



Third Party Clinic

Quick Reference Guide

Version 5.3.2021

For further assistance, call the VAMS Zoom Room:

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PRIVACY NOTE

To receive the COVID-19 vaccine, personally identifiable information (PII) and protected health information (PHI) will be entered into VAMS. PII is any data that could potentially identify an individual. PHI includes demographic information and 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/php/publications/topic/hipaa.html>

How to Use the Quick Reference Guide

This manual is to be used by the Third-Party Clinics to better understand and manipulate VAMS. In this guide, you will find sets of instructions to assist you while maneuvering VAMS. If you need more assistance, a User Manual is available with more information.

Disclaimer

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Third-Party Clinic Administration

Register your Third-Party Clinic:

Activate Your User Account:	Register Your Clinic in VAMS:	Add Clinic Staff as VAMS Users
<ol style="list-style-type: none"> 1. Check your email for the link to set up your account. 2. Click the registration link in your email. 3. Verify your email address. 4. Create your password. 5. Check your email account for a verification code. 6. Enter the verification code. 7. Read the terms and conditions and check the box if you agree. 8. Click Create Account. 	<ol style="list-style-type: none"> 1. Log into VAMS. 2. You are directed to the Register Vaccination Clinic – Clinic Point of Contact page. 3. Ensure the information is correct. <ol style="list-style-type: none"> a. If any information is incorrect, update it on this page. 4. Click Next. 5. You are moved to the Register Vaccination Clinic – Clinic Information page. 6. Ensure your clinic information is correct. <ol style="list-style-type: none"> a. If any information is incorrect, update it on this page. 7. Click Next. 8. You are taken to the Register Vaccination Clinic – Review page. 9. Review all information. 10. Click the checkbox beside: By selecting this checkbox I confirm the above information is accurate. 11. Click Next. 12. Click View Portal. 13. You are then taken to the Clinic Portal main page. 	<ol style="list-style-type: none"> 1. Click the Manage Users tab. 2. Click New. 3. Add the user’s email in the Add or Update User. 4. Click Search. 5. Enter the user’s Email Address. 6. Enter the user’s First Name. 7. Enter the user’s Last Name. 8. Select the user’s Role. 9. Select the user’s Credentials. 10. Click the checkbox stating you are not a robot. 11. Click Save. 12. A registration email will be automatically sent to the user with a link for them to set up their VAMS account.

Add Third-Party Clinic Vaccine Recipients:

1. Click the **Manage Recipients** tab.
2. Click **Add Recipient**.
3. Enter the recipient's information. The recipient's address will default to the third-party clinic's address.
4. Click **Next**.
5. Enter the recipient's insurance information, if applicable.
6. Click **Next**.
7. Review the information.
8. Verify the information is correct. If not, click Previous to update the information.
9. If the information is correct, click **Next**.

Find a Recipient:

1. Click the **Other Recipients** tab.
2. Click **Find Recipient**.
3. Enter the required information.
4. Click **Search**.

Add Registered VAMS Recipient:

1. Click the **Other Recipients** tab.
2. Click **Find Recipient**.
3. Enter **First name, Last Name, Date of Birth and Gender**.
4. Click **Search**.
5. If found, click the **Add Recipient** checkbox.
6. Review the information.
7. Click **Ok**.

Edit a VAMS Clinic User:

1. Click the **Manage User** tab.
2. Select the Users Name.
3. Click **Edit**.
4. Update the information.
5. Click **Save**.

Remove a Third-Party Recipient:

1. Click the **Manage Recipients** tab.
2. Find the recipient to remove.
3. Click the drop-down arrow.
4. Click **Remove**.
5. Confirm to remove.
5. Click **Remove**.

Bulk Upload Third-Party Recipients:

1. Click the **Manage Recipients** tab.
2. Click **Import Recipients**.
3. Click on the **Recipient Import Template** link. The template will download to your computer.
4. Enter the required recipient information fields.
5. Save the template as a CSV file.
6. On the Import Recipient page, click **Upload Files**. You can also drag and drop your organization list into the Drop Files area of the page.
7. Click **Close**.
After importing a list of recipients:
 - You will receive an email, notifying you the upload was complete.
 - A log will appear on the Recipient Import page.
8. Click the **Recipient Import** tab.
9. Click **Import ID**. You will be directed to the Recipient Import page.
10. The Result Log for Bulk Upload is your uploaded file.
11. Click the **Result Log for Bulk Upload** link. Your file will open.
12. Scroll to the right until you see the status column. The status column states if the recipient was added to the system.
 - If you see an error message, there's duplicate or missing information. These recipients have not been uploaded into the system.

Access Clinic Data:

1. Log into **VAMS**.
2. Click the **Clinic Details** tab.
3. Click on a report to review.

Deactivate your Clinic:

1. Click the **Clinic Details** tab.
2. Click **Deactivate Clinic** button.
3. Confirm you want to deactivate the clinic.
4. Click **Deactivate**.

Third-Party Log Vaccination:

1. Access the recipient's record.
2. Click the **Vaccine Administration** tab.
3. Complete the pre-vaccine questions.
4. Click **Next**. You will return to the recipient's record page.
5. Click **Log Vaccination**.

<p>2D Scanner:</p> <ol style="list-style-type: none"> 6. Choose Scan UoU barcode. 7. Click Next. 8. Scan the barcode. 9. Click Next. 10. Enter the vaccine administration site. 11. Confirm the information. 12. Click Next. 	<p>Manually:</p> <ol style="list-style-type: none"> 6. Choose Enter UoU (vial) information manually. 7. Select the Manufacturer. 8. Select the Product. 9. Select the UoU (vial) lot number. 10. Click Next.
<p>Choose Yes or No if the vaccine was successful.</p>	
<p>Yes:</p> <ol style="list-style-type: none"> 13. Answer questions about waste. 14. Click Next. 	<p>No:</p> <ol style="list-style-type: none"> 11. Click Next. 12. Answer questions about the ability to reattempt. <ol style="list-style-type: none"> a. Yes – directed to Log Vaccine to restart the process. b. No – answer questions about waste. 13. Click Next.

Log Vaccinations:

1. Click **Vaccination Administration** tab.
2. Click **Log Vaccination**.
3. Click **Yes** or **No** if recipient should receive vaccine.
4. Select the **Manufacturer**.
5. Select the **Product**.
6. Select the **UoU (vial) lot number**.
7. Enter the **Expiration date**.
8. Select the administration **Site**.
9. Update the **Vaccination date**, if necessary.
10. Select **Yes** or **No** if waste occurred.
11. If **Yes**, enter **Reason for Wastage** and **Number of Doses Wasted**.
12. Click **Log Vaccine**.
13. Ensure information is correct.
14. Click **Submit**.

Export Recipients:

1. Log into **VAMS**.
2. Click **Export Recipient Data**.
3. Enter **Start date & time**.
4. Enter **End date & time**.
5. Click **Export**.

Reduce Inventory with 2D Scanner:

1. Click the **Inventory Management** tab.
2. Click **Reduce Inventory (scan)**.
3. Scan the **UoS barcode**.
4. Enter the **Reason for reduction**.
5. Enter the **Number of doses reduced**.
6. Ensure the **Manufacturer** is correct.
7. Click **Next**.
8. Ensure the information is correct.
9. Click **Finish**.

Reduce Inventory Manually:

1. Click **Inventory Management** tab.
2. Click **Manually Reduce Inventory**.
3. Enter the required fields.
4. Click **Next**.
5. Ensure the information is correct.
6. Click **Next**.
7. Click **Finish**.

Edit Recipient Information:

1. Open **VAMS**.
2. Click **Manage Recipients, Other Recipients, or Find Recipient**.
3. Choose a recipient.
4. Click **Edit**.
5. Update the information.
6. Click **Save**.

Record Vaccine Administration Outside of VAMS:

1. Click **Manage Recipients**.
2. Choose the recipient from the table.
3. Click **Vaccine Recipient**.
4. Click **Log Vaccination**.
5. Answer **Have you ever received the COVID-19 vaccine?**

If you chose **Yes**:

6. Choose the type of vaccine.
7. Enter the **Prior vaccine date**.
8. Click **Continue**.
9. Log the vaccine.

If you chose **No**:

6. Click **Continue**.
7. Review the recipient's information.
8. Log the vaccine.

Invalidate and Edit Vaccination Records

1. Click **Manage appointments**.
2. Click the **Search past vaccinations** button.
3. Enter recipient's **First Name**.
4. Enter recipient's **Last Name**.
5. Enter recipient's **Date of Birth**.
6. Click **Search**.
7. Click **View Record**.
8. Click **Vaccine Administration**.
9. Click **View Record**.
10. Click the **Edit** or **Invalidate** button.

To Edit a record:

1. Click **Edit**.
2. Update the information.
3. Click **Save**.
4. Select the **Reason for the update**.
5. Click **Save**.

To Invalidate the record:

1. Click **Invalidate Record**.
2. Select the **Reason for the invalidation**.
3. Click **Invalidate Record**.

Vaccination Bulk Upload

1. Open **VAMS**.
2. Click **Manage Recipients** tab.
3. Click **Record Past Vaccinations**.
4. Choose Import a template for bulk vaccination.
5. Click **Latest version of the Bulk Vaccination Upload Template**.
6. Click **Export Recipients**, on the VAMS screen.
7. Enter the **Start date & time**.
8. Enter the **End date & time**.
9. Click **Export**.
10. Open the **Recipient Export** excel spreadsheet.
11. **Copy** the First Name, Last Name, Date of Birth, Zip Code, VAMS ID, Dose, Vaccine Name columns from the Recipient Export file.
12. **Paste** the columns from the Recipient Export File into the VAMS Bulk Vaccine file.
13. In the **VAMS Bulk Vaccine** file, **Enter** the vaccine information.
14. Enter **Yes** or **No** if the **Pre-Vaccination**.
15. Enter **Yes** or **No** if the **Vaccine is Appropriate**.
16. Enter the **Product**.
17. Enter the **Lot Number**.
18. Enter the **Site**.
19. Enter the **Vaccination Date**.
20. Save the file as **CSV file**.
21. Return to the VAMS screen.
22. Click **Upload Files**.
23. Choose the **VAMS Bulk Vaccine CSV** file.
24. Click **Open**.

