

# User Manual Inventory Manager

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#### 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 vaccination 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.

<sup>\*&</sup>quot;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.

<sup>\*\*</sup>To use VAMS, vaccine recipients must have internet access, an email address, and the ability to navigate the system or have someone assist them.

<sup>\*\*\*</sup>Vaccination clinics are often referred to as "vaccine clinics" in VAMS.



# **Your Role and Responsibilities**

As an **inventory manager**, you will use VAMS to manage COVID-19 vaccine inventory for your clinic. In VAMS, you can place and manage inventory requests, log vaccine inventory and waste, monitor inventory levels, and communicate with your jurisdiction about inventory requests.

As you see below, the activities you will perform in VAMS can also be done by the clinic administrator but will be your primary responsibility.









Responsibilities	Clinic Inventory Manager	Clinic Administrator	Clinic Front Desk	Clinic Healthcare Professional
Serve as clinic point of contact for your jurisdiction		✓		
Manage clinic information (e.g., physical address)		✓		
Set and manage clinic schedule		✓		
Place vaccine inventory requests	✓	✓		
Log vaccine inventory when received	✓	✓		
Log vaccine waste (if applicable)	✓	✓		
Monitor clinic vaccine inventory levels to match appointments scheduled	✓	✓		
Manage (add, edit, remove) VAMS users		✓		
Check in vaccine recipients			✓	
Create walk-in recipient appointments			✓	
Cancel recipient appointments			✓	✓
Confirm recipient identity			✓	✓
Access and review recipient record (name, date of birth [DOB], medical history, known allergies, etc.); add notes to record (if applicable)				<b>√</b>
Log vaccination (vaccine information, outcome, and waste, if applicable)				✓
View next-dose eligibility dates				✓



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

This manual describes your role and responsibilities (referred to as "tasks" or "activities" in this user manual) in VAMS. Detailed instructions on how to perform your tasks are included in each section. This manual also includes an overview of other VAMS user roles and responsibilities to provide context on how you will work with other users in the system.

#### **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).
Access Support	Buttons like the one pictured also link to other pages in this user manual.



## **Navigating VAMS**

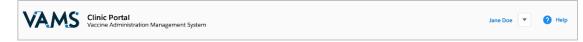
**Quick Tip**: VAMS works best in the Google Chrome browser but can be accessed via any browser except Internet Explorer. VAMS also works on mobile browsers.

To access VAMS, visit the landing page (<a href="https://vams.cdc.gov/vaccineportal/s">https://vams.cdc.gov/vaccineportal/s</a>) 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 in 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 <a href="https://www.cdc.gov/phlp/publications/topic/hipaa.html">https://www.cdc.gov/phlp/publications/topic/hipaa.html</a>.

# **Section 1**

# **Getting Started in VAMS**

This section will show you how to activate your account in VAMS. After you have activated your account, you can begin to use VAMS to manage your clinic's inventory of COVID-19 vaccine.

The box below is a clickable link to the corresponding page in this user manual.

#### **Getting Started in VAMS**



Learn how to use the registration link in your email to create your account and access VAMS.



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 receive an email with a VAMS registration link.

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.

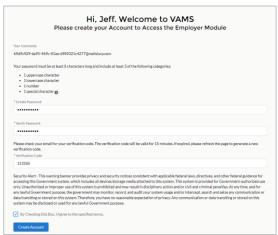
Click the registration link in the email. This takes you to the account creation page in VAMS.

**NOTE**: The registration link in your email is <u>for your registration only</u> 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 are immediately taken to the Clinic Portal home page, where you see the Inventory Management and Inventory Requests tabs.

# **Section 2**

# **Inventory Management in VAMS**

Now that you have activated your VAMS user account, you can use VAMS to manage your clinic's COVID-19 vaccine inventory by performing the tasks below.

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

#### **COVID-19 Vaccine Inventory Requests**

Place COVID-19 Vaccine Inventory Requests

Inventory managers and clinic administrators can use VAMS to place COVID-19 vaccine inventory requests with their jurisdictions.

Track COVID-19 Vaccine Inventory Requests

Track and communicate with jurisdiction points of contact (POCs) about the inventory requests you place in VAMS.

#### **COVID-19 Vaccine Inventory Management**

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.



# Place COVID-19 Vaccine Inventory Requests

#### What you'll need to place inventory requests

Desired product type, number of doses

As the inventory manager, you will submit 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.

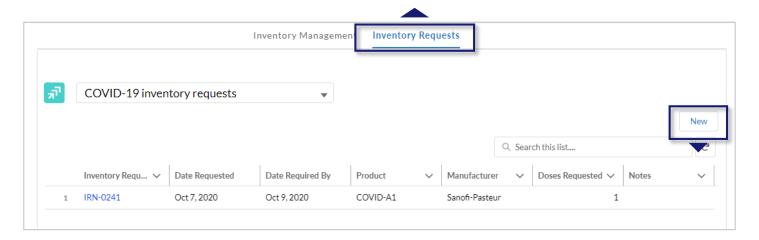
While you will place all inventory requests in VAMS, the jurisdiction POC will place all COVID-19 vaccine orders outside of VAMS through an established process determined by the jurisdiction.

**NOTE:** Inventory <u>requests</u> 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 <u>order</u> 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. The list includes a system-generated **inventory request number**, **clinic name**, **product type** (vaccine type) requested, **date requested** and **required**, number of **doses requested**, and inventory request **status**.

#### **Place Inventory Requests**

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

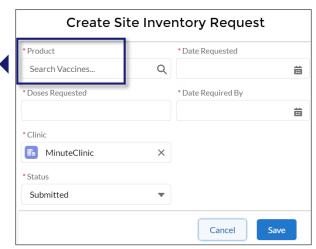


Click the New button in the upper right corner of the Inventory Requests table.

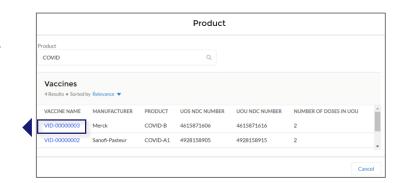


The **Create Site Inventory Request** pop-up window includes several required fields (noted by a red asterisk).

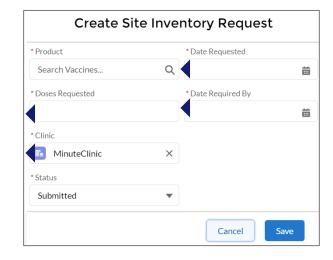
➤ Click in the **Product** field and start typing the kind of vaccine product you want to order (e.g., COVID). Press **enter** or click the **magnifying glass** icon.



- ➤ 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 Create 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 **want to receive** the doses you are requesting.



Click Save to save your inventory request. VAMS will send your request to your jurisdiction POC.



# 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 the request 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.

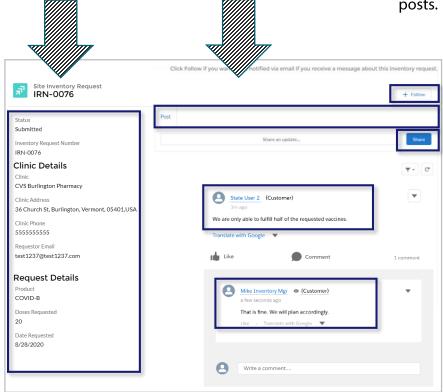
This section of the record has details about the inventory request.

#### 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 an email notification 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 Mgr." 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.



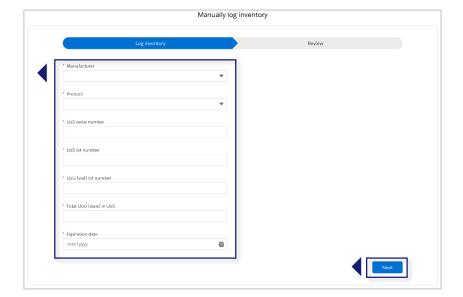
# Log COVID-19 Vaccine Inventory (continued)

#### **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.

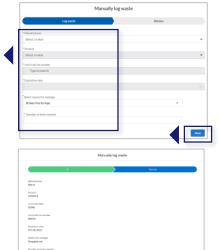


#### **Log Vaccine Waste Manually**

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

Waste successfully logged

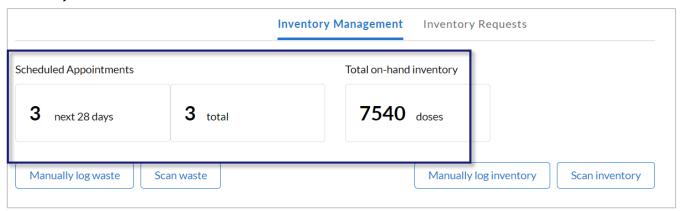
- ➤ Enter the required information in the Manually Log Waste pop-up window. The expiration date will auto-populate and cannot be changed. Click Next.
- Review and confirm the information you entered is correct, then click Next.
- Click Finish in the pop-up window.





# **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.

# **Section 3**

# Additional VAMS Functionality

This section will show you how to perform other infrequent actions in VAMS, like registering as a COVID-19 vaccine recipient, or actions that will only apply to certain users, such as those who work at multiple clinics.

#### **Other VAMS Functions**

Register as a COVID-19 Vaccine Recipient

Learn how to become eligible to receive COVID-19 vaccination.

Access Multiple Clinics in VAMS

Access different clinics in VAMS if you work at multiple vaccination clinics.

**Access Support** 

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



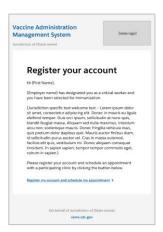
# Register as a COVID-19 Vaccine Recipient

#### Register as a COVID-19 Vaccine Recipient in VAMS

Before you can register as a COVID-19 vaccine recipient, your clinic administrator must register your clinic as an organization in VAMS and then add you as an employee of the organization.

After your clinic administrator registers your clinic as an organization and adds you as an employee in VAMS, a registration email will be 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**.

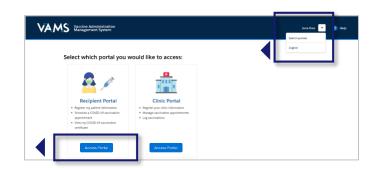
**NOTE:** You must use the same email address and password to log into VAMS for every user role you hold.



After logging in, you will be taken to the **Portal Selection** screen where you will 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**.

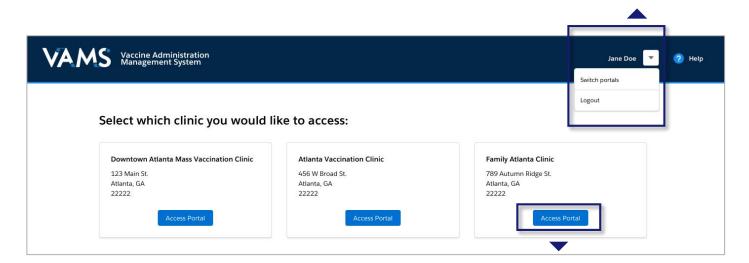




## **Access Multiple Clinics in VAMS**

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 for their clinic, you can easily access multiple 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-portal access (i.e., you have access to more than one portal—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.
  - o 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**, choose which clinic you want to switch to by clicking the **Access Portal** button under the clinic name.

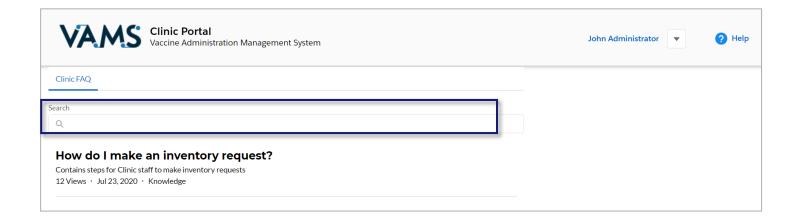


#### Where to Find Additional VAMS Resources and Information

#### **Help Page**

Click the Help link in the upper right corner of the navigation bar to find support. The **Help** page has answers to frequently asked questions (**FAQs**) about the clinic portal roles 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.



# **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 vaccination.
Employer	One type of organization; "employer" is included in the user's title for further clarity on the user's role.
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 accounts within the Clinic Portal.
Multi-Portal 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.
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 vaccination. Sometimes referred to as a "vaccine clinic" in VAMS and this user manual.