

User Manual

Employer Coordinator

Table of Contents

Title	Page
Introduction	<u>2</u>
• Welcome to VAMS	<u>2</u>
• Roles and Responsibilities in VAMS	<u>3</u>
• Navigating VAMS	<u>4</u>
Section 1 Getting Started in VAMS	<u>5</u>
• Step 1: Activate Your User Account	<u>6</u>
• Step 2: Register Your Organization in VAMS	<u>7</u>
Section 2 Register Employees and Volunteers for COVID-19 Vaccination	<u>8</u>
• Policy Enabled Registration	<u>9</u>
• Add Employees in VAMS One at a Time	<u>10</u>
• Add Employees in VAMS via Bulk Upload	<u>11</u>
• Add Yourself as an Employee of Your Organization	<u>13</u>
Section 3 Additional VAMS Functionality	<u>14</u>
• View List of Employees	<u>15</u>
• Access Support	<u>16</u>
Glossary of Terms	<u>17</u>



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 in 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.



Role and Responsibilities in VAMS


As an **employer coordinator**, you will use VAMS to identify critical infrastructure workers and other at-risk groups who need to receive COVID-19 vaccine when it first becomes available and add these individuals to VAMS so they can schedule vaccination appointments.

This user manual is designed for **you**.

This user manual gives you a description of your role and responsibilities in VAMS and where you fit in to the overall process of providing COVID-19 vaccines to recipients. It is divided into sections that follow the order of steps you will take in VAMS to perform your unique tasks. Detailed instructions on how to perform those tasks are included in each section.

How to Use this User Manual

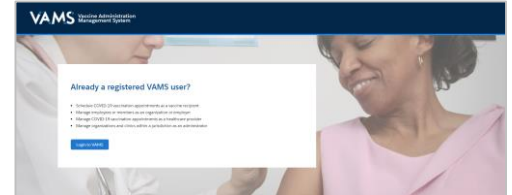
Throughout this user manual, you will see the following components.

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).
	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.

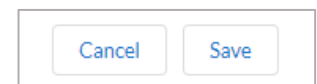
Header/Banner



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.

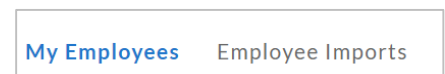
Buttons

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.

	First Name	Last Name	Email
1	Johnny	Approved	email@email.com
2	Johnny	Approved	email@email.com
3	Johnny	Approved	email@email.com

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

Getting Started in VAMS

This checklist provides a summary of the two steps you will take to add your organization in VAMS so that your critical infrastructure employees, or other individuals that you have identified, can become eligible to receive COVID-19 vaccination.

Step	Information You Need to Complete this Step
<input type="checkbox"/> Step 1: Activate your user account in VAMS. Follow the prompts in your registration email from vams@cdc.gov to complete this step.	<ul style="list-style-type: none">• Access to the internet• Access to your email account• Registration email from vams@cdc.gov
<input type="checkbox"/> Step 2: Register your organization. Confirm that your contact information and organization information in VAMS is correct.	<ul style="list-style-type: none">• Organization name• Primary address• Phone number• Your email address



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**

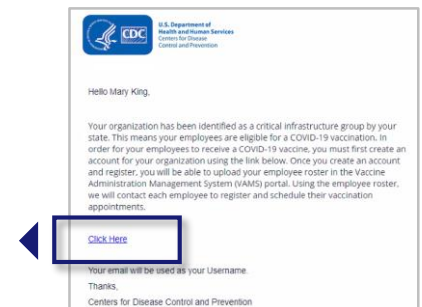
You must activate an account in VAMS to use the system. After your jurisdiction's POC enters your name and email address in VAMS, you will get an email with a link to create an account in VAMS.

- 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.

After creating your account, you will immediately be taken to the **Register Organization** page.



Step 2: Register Your Organization in VAMS

What you'll need to complete this step

- Organization name
- Organization address
- Phone number
- Your email address

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

➤ On the Organization Information page, **confirm your organization's information is correct**. If not, make the necessary edits, then click **Next**.

➤ **Review** all information. If everything is correct, click **Next**. If not, click **Previous** to make corrections.

Section 2

Register Employees and Volunteers for COVID-19 Vaccination

Now that you activated your account and registered your organization in VAMS, you can use the system to add your employees or volunteers in VAMS so they can become eligible to receive COVID-19 vaccination. This can be done by allowing them to register through policy enabled registration, adding them in VAMS individually or via bulk upload, or a combination of all three methods.

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

Three Ways to Add Employees in VAMS So They Can Register for COVID-19 Vaccination

Policy Enabled Registration

Policy Enabled Registration (PER) allows an organization to send a common registration link for employee registration.

Add Employees in VAMS One at a Time

Enter employees' names and email addresses in VAMS one at a time.

Add Employees in VAMS via Bulk Upload

Add multiple employees in VAMS at one time by using the bulk upload function.

Add Yourself as an Employee of Your Organization

Don't forget to add yourself to become eligible to receive COVID-19 vaccination.



Policy Enabled Registration

Policy Enabled Registration (PER) allows an organization to send a common registration link for their employees' registration in VAMS.

For your organization to use PER for your employees, provide up to three email domains (e.g., fultoncounty.gov, fultoncounty.org, etc.) to the jurisdiction POC so they can include that information when adding your organization in VAMS. **NOTE:** This must be done when the jurisdiction POC first adds your organization in VAMS as they **cannot edit your organization's record** after it has been added in the system.

Once the jurisdiction POC adds the email domain(s) you provided and you registered your organization in VAMS, you will see an organization-specific registration link on your portal's home page. You can copy this link and distribute to your employees.

- Employees will access VAMS using the organization-specific registration link you distributed and enter their organization email and name.
- The system will validate that the email entered by the employee has the same domain as one of the domains the jurisdiction POC entered in your organization's record.
- VAMS will send a unique registration link to the employee email (e.g., username@domain.com).
- Employees can click the registration link and start the standard registration flow at pre-screening, then enter personal, medical, and insurance information and additional organization details.
- Employees cannot change their email during registration.

NOTE: Third-party email domains such as Yahoo Mail or Gmail cannot be used for PER. Domains used must be owned by the organization or an affiliate.



Add Employees in VAMS One at a Time

We use the term “employees” to signify any worker, staff member, volunteer, or other personnel added to VAMS to receive COVID-19 vaccination.

In addition to policy enabled registration, there are **two other ways to add employees in VAMS** so they can register to become eligible to receive COVID-19 vaccination: one at a time or via bulk upload by importing a list of names. On this page, we’ll learn how to add employees one at a time.

- Click the **Add Employee** button in the Organization & Employer Portal home page.

- Enter the employee’s first and last name and email address. Click **Save**.

Note the following field requirements:

- First name is limited to 255 characters
- Last name is limited to 255 characters
- Email address must contain an "@" sign and valid domain (.com, .gov, etc.) or an error message will appear
- 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.”

NOTE: All three fields are mandatory, as indicated by a red asterisk(*) next to the field names on the form.

After adding an employee in VAMS, a **registration email** is sent to them from vams@cdc.gov with a **link** to register their account and schedule a vaccination appointment.



Add Employees in VAMS via Bulk Upload

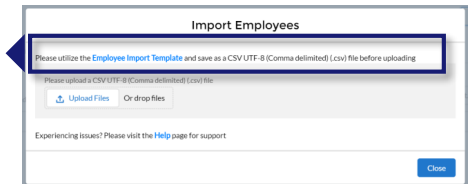
In addition to policy enabled registration and adding employees one at a time, you can also add multiple employees in VAMS at once with bulk upload.

- From the Organization and Employer Portal home page, click the **My Employees** tab.



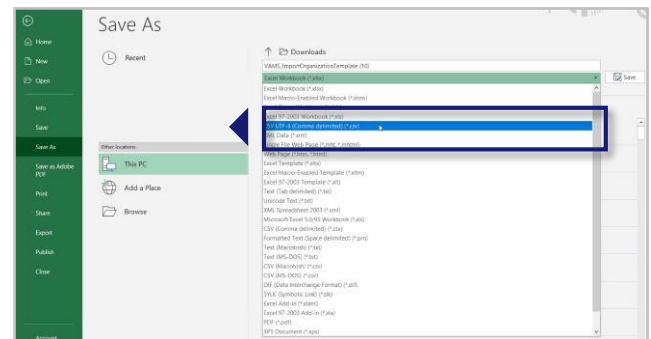
- Click the **Import Employees** button in the top right corner of the page.

- Click the **Employee Import Template** link in the pop-up window that appears. After clicking the link, the template file downloads to your computer.



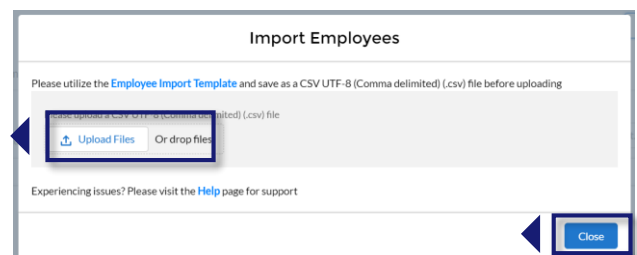
Important Notes About the Employee Import Template File:

- 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 employees in VAMS.
- All fields marked with an asterisk are required.
- Fields that contain a pick list or drop-down options **must** contain a selection.
- VAMS will not upload an employee if any of the required fields are missing.
- VAMS will not upload duplicates if someone is listed in the csv file multiple times.



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.

- Open the file and **enter your employees' 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.
- In the Import Employee List pop-up window, click the **Upload Files** button or drag and drop your employee list in the **Drop Files** area of the page.
- Click **Close**.





Add Employees in VAMS via Bulk Upload

(continued)

Confirm Bulk Upload

Once you have imported a list of employees, these processes will occur in VAMS:

- A **message appears** on screen that your list is in the import queue.
- VAMS sends a **registration email** from vams@cdc.gov to each employee if their information was entered in the csv file completely.
- You **receive an email** from vams@cdc.gov after your list has fully processed, stating that it has been uploaded. Depending on the size of the import file, your employee list may not upload immediately.
- A **Result Log for Bulk Upload** file appears in the Employee Imports page. This file shows you all of the employees added to the system and explains why some may not be added. See the instructions below to view the Result Log for Bulk Upload file.

- Click the **Employee Imports** tab to check the results of your bulk upload.

The **Employee Imports** page shows information about your uploads including the system-generated Import ID number, who imported the list, and when it was imported.

Import ID	Created By	Created Date
1. EMP-000034	Mary King	7/28/2020, 3:36 PM
2. EMP-000035	Mary King	7/28/2020, 3:43 PM

- Click the **Import ID** number of the employee import to open the import details page.

Below the import details is the **Notes and Attachments** table. This includes two files: a **Result Log for Bulk Upload** and the **employee import** file you uploaded.

Title	Type	Owner	Last Modified
ResultLog for BulkUpload-Tue, 28 Jul 2020 3:36 PM.csv	Attachment	Mary King	7/28/2020, 3:36 PM
Uploaded File-Tue, 28 Jul 2020 3:36 PM.csv	Attachment	Mary King	7/28/2020, 3:36 PM

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

- Scroll to the right until you see the **status column**. This column indicates if an employee was added in the system.

- If there were duplicates or missing information, you will see an **error message** saying why an employee was not uploaded in VAMS.

	A	B	C	D	E	F	G	H	I
1	FirstName	LastName	Email	Status					
2				Insert failed due to blank values. All Fields Are Required					
3	Random	User	ruser@ms	email already exists in the system					
4	FNU	LNU	Inufnu@n	email already exists in the system					
5									
6									
7									

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



Add Yourself as an Employee of Your Organization

For you to become eligible to receive COVID-19 vaccination, you must be an employee of your organization in VAMS.

- To add yourself as an employee, click the **Add Employee** button.
- Enter your first and last name and email address.

NOTE: Use the same email address you use for your Employer Coordinator log-in.

After adding yourself as an employee, a **recipient registration email** is sent to you from vams@cdc.gov with a link to the VAMS landing page.

- If you're 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 recipient **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: You must verify your identity through a two-factor authentication process every time you log into VAMS. After five log-in attempt failures, you will be locked out of the system for one hour.

- After logging in, you will be taken to the **Portal Selection** screen where you will now have multiple portals to choose from including the Organization and Employer and Recipient portal.

- Click the **Access Portal** button 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**.

Section 3

Additional VAMS Functionality

Other VAMS Functions

This section shows you how to perform other tasks in VAMS that are not related to registering employees for COVID-19 vaccination.

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

Employees Entered in VAMS

View List of Employees

View a list of all employees you entered in VAMS or search for a specific employee.

Access VAMS Support

Access Support

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

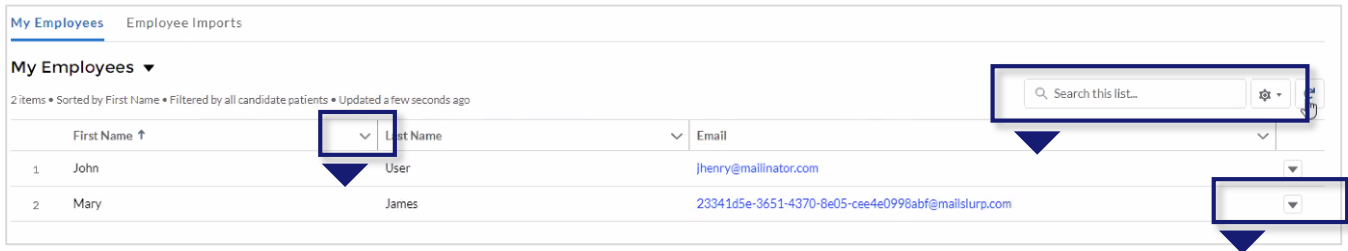
View Employee List

View Employee List and Search

View a comprehensive list of employees you entered in VAMS by clicking the **My Employees** tab. You can also search for a particular employee on this page (see below).

Search for An Employee

There are multiple ways to search for employees on the **My Employees** page.



The screenshot shows the 'My Employees' page with a table containing two employees. Annotations highlight the search bar and sorting arrows.

	First Name ↑	Last Name	Email
1	John	User	jhenry@mailinator.com
2	Mary	James	23341d5e-3651-4370-8e05-cee4e0998abf@mailslurp.com

- You can search by clicking the **arrows** in the columns to sort them by the column headers (e.g., first name, email, etc.).
- You can also use the **search bar** to enter information such as first name, last name, or email address.



Access Support

Click the **Help** link in the navigation bar to find support. The Help page has answers to **FAQs** about the employer coordinator role 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.

A screenshot of the VAMS Organization & Employer Portal. The header includes the VAMS logo, the text "Organization & Employer Portal" and "Vaccine Administration Management System", the user name "John Coordinator" with a dropdown arrow, and a "Help" link with a question mark icon. Below the header, there is a tab labeled "Organization & Employer FAQ". Under this tab, there is a search bar with the placeholder text "Search" and a magnifying glass icon. Below the search bar, a FAQ entry is visible with the title "How do I add Employees?", a description "Contains the steps to add Employees", and metadata "9 Views · Jul 23, 2020 · Knowledge".

VAMS Organization & Employer Portal
Vaccine Administration Management System

John Coordinator ▼ ? Help

Organization & Employer FAQ

Search

Q

How do I add Employees?

Contains the steps to add Employees

9 Views · Jul 23, 2020 · Knowledge

Glossary of Terms

Word/Phrase	Definition
.csv	A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values.
Employee	Any worker, staff member, volunteer, or other personnel being added in VAMS to receive COVID-19 vaccination.
Employer	One type of organization.
Organization	Any institution, association, company, or other group that will add their essential workers to VAMS.
Vaccination Clinic	A clinic administering COVID-19 vaccination. Sometimes referred to as a “vaccine clinic” in VAMS and this user manual.