VAMS
Vaccine Administration
Management System

User Manual

Clinic Administrator

Table of Contents

Introduction

Welcome to VAMS

The Vaccine Administration Management System (VAMS) is a secure, web-based tool built to help jurisdictions, vaccination clinics, organizations/employers, and vaccine recipients manage COVID-19 vaccination efforts. It supports operations and data collection and tracking to meet COVID-19 vaccination requirements.

VAMS Has Four Portals.

Each portal is designed for specific types of users.

Jurisdiction Portal

Jurisdictions can use VAMS to:
- Designate specific organizations/employers that serve critical infrastructure populations (including volunteers) and other priority risk groups.
- Identify at-risk populations that are a high priority for vaccination.
- Build a database of COVID-19 vaccination clinics in their jurisdiction.
- Access COVID-19 vaccine inventory and administration data for analysis and reporting.

Organization & Employer Portal

Organizations* **or employers** (referred to as "organizations" in this user manual) of critical infrastructure populations can use VAMS to:
- Add critical infrastructure workers and other at-risk groups to be considered for COVID-19 vaccination.
- Automatically send email notifications to those individuals to register in VAMS and schedule their vaccine appointment(s).

Recipient Portal

Vaccine recipients** can use VAMS to:
- Register as a vaccine recipient.
- Locate a clinic and schedule vaccination appointments.
- Schedule and track follow-up vaccination appointments (if applicable).
- Receive proof of vaccination.

Clinic Portal

Vaccination clinics*** (referred to as "clinics" in this user manual) can use VAMS to:
- Register the clinic.
- Check in recipients.
- Document and track COVID-19 vaccine administration and waste.
- Monitor vaccine inventory levels.

*"Organization" refers to any institution, association, company, or other group that will add critical infrastructure workers and other at-risk groups to VAMS to be considered for COVID-19 vaccination. "Employer" is one example of an organization.
**To use VAMS, vaccine recipients must have internet access, an email address, and the ability to navigate the system or have someone assist them.

***Vaccination clinics are often referred to as "vaccine clinics" in VAMS.

Your Role and Responsibilities

Your Role in VAMS is Critical to the Clinic's Success

As a **clinic administrator**, you use VAMS to define and manage your clinic's information, such as location and operating hours, add clinic staff as VAMS users, place and track inventory requests, log vaccine inventory and waste, monitor inventory levels, and communicate with your jurisdiction about inventory requests.

The table below illustrates the activities that only you, as the clinic administrator, can perform in VAMS.

Role	Clinic Administrator	Clinic Inventory Manager	Clinic Front Desk	Clinic Healthcare Professional
Serve as the clinic's point of contact for your jurisdiction	✓			
Set and manage clinic schedule	✓			
Manage clinic's vaccine inventory	✓	✓		
Add and manage VAMS users	✓			
Check in vaccine recipients			✓	
Create walk-in appointments and cancel recipient appointments			✓	
Administer vaccine to recipients				✓
View next-dose eligibility dates				✓

NOTE: Your clinic **must** have a clinic administrator, front desk, and healthcare professional to maintain clinic operations. Since the clinic administrator can manage inventory in VAMS, filling the inventory manager role is not required but is recommended.

How to Use this User Manual

| Component	Description
NOTE:	Notes are need-to-know pieces of information of which you should be aware.
Quick Tip:	Quick Tips are good-to-know pieces of information and tips for getting the most out of VAMS.
➢ Arrows	Items with arrow bullet points are action items (e.g., "click the button").
• Bullets	Items with circular bullet points provide information about steps in a process that don't require action (e.g., "a pop-up window will appear").
Bright blue hyperlinks	Bright blue hyperlinks link to external pages (e.g., https://vams.cdc.gov/vaccineportal/s).
Gray hyperlinks	Gray hyperlinks in the footer link to section dividers and this manual's table of contents (e.g., "Return to Table of Contents" links in the page footers).
Dark blue hyperlinks	Dark blue hyperlinks link to other pages in this manual (e.g., Step 1: Activate Your Account in VAMS).
Access Support	Buttons like the one pictured also link to other pages in this user manual.

Navigating VAMS

Quick Tip: VAMS works best in the Google Chrome browser but can be accessed via any browser except Internet Explorer. VAMS also works on mobile browsers.

To access VAMS, visit the landing page (https://vams.cdc.gov/vaccineportal/s) and log in with your user name and password.
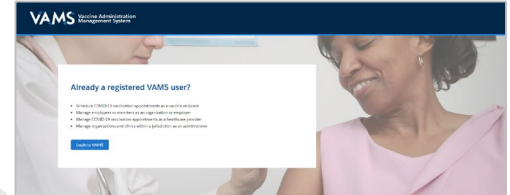
## The components listed below are in VAMS to help you navigate the system

Header/Banner
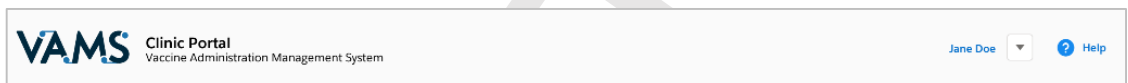
The **VAMS logo** takes you to your portal's home page. The **Help** link takes you to a list of frequently asked questions (FAQs) that will help you navigate the system. Click the drop-down arrow next to your name in the top right corner of the page to **log out** of the system.

Buttons

Buttons like those shown on the right allow you to start, advance, and complete tasks.
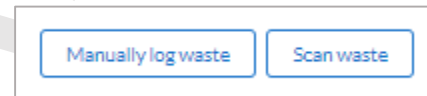
Tabs

Click tabs on a page to move between pages or page sections. The tab you are currently viewing will be underlined and bolded. Tabs not being viewed will be grayed out.

Tables

Tables allow users to sort or filter information previously entered in VAMS. You can view entry details by clicking the links on each row.

A Note About Privacy

To receive COVID-19 vaccine, vaccine recipients must enter data that are considered personally identifiable information (PII) and protected health information (PHI). PII is any data that could potentially identify a specific individual. PHI is information, including demographic information, that relates to the individual's past, present, or future physical or mental health or condition. VAMS complies with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For more information about HIPAA visit https://www.cdc.gov/phlp/publications/topic/hipaa.html.

Section 1

Four Steps to Set Up Your Clinic in VAMS

This checklist summarizes the four steps you will take to set up your clinic in VAMS. Once completed, your clinic will be active in the system, which means:

- Recipients will be able to schedule appointments at your clinic,
- Your front desk staff will be able to check in recipients,
- Your healthcare providers will be able to log vaccine administration, and
- You or your inventory manager will be able to place vaccine inventory requests.

Step	Information You Need to Complete this Step
❑ **Step 1: Activate Your User Account** to access VAMS. Follow the prompts in your registration email from vams@cdc.gov to complete this step.	• Access to the internet • Access to your email account • Registration email from **vams@cdc.gov**
❑ **Step 2: Register Your Clinic in VAMS** (clinic POC only). If you are the clinic's point of contact (POC) for your jurisdiction, your registration link will prompt you to register your clinic in VAMS. Other administrators at your clinic will not perform this step.	• Clinic name • Clinic type (types defined on page 7) • Primary address • Shipping address • Phone number • Your email address
❑ **Step 3: Set Up Your Clinic's Schedule in VAMS.** This step includes selecting an appointment duration time, setting clinic operating hours, and adding vaccination stations.	• Selected appointment duration at your clinic (10, 15, 20, or 30 minutes) • Desired clinic operating hours (days and hours your clinic will be open) • Number of vaccination stations your clinic will staff • Operating hours for each vaccination station (hours each station will be staffed on each day) **NOTE:** You must set up at least one station to make appointments available.
❑ **Step 4: Add Clinic Staff as VAMS Users** so your clinic staff receives a registration email to create their own VAMS account.	• Familiarity with the VAMS Roles and Activity Matrix on page 15 (roles in VAMS include clinic administrator, healthcare professional, front desk, and inventory manager). • Email address for each user you plan to add

❑ Step 1: Activate Your User Account

What you'll need to complete this step

- Access to the internet
- Access to your email account
- Registration email from **vams@cdc.gov**

You must activate an account in VAMS to use the system. After your jurisdiction's POC enters your name and email address in VAMS, you will get an email with a link to create an account in VAMS.

➤ Search your inbox for an email from **vams@cdc.gov.**

  Quick Tip: If this email is not in your inbox, you may need to check your junk or spam mail folders. If you still cannot find the email, contact your jurisdiction's POC.

➤ Click the **registration link** in the email. This takes you to the account creation page in VAMS.

  NOTE: The registration link in your email is for your registration only and cannot be used to register anyone else. Please do not forward it to anyone as the link will not work for them.
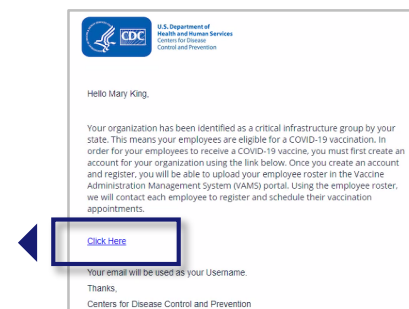
➤ **Verify your email address** (the email address where you received the original VAMS invitation will be prepopulated). Your email address will be your **user name** when logging in to VAMS.

➤ Create and verify your **password**.

➤ Check your email account for a **verification code** that will be sent to you immediately after clicking the registration link in your email from vams@cdc.gov. **Enter the verification code**.

➤ Read the **terms and conditions** and check the box saying you agree.

➤ Click **Create Account**.

NOTE: Every time you log into VAMS you must verify your identity through a two-factor authentication process. After five log-in attempt failures, you will be locked out of the system for one hour.

Upon logging into VAMS, you will be taken to the Vaccination Clinic Registration page, where you will follow the instructions in Step 2: Register Your Clinic in VAMS.

❑ **Step 2: Register Your Clinic** *(Clinic POC only)*

What you'll need to complete this step

- **Clinic name**
- **Clinic type***
- **Primary address**
- **Shipping address**
- **Phone number**
- **Your email address**

***Clinic Types**

Clinic: Healthcare setting providing outpatient care with one permanent location for vaccination
- Can receive inventory at permanent location or at an alternate shipping location
- Examples include urgent care centers, retail clinics, federally qualified health centers, etc.

Hospital: Healthcare setting providing inpatient and/or outpatient care with one permanent location for vaccination
- Can receive inventory at permanent location or at an alternate shipping location
- Examples include for-profit community hospitals, Veterans Affairs medical centers, nongovernment not-for-profit community hospitals, etc.

Pharmacy: Clinic with one permanent location for vaccination
- Can receive inventory at permanent location or at an alternate shipping location
- Examples include retail pharmacies, community pharmacies, clinical pharmacies, etc.

Other: Select "other" if your clinic doesn't fall within one of the categories above and you would like to label it differently.

Pop-up: Clinic with a temporary location for vaccination
- Requires permanent address to receive inventory
- Examples include temporary vaccination sites at workplaces, schools, government facilities, etc.

Mobile: Clinic with multiple locations for vaccination
- Can change physical address for vaccinations
- Requires permanent address to receive inventory
- Examples include mobile clinic bus, mobile clinic van, etc.

Third-party: Clinics in a setting such as a long-term care facility (LTCF) or correctional facility that will be responsible for administering vaccine to recipients
- Can receive inventory at permanent location or at an alternate shipping location
- Recipients do not use VAMS
- Responsible for uploading list of recipients, administering the vaccine as part of normal course of care, and documenting when the vaccine is administered
- Not searchable by other VAMS users

❏ **Step 2: Register Your Clinic**
(Clinic POC only, continued)

➢ On the Point of Contact page, **confirm your information is correct.** If not, make the necessary edits, then click **Next**.

  Note the fields marked with a red asterisk (*) are required.

➢ On the Clinic Information page, **confirm your clinic's information is correct**. If not, make the necessary edits, then click **Next**.

  NOTES about vaccination clinic information:

  • If the incorrect clinic type was selected, you may edit it by clicking the drop-down arrow in that field.

  • **Physical and Shipping Addresses**:

    o The clinic's shipping address can be different from the physical address if you prefer vaccine to be shipped to another location.

    o Mobile clinics must have a permanent shipping address for inventory but can change their physical address. If you work for a mobile clinic, see Mobile Clinic Locations and Operating Hours in Section 3 for more information on how to add additional locations after you've completed your mobile clinic's registration.

➢ Review all information. If it is correct, **check the box** at the bottom left side of the screen, then click **Finish**. If you want to make edits, click **Previous**.

CONGRATULATIONS!
Your clinic is now active in VAMS!

➢ Click the **Access Clinic Portal** button, then click the **Clinic Details** tab to begin Step 3: Set Up Your Clinic's Schedule in VAMS.

  NOTE: After registering your clinic in VAMS, it shows as "active" to your jurisdiction POC in the system. However, it is **not visible to recipients** until the operating hours and clinic vaccination station(s) are set up in VAMS.

❑ Step 3: Set Up Your Clinic's Schedule

What you'll need to complete this step

- Selected appointment duration at your clinic (10, 15, 20, or 30 minutes)
- Clinic operating hours (hours and days will your clinic will be open)
- Number of vaccination stations the clinic will staff
- Operating hours for each vaccination station (hours each station will be staffed on each day)
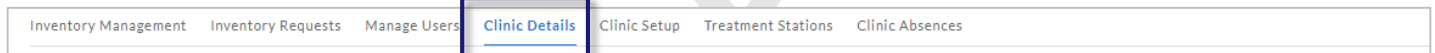
To set up your clinic's schedule, you will:

1. Set appointment duration
2. Set operating hours for your clinic
3. Add vaccination station(s) and set their operating hours

1. Set Appointment Duration
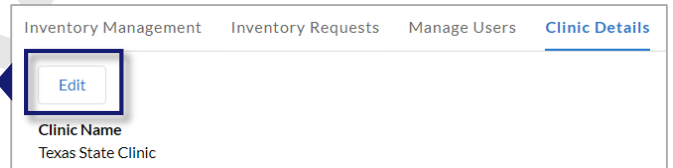
You can set the duration of appointments for your clinic in VAMS for 10, 15, 20, or 30 minutes.

➢ To select an appointment duration for your clinic, click the **Clinic Details** tab.

➢ Click the **Edit** button located at the top left of the clinic details page.
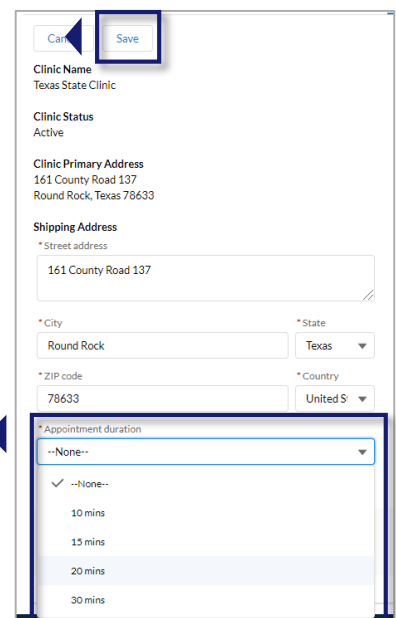
➢ **Select an appointment duration** from the drop-down menu, then click **Save** at the top of the page. This will set the appointment duration for all vaccination stations you add in VAMS.

☐ **Step 3: Set Up Your Clinic's Schedule** *(continued)*

2. Set Operating Hours for Your Clinic

You will follow this process to add hours for each day your clinic is open. VAMS allows you to customize operating hours with the option to have one or multiple time slots per day. For example, if you would like your clinic's operating hours on Monday to be 9 am–12 pm and 2 pm–5 pm, you can add two time slots for Monday. You will set up appointment time slots for your clinic's vaccination stations in the next step.

➢ To set operating hours for your clinic, click the **Clinic Setup** tab.

➢ Click your **clinic's name** in the Clinic Locations table to go to the **clinic location details** page.

➢ Click the **Setup Operating Name and Operation Hours** link located under Clinic Operating Hours at the bottom of the page.

NOTE: The **Available for Scheduling?** checkbox will automatically be checked. If your clinic is not ready to open for appointments, uncheck that box by clicking the **Edit** button located at the top right of the page. When you are ready to start scheduling appointments, click Edit again and check the box.

☐ Step 3: Set Up Your Clinic's Schedule *(continued)*

b. Set Operating Hours for Your Clinic *(continued)*

➢ First, **name your clinic's operating hours** by clicking the **pencil icon** to the right of the Operating Hours Name field. **Type a name** for your clinic's operating hours, then click **Save**.

Quick Tip: Consider using a standard naming convention for your clinic's operating hours.

➢ Next, click the **Operating Hours** tab to add clinic operating time slots for the hours your clinic will be open each day.

➢ On the operating hours page, in the Clinic Operating Time Slots table, click **New**.

➢ In the pop-up window, select the **day of the week** and a **start and end time** for the time slot you are adding.

➢ Once you have made your selections, click **Save**.

➢ If you want to add another time slot for the same day or for other days, click **Save & New.** This will save your time slot and open a new pop-up window for you to add another time slot.

➢ **Continue this process** until all time slots are set for each day your clinic is open.

➢ To **rename clinic operating hours**, or **edit or delete time slots in the operating hours**, see Manage Clinic Schedule on in Section 3.

❑ **Step 3: Set Up Your Clinic's Schedule** *(continued)*

3. Add Vaccination Station(s) and Set Their Operating Hours

Now, you will set up the appointment slots that will be available at your clinic.
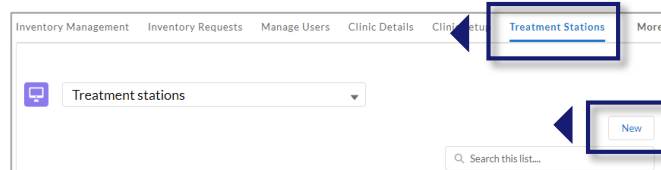
NOTES about vaccination stations:

- Currently, **vaccination stations are called "treatment stations" in VAMS**. The instructions listed below will use the term "treatment stations" to align with what you see in VAMS.
- You will **create a treatment station in VAMS for each vaccination station** in your clinic. No appointments will show as available to recipients until you set up at least one treatment station.
- The number of **treatment stations and their operating hours affect appointment availability at your clinic**. *For example:*
    - *Scenario 1:* You have **one** treatment station whose operating hours are 8 am–5 pm on Tuesday, with an appointment duration of 20 minutes. This means a total of 24 appointment time slots will be available.
    - *Scenario 2:* You have **two** treatment stations with the same operating hours and appointment duration. This means a total of 48 appointment time slots will be available.
        - ❖ In the first scenario, if a recipient schedules an appointment for 2 pm on Tuesday, they have taken the only time slot available at 2 pm because there is only one treatment station open at that time. This means no other recipient can select the 2 pm time slot for that day.
        - ❖ In the second scenario, the 2 pm time slot on Tuesday will be available for two recipients since there are two treatment stations operating from 8 am–5 pm that day.
- **You can set unique operating hours for each treatment station OR,** once you have created operating hours for one treatment station, you can select and use those same operating hours for other treatment stations.

Create Vaccination Station(s)

➢ To create a treatment station in VAMS, click the **Treatment Stations** tab.

➢ Click the **New** button.

➢ In the pop-up window that appears, select your clinic's name in the Clinic field.

➢ **Name** the treatment station you are creating.

   Quick Tip: Consider giving each treatment station a name that aligns with how they are marked in the clinic or how they will be referenced by healthcare professionals (e.g., Station A or Station 1).

➢ Select the **start** and **end dates** (i.e., the dates you want this station to be available for recipient appointments) for your treatment station.

☐ Step 3: Set Up Your Clinic's Schedule *(continued)*

c. Add Vaccination Station(s) and Set Their Operating Hours *(continued)*

➤ For the first treatment station you create, select **New Station Operating Hours** in the Station Operating Hours field. If you create multiple treatment stations, you will be able to select new station operating hours for each station or you can select the same operating hours you created for other stations.

➤ **Name** the set of operating hours for this treatment station and click **Save**.

Quick Tip: Consider using a standard naming convention for your stations' operating hours (e.g., Station A Monday Hours).

➤ Once you've entered the required information for your treatment station, click **Save** and you will be taken to that **treatment station's details page** to set its operating hours.

Set Vaccination Station Operating Hours

To set operating hours for a vaccination station, follow the same process you used to set the clinic's operating hours.

➤ From the treatment station's details page, click the name of the operating hours for the treatment station.

➤ Click the **Station Operating Hours** tab.

➤ On the **Station Operating Hours** page, in the Treatment Stations table, click **New**.

➤ In the pop-up window, select the **day of the week** and a **start and end time** for the time slot you are adding.

➤ Once you have made your selections, you can click **Save.** If you want to add another time slot for the same day or for other days, click **Save & New.** This will save your time slot and open a new pop-up window for you to add another time slot.

NOTE: You can add as many treatment stations in VAMS as you need. They can all have the same operating hours you created for one treatment station or each station can have their own operating hours.

➤ To **rename treatment station hours**, or to **edit or delete a time slot in a treatment station's operating hours**, see Manage Clinic Schedule on in Section 3.

❑ Step 4: Add Clinic Staff as VAMS Users

What you'll need to complete this step

- Familiarity with the VAMS Roles and Activity Matrix on the next page. Roles in VAMS include clinic administrator, healthcare professional, front desk, and inventory manager.

- Email address for each user you plan to add

NOTE: Your clinic **must** have a clinic administrator, front desk, and healthcare professional to maintain clinic operations. Since the clinic administrator can manage inventory, filling the inventory manager role is not required but is recommended.

Add clinic staff as VAMS users to give them access to perform their role in the system.

As shown on page 3, the four VAMS clinic user roles should generally align with each user's existing scope of responsibility at the clinic (e.g., the front desk user role has access in VAMS to perform the activities of a front desk employee, including recipient check-in and appointment management).

However, as the clinic administrator, you can assign multiple user roles to one user, giving them access to perform additional tasks in VAMS.

For example, a healthcare professional at your clinic should be assigned a healthcare professional role in VAMS. You can also assign the front desk role to that healthcare professional user so they have access in VAMS to check in recipients or create appointments.

NOTE: Prior to assigning multiple roles to clinic staff, **it is important to be familiar with the VAMS Roles and Activity Matrix** on the next page, which provides a detailed description of the access each user has based on their role(s) in VAMS.

The healthcare professional role must be assigned only to healthcare professionals because they have access to view recipient personally identifiable information (PII). Assigning a healthcare professional role in VAMS to a non-healthcare professional is **strictly prohibited.**

# ☐ **Step 4: Add Clinic Staff as VAMS Users**
(continued)

VAMS Roles and Activity Matrix				
Activity in VAMS	**Clinic User Role**			
	Clinic Administrator	**Inventory Manager**	**Healthcare Professional**	**Front Desk**
Serve as a clinic point of contact for your jurisdiction	✓			
Manage clinic information (e.g., physical address, operating hours)	✓			
Set and manage clinic schedule	✓			
Manage (add, edit, remove) VAMS users	✓			
Submit inventory requests	✓	✓		
Log vaccine inventory when received	✓	✓		
Log vaccine waste	✓	✓		
Monitor clinic vaccine inventory levels to match appointments scheduled	✓	✓		
Check in vaccine recipients				✓
Create recipient appointments				✓
Cancel recipient appointments			✓	✓
Confirm recipient Identity			✓	✓
View recipient medical history and personal information; add notes to record			✓	
Log vaccine administration			✓	
Administer vaccine to recipients			✓	
Log vaccine waste that occurred during administration (if applicable)			✓	
View next-dose eligibility dates			✓	

# ☐ Step 4: Add Clinic Staff as VAMS Users
(continued)

➢ To add clinic staff as VAMS users, click the **Manage Users** tab on the Clinic Portal home page.

➢ Click the **New** button in the top right corner of the Clinic Users table.
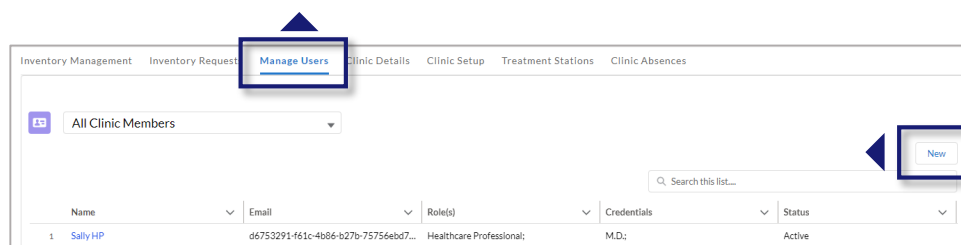
➢ In the **Add or Update User** pop-up window, enter the user's **email** and click **Search**.

> **NOTE:** This feature searches to see if the user's email address has been used to create an account in VAMS. For detailed information about adding clinic staff members who are already VAMS users for other clinics, see Multi-Clinic Users on in Section 3.
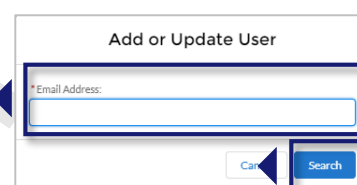
➢ In the next pop-up window, enter the user's **information** and **select the role(s)** you want them to perform in VAMS.

> **NOTE:** Prior to adding additional roles to a user's record in VAMS, refer to the Activities Matrix on the previous page for clarity on each role's access in the system.

➢ Click **Save**.

• After you click Save, a registration email will automatically be sent to the user with a registration link to set up their account in VAMS.

CONGRATULATIONS!

You have completed all four steps to set up your clinic in VAMS. The next two sections will provide guidance on how to perform additional tasks in VAMS.

Section 2

Everyday Clinic Administration Tasks in VAMS

Now that you have completed the four steps to set up your clinic in VAMS, you can use the system to manage daily clinic administration tasks such as those listed below.

The boxes below are clickable links to the appropriate pages in this user manual.

Clinic Operations

Manage Clinic Details	Manage clinic address(es), clinic type, and clinic appointment duration, deactivate your clinic, check or uncheck the **Available for scheduling?** box to make your clinic available or unavailable for recipients to schedule appointments in VAMS, add clinic start or end dates.
Manage Clinic Schedule	Change operating hours or appointment duration, add or remove vaccination stations, create clinic and station absences.
Manage Clinic Users	Edit a user record, remove a VAMS user, or add a multi-clinic user.

Clinic Inventory

Place COVID-19 Vaccine Inventory Request	The clinic administrator and/or inventory manager can submit inventory requests to your clinic's jurisdiction.
Track COVID-19 Vaccine Inventory Request	Track inventory requests and communicate with jurisdiction POCs about them.
Log COVID-19 Vaccine Inventory	Log vaccine inventory manually or via 2D barcode scanner (if available).
Log COVID-19 Vaccine Waste	Log vaccine waste manually or via 2D barcode scanner (if available).
Monitor COVID-19 Vaccine Inventory Levels	Use the Inventory Management page to monitor inventory levels and view snapshots of available and booked appointments.

VAMS Support

Access Support	Know how to find answers to frequently asked questions about VAMS.

Manage Clinic Details

Manage clinic address(es), clinic type, or clinic appointment duration, deactivate your clinic, check or uncheck the **Available for scheduling?** box to make your clinic available or unavailable for recipients to schedule appointments, and add clinic start or end dates.

There are two ways to edit your clinic information: through the **Clinic Details** tab and through the **Clinic Setup** tab. Each method offers different editing options.

Clinic Details Tab

➢ Click the **Clinic Details** tab, then click the **Edit** button above your clinic's name.

- Here you can:
  - Update your shipping address for inventory.
  - Change duration of clinic appointments.
  - Deactivate your clinic (see Deactivate Your Clinic in Section 3 for more information).

Clinic Setup Tab

➢ Click the **Clinic Setup** tab, then click your **clinic's name** in the Clinic Location table.

➢ Click the **Edit** button in the upper right corner of the **Clinic Location** page.

- Here you can:
  - Update your clinic's physical address.
  - Check or uncheck the **Available for scheduling?** box to make your clinic available or unavailable for recipients to schedule appointments.
  - Change your clinic's start or end dates.
  - Change your clinic type. **NOTE:** To change your clinic's type, do not click the Edit button in the upper right corner. Instead, click your clinic's name in the Clinic Location page. Then click the pencil icon in the Clinic Type field.

👤 Manage Clinic Schedule

Change clinic operating hours or appointment duration; edit, add, or remove vaccination stations and/or their operating hours; create clinic and station absences.

NOTE: Editing or deleting the clinic's operating hours will impact recipient appointments scheduled during those times. Once you click Save, a pop-up window will appear alerting you that editing or deleting the time slots will cancel appointments scheduled during that time. Deleting or editing operating hours will also impact the number of time slots available for recipients who want to schedule an appointment at your clinic.

Edit or Delete Clinic Operating Hour Time Slots

You can edit or delete time slots in your clinic operating hours from the **Clinic Setup** page.

➢ Click your **clinic name** in the Clinic Locations table.

➢ Click the **name of your clinic hours** in the Clinic Operating Hours field.

➢ On the next screen, click the **Operating Hours** tab.

➢ Click the **Slot #** of the time slot you want to edit or delete and then click the edit or delete button at the top right corner of the page.

➢ In the pop-up window, edit the hours and click **Save**.

Manage Clinic Schedule *(continued)*

NOTE: Making edits to or deleting your clinic's treatment stations will impact recipient appointments scheduled during those treatment stations' operating hours. Once you click Save, a pop-up window will appear alerting you that editing or deleting treatment stations will cancel appointments scheduled during those treatment stations' operating hours. Deleting or editing operating hours will also impact the number of time slots available for recipients who want to schedule an appointment at your clinic.

Edit or Delete Treatment Stations

You can edit details or delete treatment stations from the **Treatment Stations** page.

- ➤ Click the treatment station in the Treatment Stations table.

- ➤ Click the **Edit** or **Delete** button in the upper right corner of the screen.
- ➤ Make the desired edits, then click **Save**. Or click **Delete** if you want to delete that treatment station.

- ➤ As mentioned above, after you click Save or Delete, a pop-up window will appear with a warning that the update will cancel appointments scheduled during that treatment station's operating hours.

Manage Clinic Schedule *(continued)*

Rename, Edit, or Delete Treatment Station Operating Hours and Time Slots

Click the **Treatment Stations** tab for a list of your treatment stations.

To **rename a treatment station's operating hours:**

➢ Click on the treatment station.

➢ Click the **name** of the operating hours on the Station Details page.

➢ Click the **pencil icon** to rename the treatment station's operating hours, edit the name, then click **Save**.

To **edit or delete a treatment station's operating hours**:

➢ Click the **Station Operation Hours** tab.

➢ Click the **Slot #** for the time slot you want to edit.

➢ Click **Edit** or **Delete** in the upper right corner of the time slots page.

➢ Make your edits or delete the time slot, then click **Save**.

Manage Clinic Schedule *(continued)*

Create a Clinic Absence

If you need to temporarily close your clinic, you can create a clinic absence to **put a temporary pause on your normally scheduled operating hours**. During a clinic absence, the system will show your clinic as closed and appointments will not be available to recipients.

NOTE: If you create a clinic absence during a time when recipients have already scheduled appointments, the appointments will be cancelled, and recipients will receive a cancellation notification via their preferred communication method.

- ➢ Click the **Clinic Absences** tab to create an absence.
- ➢ Click the **New** button in the upper right corner.

- ➢ In the pop-up window that appears, select your clinic's name in the Clinic field.
- ➢ Create a **name** and **reason** for the absence.
- ➢ Select **start/end dates**.
- ➢ Click **Save**.

- • All clinic absences will appear in the Clinic Absences table. Here you can **edit or delete** them by clicking the clinic name, then clicking Edit or Delete in the upper right corner.

  NOTE: Updates to the clinic schedule may not immediately appear in the recipient portal where recipients search for clinics and schedule appointments.

For example: If you edit the clinic's operating hours on Monday morning to show that the clinic is closed on Friday, recipients may not see updated clinic hours until late Monday evening or Tuesday morning.

Manage Clinic Schedule *(continued)*

Create a Vaccination Station Absence

In addition to a clinic absence, you can **create a treatment station absence** if you need to temporarily shut down one of the stations because of insufficient staff or inventory. **If you create a clinic absence, you do not have to create treatment station absences for the same time period.** The clinic absence will override any operating hours associated with the treatment stations.

➢ To create a **vaccination station absence**, click the **Treatment Station** tab to view a list of the stations you have created**.**

➢ Click the **station name** in the Treatment Stations table to access that station's details and absences.

➢ Click the **Station Absences** tab.

➢ Click **New** in the Station Absences box.

➢ Click in the **Station** box in the pop-up window. Your station's name should appear in the drop-down for you to select or you can search for it if it doesn't appear.

➢ Add a reason for the absence, start date and time, and end date and time, and click **Save**.

➢ A warning will pop up that updating the treatment station absence will cancel scheduled appointments. Click **Ok.**

• All treatment station absences will appear in the Station Absences table under the **Station Absences** tab for each treatment station. Here you can **edit or delete** them through the drop-down arrow to the right of an absence's details.

Manage VAMS Clinic Users

Edit a user record, remove a VAMS user, or add a multi-clinic user.

Edit or Remove a VAMS Clinic User

You can edit a VAMS user's record or remove them from the system on the **Manage Users** page.

➢ To **edit a user's information**, click the **user's name** in the Clinic Members table.

➢ On the user's information page, you can **edit** the user's details by clicking the **Edit** button in the upper right corner or **remove** the user by clicking the **Remove** button.

➢ If you edit the user's record, click **Save**.

If you click the Remove user button, another pop-up window will appear and ask you to confirm that you want to remove the user.

➢ Answer **Yes** or **No** and click **Next**.

Manage VAMS Clinic Users *(continued)*

Multi-Clinic Users: Add a clinic user who is already a registered VAMS user

You can add a user to your clinic who is already a registered VAMS user at another clinic. The system will recognize the user through their email address.

➢ In the **Add or Update User** pop-up window, enter the user's **email** and click **Search**.

>   **NOTE:** This feature searches to see if the user's email address has been used to create an account in VAMS.

- In this example, the healthcare professional (HP) user added to the clinic is already a VAMS user. You will know this because the HP's first and last name is populated in those fields, and roles are already selected for them.

- **The roles they are assigned by another clinic's administrator carry over to your clinic**. Similarly, roles you select for them will carry over to any other clinic for which they are a VAMS user.

   For example: If you select the front desk role for your new HP, they will also have that role at all other clinics for which they work. Similarly, if you remove the inventory manager role from this HP, they will no longer have that role at any other clinic for which they work.

- After you add them as a user in your clinic, they will receive an **email notification** from vams@cdc.gov that they are identified as a user for your clinic, with a link for them to log into the VAMS portal.

- After logging in and accessing the **Clinic Portal**, they will see all clinics they are linked to in VAMS, including yours.

Place COVID-19 Vaccine Inventory Requests

What you'll need to place inventory requests

• Desired product type, number of doses

Managing your clinic's vaccine inventory will primarily be the inventory manager's role, but as the clinic administrator you also have access to manage vaccine inventory in VAMS . You will submit your COVID-19 vaccine inventory requests in VAMS to your jurisdiction's POC. This crucial process will allow you to ensure your clinic has enough inventory on hand to administer vaccines to the recipients with scheduled appointments.

While you will place all inventory requests in VAMS, the jurisdiction POC will place all COVID-19 vaccine orders outside of VAMS through an established process determined by the jurisdiction.

NOTE: Inventory requests let your jurisdiction know how much inventory you need. An inventory request does not place an order or guarantee you will receive all inventory requested right away. The jurisdiction will place an order through their public health agency for the amount of inventory they can accommodate.

You can place, view, and manage your inventory requests on the **Inventory Requests** page in VAMS.

The Inventory Requests page shows you a list of all inventory requests you've submitted. This list includes a system-generated **inventory request number**, **clinic name**, **product type** (vaccine type) requested, **date requested** and **required**, number of **doses requested**, and **status** of the inventory request.

➢ From the Clinic Portal home page, click the **Inventory Requests** tab.

Inventory Management	Inventory Requests						
COVID-19 inventory requests ▼							New
3 items • Sorted by Inventory Request Number • Filtered by all site inventory requests • Updated 2 minutes ago					Search this list...		
	Inventory Reque... ↑ ∨	Clinic ∨	Product ∨	Date Requested ∨	Date Required By ∨	Doses Requested ∨	Status ∨
1	IRN-0009	Dignity Health - California Hospital Medical Center	COVID-B	8/10/2020	8/12/2020	10	Submitted ▼
2	IRN-0010	Dignity Health - California Hospital Medical Center	COVID-A1	8/10/2020	8/12/2020	10	Submitted ▼

➢ Click the **New** button in the upper right corner of the Inventory Requests table.

🧑 Place COVID-19 Vaccine Inventory Requests *(continued)*

The **New Site Inventory Request** pop-up window includes several required fields (noted by a red asterisk).

➢ Click in the **Product** field and start typing the kind of vaccine product you want to order (e.g., COVID). Press **enter** or click the **magnifying glass** icon.

➢ In the **Vaccine Results** pop-up window, **click the number** in the Vaccine Name column of the table to select the vaccine product you want to request.

➢ After selecting the vaccine product, it will populate in the New Site Inventory Request pop-up window.

➢ Enter the **number of vaccine doses** you are requesting.

➢ Click in the **Clinic** field and your clinic's name will appear for selection.

➢ Enter the **date** of your inventory **request**.

➢ Enter the **date** by which you **need to receive** the vaccines you are requesting.

➢ Click **Save** to save your inventory request. VAMS will send your request to your Jurisdiction POC.

Create Site Inventory Request

* Product	* Date Requested
Search Vaccines... 🔍	📅
* Doses Requested	* Date Required By
	📅
* Clinic	
📇 MinuteClinic ✕	
* Status	
Submitted ▼	

Cancel   Save

Product

Product: COVID 🔍

Vaccines
4 Results • Sorted by Relevance ▼

VACCINE NAME	MANUFACTURER	PRODUCT	UOS NDC NUMBER	UOU NDC NUMBER	NUMBER OF DOSES IN UOU
VID-00000003	Merck	COVID-B	4615871606	4615871616	2
VID-00000002	Sanofi-Pasteur	COVID-A1	4928158905	4928158915	2

Cancel

Create Site Inventory Request

* Product	* Date Requested
Search Vaccines... 🔍	📅
* Doses Requested	* Date Required By
	📅
* Clinic	
📇 MinuteClinic ✕	
* Status	
Submitted ▼	

Cancel   Save

Track COVID-19 Vaccine Inventory Requests

After your inventory request is submitted, a record of that request appears on the **Inventory Requests** page. The inventory request record shows important details about the request. It also offers a way to monitor and communicate with the jurisdiction POC.

➢ Click the **Inventory Request Number** link in the list to access the inventory request record.

From the inventory request record, you can:

View Inventory Request details.
This section of the record has details about the inventory request.

Communicate with the jurisdiction POC.
Send the jurisdiction POC a message by typing in the **Post** box and clicking **Share.**

Monitor or follow comments made to your posts.
Like you would on a social media platform, click the **Follow** button to receive email notifications when the jurisdiction POC responds to a post you make in the inventory request record. You will **not** receive notifications for new posts.

In this example…

❖ "State User 2" **types** a message in the **Post** box about their ability to fulfill only half of the inventory request and **shares** it with "Mike Inventory Mgr."

❖ "Mike Inventory Mgr." **responds** to "State User 2's" post by writing in the comment bar found under each post.

❖ If "State User 2" clicks the **Follow** button, they will receive an email notification alerting them that "Mike Inventory Manager" has responded to their post.

Log COVID-19 Vaccine Inventory

Log vaccine inventory manually or via 2D barcode scanner (if available).

When you receive a COVID-19 vaccine delivery, you can log it in VAMS in one of **two ways:**

- Use a 2D barcode scanner to scan the barcodes on the vaccine vials. This automatically enters the information in VAMS.
- Manually enter the information.

   NOTE: VAMS is compatible with 2D barcode scanners (Bluetooth wireless and those that are not wireless). However, integrated mobile device scanning (i.e., an app that can scan a 2D barcode) will not connect with or transfer information to VAMS.

Notes about barcode types:
- Unit of use, or UoU, is the vaccine vial.
- Unit of sale, or UoS, is the packaging in which the vaccine vials are delivered.

   Example: One box, or UoS, could contain 10 UoUs or vaccine vials.

Log Vaccine Inventory by Scanning a 2D Barcode

NOTE: You **must** scan and log each UoS **individually**. Each UoS contains multiple vials or UoUs. When logging inventory, you must scan one UoU from each UoS. See the step-by-step instructions below.

➢ On the Clinic Portal home page, below the doses section of the Inventory Management page, click **Scan Inventory**.

➢ When the Scan Inventory pop-up appears, **scan the UoS barcode** on the vial with your 2D barcode scanner. The barcode will appear in the UoS barcode field.

➢ Select the vaccine **manufacturer** from the drop-down menu, then click **Next**.

➢ The UoS Information screen will appear with prepopulated UoS information. **Enter** the Total UoU (vials) in UoS, then click **Next**.

➢ **Scan** the UoU barcode on one of the vials from the UoS you are logging and it will appear in the UoU barcode field. Click **Next**.

➢ **Review** and confirm the information you entered is correct, then click **Next**.

➢ Click **Finish** in the pop-up window.

Log COVID-19 Vaccine Inventory *(continued)*

Log Vaccine Inventory Manually

➢ On the Inventory Management page, click the **Manually Log Inventory** button.

➢ Select the **manufacturer** and **product** from the drop-down menus. Enter the remaining **vaccine information** required.

➢ Click **Next**.

➢ **Review and confirm** the information you entered is correct, then click **Next**.

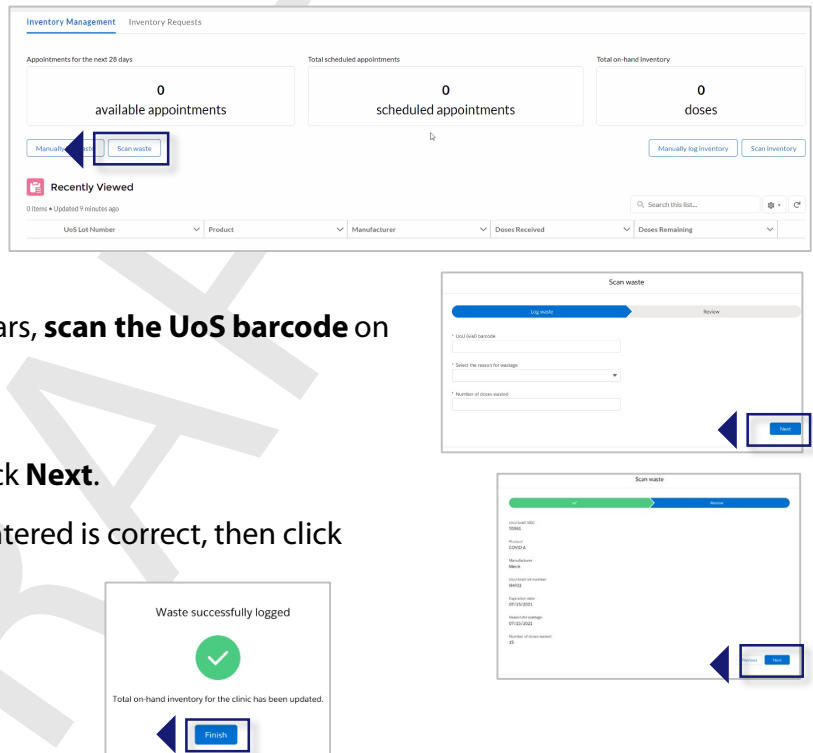➢ Click **Finish** in the pop-up window.

Log COVID-19 Vaccine Waste

Log vaccine waste manually or via 2D barcode scanner (if available).

Similar to how you log vaccine inventory, you can log vaccine waste in VAMS in **two different ways:** Use a 2D barcode scanner to scan the barcodes on the vaccine vials so the information is automatically entered in the system, or manually enter the information. First, we'll learn how to log vaccine waste by scanning a 2D barcode.

Log Vaccine Waste by Scanning a 2D Barcode
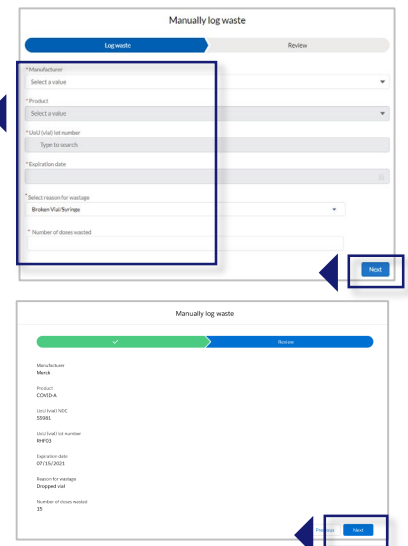
➢ On the Inventory Management page below the available appointments data, click the **Scan Waste** button.

➢ When the Scan Waste pop-up window appears, **scan the UoS barcode** on the vial with your 2D barcode scanner.

➢ Enter the **reason** for waste.

➢ Enter the **number of doses** wasted, then click **Next**.

➢ **Review and confirm** the information you entered is correct, then click **Next**.

➢ Click **Finish** in the pop-up window.

Log Vaccine Waste Manually

➢ On the Inventory Management page below the available appointments data, click the **Manually Log Waste** button.

➢ **Enter** the required information in the Manually Log Waste pop-up window. The expiration date will auto populate and cannot be changed. Click **Next**.

➢ **Review and confirm** the information you entered is correct, then click **Next**.

➢ Click **Finish** in the pop-up window.

Monitor COVID-19 Vaccine Inventory Levels

Use the Inventory Management page to monitor inventory levels and view snapshots of available and booked appointments. This page gives you a complete view of important information about your vaccine inventory level.

This page gives you a snapshot of:

- The number of **appointments available** at your clinic over the next 28 days (including the current day)
- The total number of **appointments booked** at your clinic
- The total number of vaccine doses your clinic has in its **on-hand vaccine inventory**

The total on-hand inventory data on this page come from the inventory and waste you log in VAMS and what the clinic healthcare professional logs during vaccine administration. The healthcare professional's method of logging inventory and waste is similar to yours. They can either scan a 2D barcode or log the information manually.

The data from these waste and inventory logs will enter the on-hand inventory table in near-real time, representing the number of doses received and remaining from each UoS lot.

Access Support

Know how to find answers to frequently asked questions (FAQs) about VAMS.

Help Page

Click the Help link in the navigation bar to find support. The Help page has answers to **FAQs** about your role and access in VAMS.

You can read through the list of FAQs or you can search for a particular topic in the search bar located below the FAQs tab.

Section 3

Additional VAMS Functionality

Other VAMS Functions

This section will show you how to complete clinic administration tasks in VAMS that occur less frequently than those tasks described in Section 2 or that are only performed by certain clinic administrators.

The boxes below are clickable links to the appropriate pages in this user manual.

Are you a clinic administrator for a **mobile clinic?**

| Mobile Clinic Locations/Operating Hours | How to add locations and set operating hours for your **mobile clinic** |

Do you work at **multiple** clinics?

| Multi-Clinic User | How to access different clinics in VAMS if you will be **working at multiple vaccination clinics** and become a multi-clinic user |

Do you want to **enable your clinic staff to be eligible for COVID-19 vaccination?**

| COVID-19 Vaccine Eligibility for Clinic Staff | If you or **your clinic staff want to be eligible for COVID-19 vaccination**, follow the process outlined in this section. |

Are you a clinic administrator for a **third-party clinic?**

| Third-Party Clinic Administration | A **third-party clinic** is defined in VAMS as a LTCF, nursing home, or correctional facility. Reference this section in the user manual to review the differences between standard and third-party clinics, third-party clinic users in VAMS, and how to register your third-party clinic and add third-party recipients in VAMS. |

Do you need to **deactivate** your clinic?

| Deactivate Your Clinic | How to deactivate your clinic in VAMS |

👤 Mobile Clinic Locations and Operating Hours

Mobile clinics are those with multiple locations for vaccination (e.g., mobile clinic bus or van). These clinics can change their physical address but must have a permanent shipping address to receive inventory.

You can add new addresses and accompanying operating hours for your mobile clinic's locations after completing the mobile clinic's registration.

Add New Clinic Location

➢ Click the **Clinic Setup** tab to view the Clinic Locations table. This table shows all clinic locations you added and is where you can edit or delete them.

➢ Click the **New** button in the upper right corner to add a clinic location.

➢ Click in the **Clinic field** and **select** your clinic from the populated results.

➢ **Name the clinic location,** enter the address and select the time zone.

Quick Tip: Consider using a standard naming convention for your mobile clinic location names.

➢ **Enter** the **start and end dates** this clinic location will be active and available for recipient appointments.

NOTE: If you enter start and end dates that overlap with dates already set for another location, you will receive an error message. VAMS will not allow you to have two locations with overlapping start and end dates.

➢ Click **Save**.
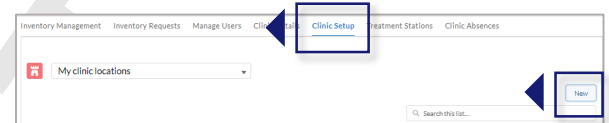
Set Operating Hours for a New Clinic Location

As you can see in the example, you can select from a set of operating hours you have already created and saved in VAMS or you can create new operating hours for this location.

➢ To create new operating hours, click the option in the drop-down menu and follow the same process outlined in Step 3: Set Up Clinic Schedule on how to create operating hours.

➢ When you want this new location to be available for recipients to schedule appointments during the start and end dates you set, click the **Available for Scheduling checkbox** at the top of the pop-up window. You can edit this at any time by editing the clinic location's details.

➢ Click **Save**.

Access Multiple Clinics in VAMS

You may need to perform the same or different user roles at multiple clinics. After the clinic administrator at each clinic adds you as a user, you can easily access the clinics after logging into VAMS.

➢ From any page in VAMS, click the **drop-down arrow** next to your name in the upper right corner to access the drop-down menu.

➢ Click **Switch Portals.**

    ○ If you have multi-user access (i.e., you have access to more than one portal [e.g., Clinic Portal and Recipient Portal, for example]), this will take you to the portal selection page. Click the **Clinic Portal** button, then you will see the **clinic selection** page shown below.

    ○ If you only have multi-clinic access (i.e., you have a clinic role at more than one clinic but do not have access to another portal) clicking **Switch Portals** will take you straight to the **clinic selection page**.
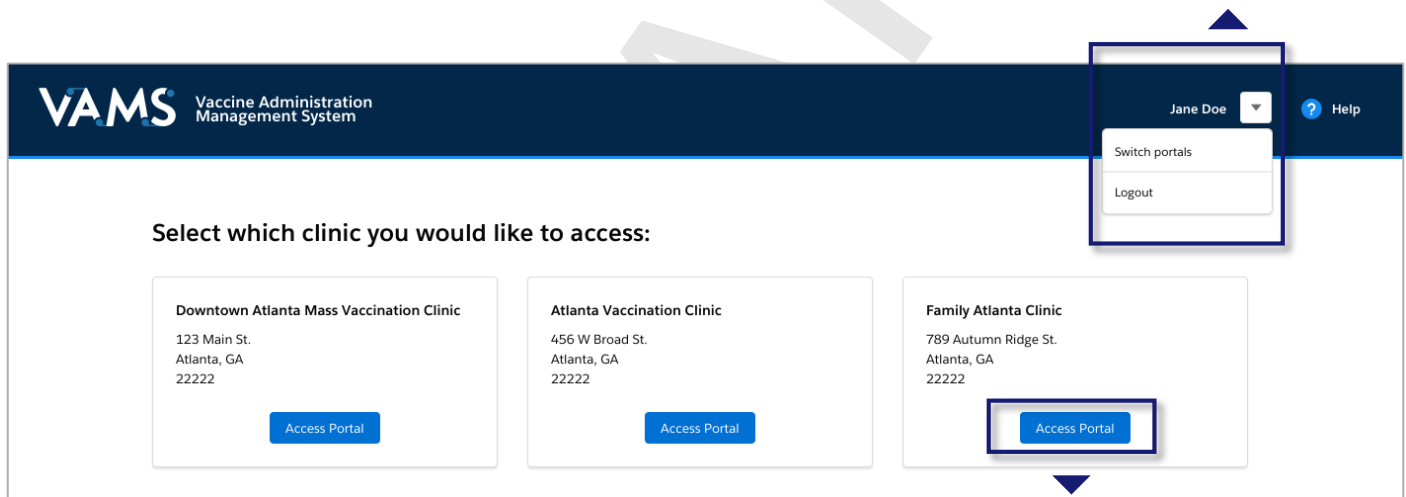
➢ From the clinic selection page, select the desired clinic by clicking the **Access Portal** button under the clinic name.

COVID-19 Vaccine Eligibility for Clinic Staff

If you or **your clinic staff want to be eligible for COVID-19 vaccination**, you must contact your jurisdiction POC and request they add your clinic in VAMS as an organization or employer. You or a delegate from your clinic will then register your clinic as an organization in VAMS. After completing registration, you or your clinic's delegate will add clinic staff as employees in VAMS, which will prompt a registration email to be sent to them. The steps are repeated below and instructions on how to perform each step are on the following pages.

1. **Request to be an Organization**
2. **Register Clinic as an Organization**
3. **Add Employees**
4. **Clinic Staff Members Register as COVID-19 Recipients in VAMS and Become Multi-Portal Users**

1. Request to be an Organization

For its staff to be eligible for COVID-19 vaccination, a vaccination clinic must register as an organization in VAMS.

You must request that your jurisdiction POC add your clinic as an organization. When adding you as an organization, your jurisdiction will need contact information for an organization/employer POC for your clinic. As the clinic administrator, you **can** be the organization/employer POC or you can **select a delegate** from your clinic to be the POC.

Regardless of whether you choose a delegate or fill the role yourself, when you contact your jurisdiction POC, provide them with contact information for the clinic's new organization/employer POC, including first and last name and the email address they use to log into VAMS.

Once the clinic is added as an organization in VAMS, the system **sends a registration email** from vams@cdc.gov to your clinic's organization/employer POC with a link to register their organization.

Instructions for the organization/employer POC on how to register the clinic as an organization and add clinic staff as employees are on the next page.

COVID-19 Vaccine Eligibility for Clinic Staff
*(continued)*

2. Register Your Clinic as an Organization

Register your clinic as an organization in VAMS to get access to the Organization and Employer Portal and add clinic staff as employees so they can be eligible for COVID-19 vaccination.

After your jurisdiction POC adds your clinic as an organization in VAMS, you will get an **email notification** from vams@cdc.gov with an **organization registration link.**

➢ If you're currently logged into VAMS, **log out** by clicking the drop-down arrow next to your name in the upper right corner of the page, then click "Logout."

➢ **Open** your email notification and click the **organization registration link**.

➢ On the next screen, enter the **email address** you use for your clinic user log-in.

➢ Enter the **same password** you use when logging in as a clinic user. Complete the **reCAPTCHA**, then click **Login**.

NOTE: You must verify your identity through this two-factor authentication process every time you log into VAMS. After five failed log-in attempts, you will be locked out of the system for one hour.
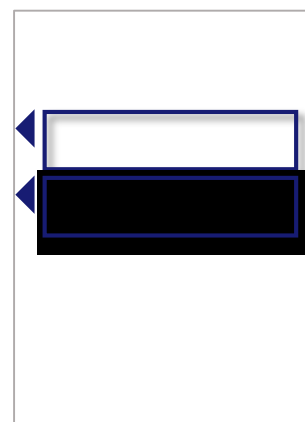
After logging in, you will see the **Portal Selection** screen where you can choose from two portals: Clinic Portal and Organization and Employer Portal.

➢ Click **Access Portal** below the Organization & Employer portal to complete your organization registration.

NOTE: Use the **Clinic Portal** for your role as a clinic user and the **Organization and Employer Portal** for the new employer account you just registered for your clinic.
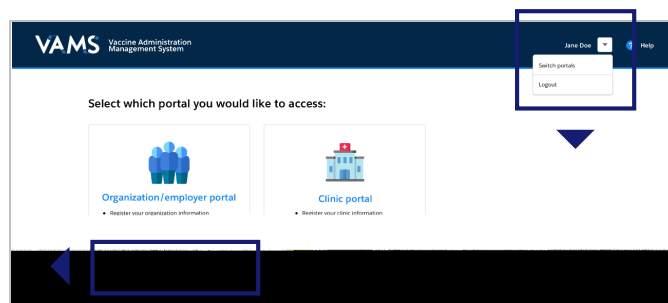
Quick Tip: While logged into VAMS, you can switch portals by clicking the drop-down arrow next to your name in the upper right corner and selecting **Switch portals**.

COVID-19 Vaccine Eligibility for Clinic Staff
(continued)

2. Register Your Clinic as an Organization *(continued)*

After accessing the Organization and Employer Portal, you will be taken to the **Register Organization** page.

➢ **Verify** the information entered by the jurisdiction POC is correct and click **Next**.

➢ Enter additional **required information** on the **Organization Information** page and click **Next**.

➢ **Review** all of your clinic's information. If everything is correct, click **Next**. If not, click **Previous** to make corrections.

COVID-19 Vaccine Eligibility for Clinic Staff
(continued)

3. Add Clinic Staff as Employees in VAMS

We will use the term "employee" to signify any worker, staff member, volunteer, or other personnel being added in VAMS for COVID-19 vaccination.

Adding clinic staff as employees allows them to register as COVID-19 vaccine recipients and schedule vaccination appointments in VAMS.

➤ Click the **Add Employee** button on the Organization and Employer Portal home page.

➤ Enter the employee's first and last name and email address. Click **Save**.

Note the following field requirements:
- o First Name is limited to 255 characters
- o Last Name is limited to 255 characters
- o Email address must contain an "@" sign and valid domain (.com, .gov, etc.) or an error message will appear
- o If the email address you entered already exists in VAMS, you will receive an error message that states "An employee with this email already exists."

After adding an employee in VAMS, a **registration email** is sent to them from vams@cdc.gov with a link for them to register as a COVID-19 vaccine recipient.

Quick Tip: Don't forget to add yourself as an employee! Use the same email address you use to log in as a clinic user and organization POC.

Follow the registration process outlined on the next page. Once registered, you will have access to three portals: Clinic, and Employer, and Recipient.

COVID-19 Vaccine Eligibility for Clinic Staff
(continued)

4. Clinic Staff Members Register as COVID-19 Recipients in VAMS and Become Multi-Portal Users

After you're added as an employee in VAMS a registration email is sent to you from vams@cdc.gov with a link to register as a COVID-19 vaccine recipient.

➢ If you're logged into VAMS, first **log out** by clicking the drop-down arrow next to your name in the upper right corner, then click **Logout**.

➢ Open your recipient registration **email notification** and click the link to register your account.

➢ On the next screen, enter the **email address** you use for your clinic user log-in.

➢ Enter the **same password** you use when logging in as a clinic user. Complete the **reCAPTCHA**, then click **Login**.

NOTE: **Multi-portal users** use the same email address and password to log into VAMS for every user role they hold. However, once logged in, they have multiple portals to select from depending on what they want to do in the system.

After logging in, you will be taken to the **Portal Selection** screen where you now have multiple portals to choose from, including the Clinic Portal and Recipient Portal. **You are now officially a VAMS multi-portal user!**

➢ Click **Access Portal** below the Recipient Portal to complete your recipient registration.

Quick Tip: While logged into VAMS, you can switch portals by clicking the drop-down arrow next to your name in the upper right corner and selecting **Switch portals.**

🧑 Third-Party Clinic Administration

A third-party clinic is a clinic established in an existing facility such as a LTCF, nursing home, or correctional facility to facilitate the administration of COVID-19 vaccine to recipients who reside in those facilities. The information presented here is only relevant for administrators of third-party clinics. The pages that follow will provide information on the following topics:

- How to Register Your Third-Party Clinic in VAMS
- Key Differences Between Standard and Third-Party Clinics
- Third-Party Clinic Users
- Add Third-Party Recipients in VAMS

How to Register Your Third-Party Clinic

As a third-party clinic administrator, you will set up your clinic by following steps 1: Activate Your User Account, 2: Register Your Clinic in VAMS , 4: Add Clinic Staff as VAMS Users in this user manual. However, you **will not** perform any of the activities outlined in Step 3: Set Up Your Clinic's Schedule in VAMS.

Key Differences Between a Standard Clinic and a Third-Party Clinic

As a third-party clinic administrator, you or the healthcare professional will serve as the third-party to vaccine recipients who cannot create an account or record their medical history in VAMS.

- A third-party clinic will only require two types of VAMS users to register in the system: clinic administrators and healthcare professionals. Since recipients will not schedule appointments and will be preselected by the facility where they reside, there is no need for front desk staff.

- Recipients will not be creating their own accounts and recording their medical histories in VAMS so a recipient's record will need to be added in the system for them. This can be done by either the **third-party clinic administrator** or **healthcare professional**.

👤 **Third-Party Clinic Administration** *(continued)*

Third-Party Clinic Users

The VAMS Roles and Activity Matrix below illustrates the additional activities a third-party clinic administrator and healthcare professional will be able to perform in VAMS. Highlighted in blue are activities that are unique to both the clinic administrator and healthcare professional roles in a third-party clinic setting.

VAMS Roles and Activity Matrix

Activity in VAMS	Standard Clinic Administrator	Third-Party Clinic Administrator	Standard Clinic Healthcare Professional	Third-Party Clinic Healthcare Professional
Serve as the clinic's point of contact for your jurisdiction	✓	✓		
Manage clinic information (e.g., physical address)	✓	✓		
Set and manage clinic schedule	✓			
Manage (add, edit, remove) VAMS users	✓	✓		
Submit inventory requests	✓	✓		
Log vaccine inventory when received	✓	✓		
Log vaccine waste	✓	✓		
Add recipient information and insurance (if applicable), and record vaccine consent in VAMS		✓		✓
View recipient medical history and personal information; add notes to record			✓	✓
Log vaccine administration			✓	✓
Administer vaccine to recipients			✓	✓
Log vaccine waste that occurred during administration (if applicable)			✓	✓
View next dose eligibility dates			✓	✓
Track recipients' next dose eligibility				✓

👤 **Third-Party Clinic Administration** *(continued)*

Add Third-Party Clinic Vaccine Recipients in VAMS

Since vaccine recipients will not be creating their own accounts and recording their medical histories in VAMS, they will need to be added in VAMS by you as the **third-party clinic administrator** or **healthcare professional**.

The recipient information you will need in order to add them in VAMS includes:
- First and last name
- Gender
- Ethnicity and race
- Whether they have given consent to receive the COVID-19 vaccine. If the recipient has not yet given consent or you don't know if their consent has been obtained, you or the healthcare professional can edit this response at any time after the recipient has been added in VAMS.
- Insurance information (if applicable)
- Medications (if applicable)
- Other relevant medical information (if applicable)

There are two ways to add recipients in VAMS: one at a time or bulk upload. First, we will review how to add one recipient at a time, then how to bulk upload them.

Add Third-Party Clinic Recipients One at a Time

- ➤ Click the **Add Recipient** from the **Manage Recipients** page, which is also your clinic's home page in VAMS.

- ➤ Enter the **recipient's information**. The recipient's home address will default to the third-party clinic's address in VAMS. Click **Next**.

- ➤ Enter the **recipient's insurance information** (if applicable). Click **Next**.

- ➤ **Review** all information entered in the Add Recipient pages and **verify** it is correct. If so, click **Next**. If not, click **Previous** to make corrections.

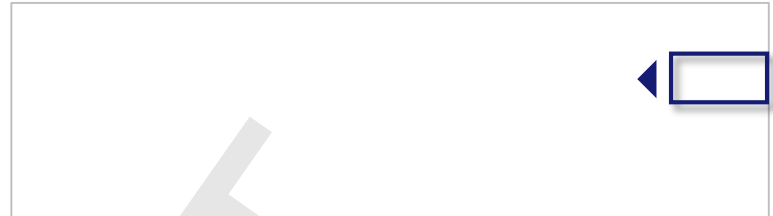- ➤ After clicking **Next**, the recipient's record is saved in VAMS.

 **Third-Party Clinic Administration** *(continued)*

Bulk Upload Third-Party Clinic Recipients

Bulk uploading allows you to add multiple recipients at once by adding their information into a csv spreadsheet and uploading it in VAMS.

➢ Click **Import Recipients** from the **Manage Recipients** page.

➢ Click the **Recipient Import Template** link in the pop-up window that appears. After clicking the link, the template file downloads to your computer.
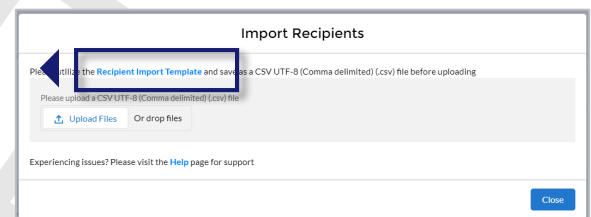
Important Notes About the Recipient Import Template File:

- The file opens on your computer as an .xlsx file, but you **must** save it as a **CSV UTF-8 (Comma delimited) (.csv)** file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.

- You **must** use this template when uploading a list of recipients in VAMS.

- All fields marked with an asterisk are required.

- Fields that contain a pick list or drop-down options **must** contain a selection.

- The recipient's DOB must be in MM/DD/YYYY format.

- VAMS will not upload a recipient if any of the required fields are missing.

- VAMS will not upload **duplicates** if someone is listed in the csv file multiple times.

- There is a file size limit of 25 MB.

- The limitation of the load will be 9,999 recipients. If the file contains 10,000 or more recipients, the following error message will appear: "The file uploaded has more than 9,999 records which exceeds the limit of the Import Functionality. Please try again."
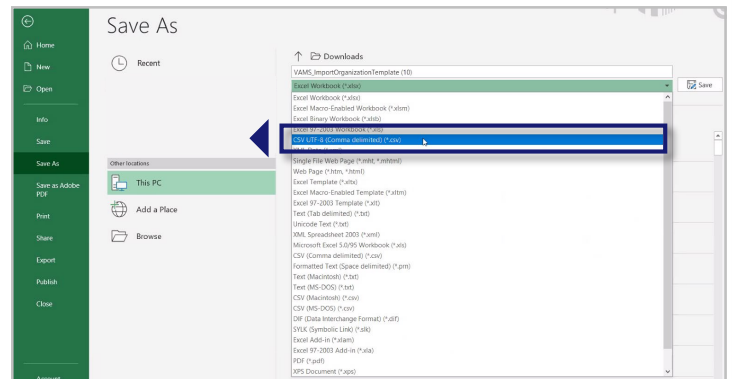

NOTE: A comma separated values (csv) file is a plain text file that contains a list of data. These files are often used for exchanging data between different applications.

Third-Party Clinic Administration *(continued)*

Bulk Upload Third-Party Clinic Recipients *(continued)*

➢ Open the file and enter the **recipients' information.**

➢ Save the file as a **CSV UTF-8 (Comma delimited) (.csv)** file. You can find this option under the **Save As** drop-down menu in Excel.

➢ Click **Upload Files** in the Import Recipients pop-up window. You can also drag and drop your organization list in the **Drop Files** area of the page.


➢ Click **Close**.
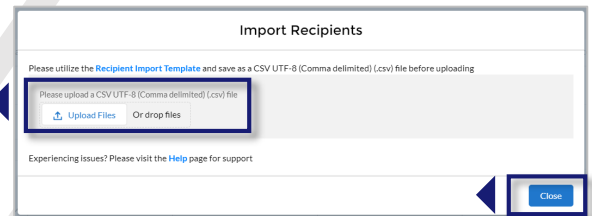
Confirm Bulk Upload

After importing a list of recipients, these processes automatically occur in VAMS:

- A message appears on screen that your list is in the import queue.
- You receive an email from vams@cdc.gov after your list has processed, stating it has been uploaded.
- A result log appears on the Recipient Import page.

➢ Click the **Recipient Import** tab to check the results of your bulk upload.
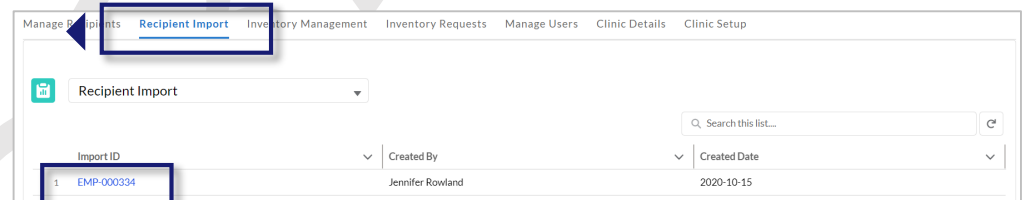
On the **Recipient Import** page, you will see information about your upload, including the system-generated Import ID number, who imported the list, and when it was imported.

➢ Click the **Import ID** number of the recipient import to open the import details page.

Third-Party Clinic Administration *(continued)*

Confirm Bulk Upload *(continued)*

There are two main sections on the Import Details page:

- **Import details,** which includes the import ID, jurisdiction name, created by, and created date.

- **Notes and Attachments** table, which includes two files: a **Result Log for Bulk Upload** and the recipient import file you uploaded.

  - o The **Result Log for Bulk Upload** file shows the results of your file upload.

➢ Click the **Result Log for Bulk Upload** link to open the file.

➢ Scroll to the right until you see the **status column.** The **status column** shows whether a recipient was added in the system.

- If there were duplicates or missing information in the csv file, you will see an **error message** telling you why a recipient was not uploaded.

- All recipients who have a status of **Success** are uploaded in the system. Recipients' whose statuses include an error message have not been uploaded in the system.

Deactivate Your Clinic

Deactivate your clinic when it is no longer needed to administer COVID-19 vaccines. Deactivating a clinic in VAMS triggers the system to:

- Send an email to the jurisdiction POC informing them the clinic is deactivated.
- Send a cancellation email to recipients whose appointments are cancelled.
- Cancel all recipient appointments booked at the clinic.
- Remove the clinic in the search results for recipients.
- Deactivate all clinic inventory requests.
- Close all open appointments.

Deactivate Your Clinic

➢ Click the **Clinic Details** tab.

➢ Click the **Deactivate Clinic button** in the bottom right corner of the page.

- A Deactivate Clinic pop-up appears and asks you to **confirm deactivation.** It also gives you the number of total booked appointments and vaccines in the clinic's inventory.

➢ Click **Deactivate Clinic** to continue. If you change your mind, click **Cancel.** This closes the pop-up window and redirects you to the Account page.

Deactivating a clinic does not remove user permissions in VAMS.
- Once a clinic is deactivated, you must remove each clinic user from the system following the same process outlined in Manage VAMS Users.

Glossary of Terms

Word/Phrase	Definition
2D Barcode	A two-dimensional barcode that stores information vertically and horizontally. It may contain the vaccine product identification information, lot number, and expiration date
Employee	Any worker, staff member, volunteer, or other personnel being added in VAMS to receive COVID-19 vaccine
Employer	One type of organization
Mobile Clinic	A clinic that moves to multiple locations for vaccination (e.g., a mobile clinic bus or van)
Multi-clinic User	A clinic user who performs the same or different roles at multiple clinics registered in VAMS. This user can switch between clinic VAMS accounts within the Clinic Portal.
Multi-user	A VAMS user with access to multiple VAMS portals (e.g., a clinic administrator who is also registered as a VAMS recipient can access the Clinic Portal and Recipient Portal)
Organization	Any institution, association, company, or other group that will add their essential workers in VAMS
Pop-Up Clinic	A temporary clinic that has one permanent location (e.g., a clinic set up in a school gym that will stay at that location while it is open)
Third-Party Clinic	A vaccination clinic established at a facility like a long-term care facility or correctional facility where the facility will be responsible for administering vaccines to recipients
Treatment Station	Vaccination stations are currently called "treatment stations" in VAMS and therefore in parts of this user manual
Unit of Sale (UoS)	The packaging in which the vaccine vials are delivered
Unit of Use (UoU)	The vaccine vial
Vaccination Clinic	A clinic administering COVID-19 vaccine (sometimes referred to as a "vaccine clinic" in VAMS and this user manual)