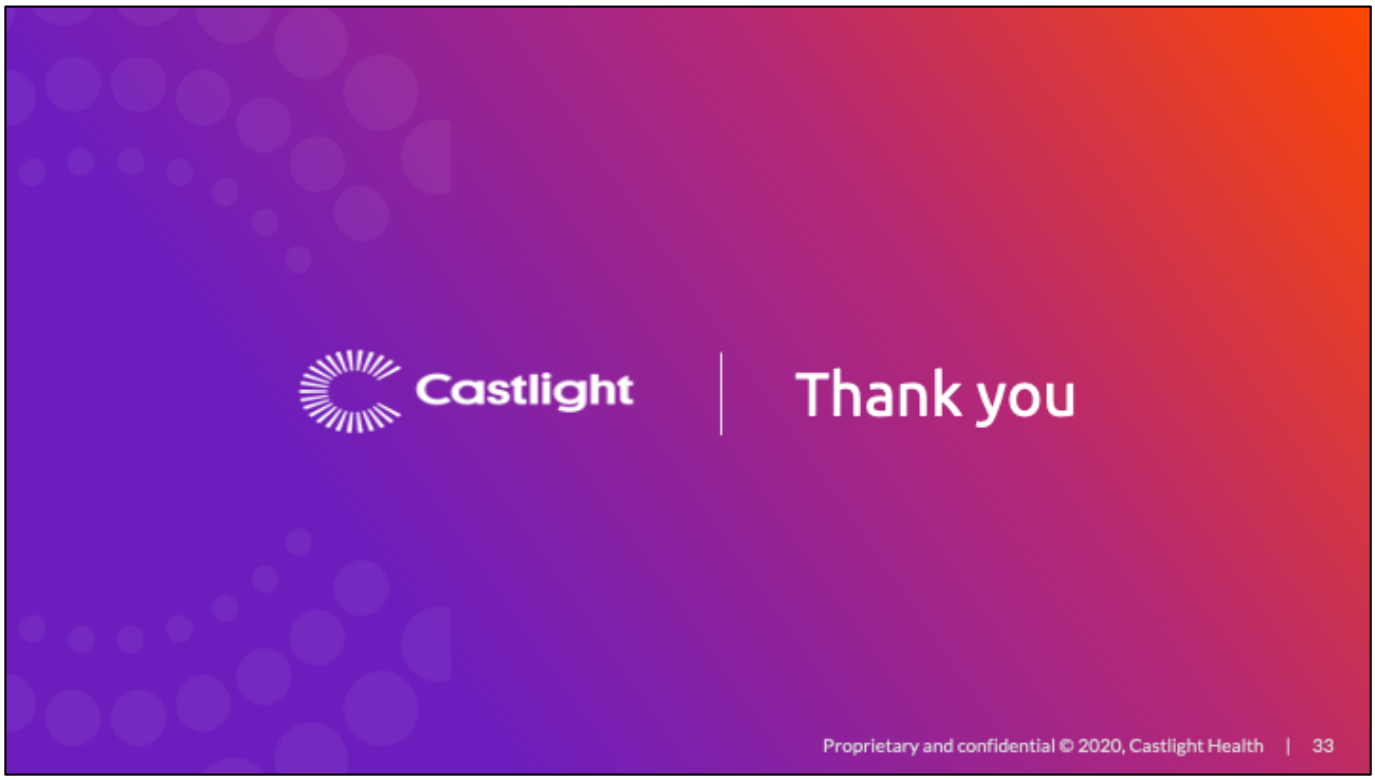


[9. Conclusion]
Thank you for your time during the presentation.

The platform is designed to fit into your workflow. Use the file upload or manual entry as needed. For example, if you only need to edit a single location after the file upload - consider the manual entry tab for this edit.

If you have any technical accessing your account or updating inventory, please reach out to **vaccinefinder@castlighthealth.com** for assistance.

There are additional resources available for VaccineFinder including factsheets and training documents can be found on the VaccineFinder.org website. Please visit **https://vaccinefinder.org/covid-provider-resources** for more information.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Thank you
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