



Standard Clinic Front Desk

User Manual

Version 5.20.2021

Table of Contents

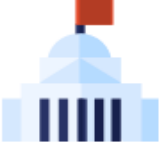
Introduction – Welcome to VAMS	3
How to Use the User Manual	4
Disclaimer	4
Your Role and Responsibilities	5
Navigating VAMS	6
Activate your User Account	7
Add a New Recipient	8
To Add a New Recipient:	8
Recipient Check-in	10
1. Verify a recipient’s appointment (2 ways):	10
2. Is the Prevacination Quesitonnaire complete?	11
3. Confirm the Recipient’s Identity	11
Edit recipient information	12
Spanish Language Options	13
Schedule a Future Appointment	14
Cancel Appointments	15
Search for an Existing Recipient	16
Shared Accounts	17
Conflicting Appointment	18
Register as a COVID-19 Vaccine Recipient	19
Access Multiple Clinics in VAMS	20
Glossary of Terms	21

Introduction – Welcome to VAMS

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

Four Portals

Each portal is designed for a specific type of user.




Jurisdiction Portal

- ◆ Register your jurisdiction
- ◆ Add organizations and clinics within your jurisdiction




Organization Portal

- ◆ Register your organization's information
- ◆ Add organization members for COVID-19 vaccination eligibility



Recipient Portal

- ◆ Register my patient information
- ◆ Schedule a COVID-19 vaccination appointment
- ◆ View my COVID-19 vaccination certificate



Clinic Portal

- ◆ Register your clinic information
- ◆ Manage vaccination appointments
- ◆ Log vaccinations

- “Organization” refers to any institution, association, company, or other group that will add critical infrastructure workers and others at-risk groups in VAMS to be considered for COVID-19 vaccination. “Member” is one example of an organization.
- Vaccination clinics are often referred to as “vaccine clinics” in VAMS.

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 User Manual

This manual is to be used by the staff that will manage recipient appointments. This manual will assist you to better understand and manipulate VAMS. In this guide, you will find step by step instructions along with images of the pages to assist you while manipulating VAMS.

Disclaimer

The content contained in WV VAMS training materials is provided only for educational and informational purposes for the clinic users in West Virginia. West Virginia attempts to ensure that content is accurate and obtained from reliable sources but does not represent it to be error-free. West Virginia does not warrant that any functions on the VAMS website will be uninterrupted, that defects will be corrected, or that the website will be free from viruses or other harmful components. Any links to third party information on the website are provided as a courtesy and do not constitute an endorsement of those materials or the third party providing them.

Your Role and Responsibilities

As the Front Desk member, you are the first person vaccine recipients see as the Front Desk staff. You will use VAMS to:

- Check in recipients,
- Create walk-in appointments, or
- Cancel appointments.

The table below illustrates the activities that only you, as the Front Desk staff, can perform in VAMS.

Responsibilities	Clinic Front Desk	Clinic Healthcare Professional	Clinic Administrator	Clinic Inventory Manager
Serve as clinic point of contact for your jurisdiction			✓	
Manage clinic information (e.g., physical address)			✓	
Set and manage clinic schedule			✓	
Manage clinic's COVID-19 vaccine inventory			✓	✓
Manage (add, edit, remove) VAMS users			✓	
Check in vaccine recipients	✓			
Create walk-in recipient appointments	✓			
Cancel recipient appointments	✓	✓		
Confirm recipient identity	✓	✓		
Administer vaccine to recipients		✓		
View dates when recipients can get their second dose of vaccine		✓		

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 devices.

To access VAMS, visit: <https://vams.cdc.gov/vaccineportal/s>

Below you will find ways to help you navigate VAMS:

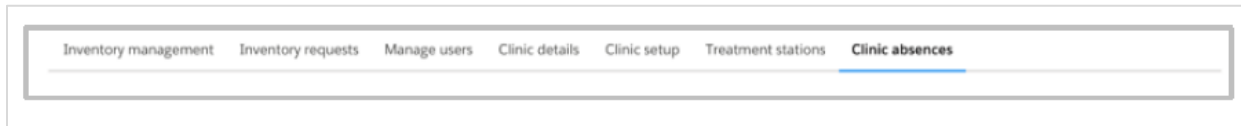
Header/Banner



Clicking the **VAMS** logo will return you to your portal’s home page. The **Help** link will take you to a list of frequently asked questions (FAQs). The arrow beside your name will drop down and allow you to **log out** of the system.

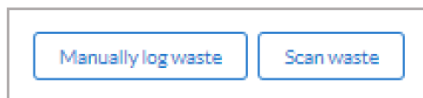
Tabs

Tabs are available at the top of the page and allow you to move between pages. The tab you are currently viewing will be underlined and bolded.



Buttons

Buttons will allow you to start, advance, and complete tasks.



Tables

Tables allow you to sort and filter information. You can view details by clicking the links in each row. You can also filter the columns by clicking on the table headers.

Product	Manufacturer	Doses Received	Doses Remaining	Date added/reconciled	Status
Moderna COVID-19 ...	Moderna US, Inc.	1000	998	Feb 5, 2021	Active
Pfizer-BioNTech Covi...	Pfizer Manufacturing ...	2500	2499	Feb 4, 2021	Active
Pfizer-BioNTech Covi...	Pfizer Manufacturing ...	1000	997	Jan 27, 2021	Active

Activate your User Account

To start this step, you will need:

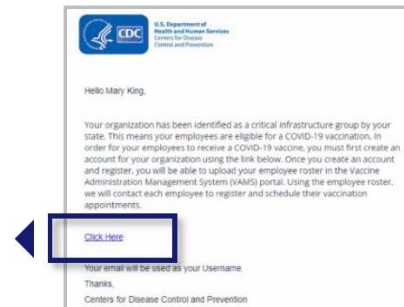
- Internet access
- Email account access
- Registration email from no-reply@mail.vams.cdc.gov

After the Jurisdiction POC enters your name and email address into VAMS, you will get an email containing a link to create a VAMS account.

➤ **Quick Tip:** Check your spam or junk folder if it is not in your inbox. If you still cannot find the email, contact your Jurisdiction POC.

1. **Check** your email for the link to set up your account.
2. **Click** the registration link in your email. You will be taken to the account creation page.

➤ **NOTE:** The registration link is for your registration only and cannot be used to register anyone else.



Once you click the link, you will be taken to a page to create a password.

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**.

Hi, Jeff. Welcome to VAMS
Please create your Account to Access the Employer Module

Your Username
696R-929-da95-469c-81ae-4969321c4277@mailskurp.com

Your password must be at least 8 characters long and include at least 3 of the following categories:

- 1 uppercase character
- 1 lowercase character
- 1 number
- 1 special character

* Create Password

* Verify Password

Please check your email for your verification code. The verification code will be valid for 15 minutes. If expired, please refresh the page to generate a new verification code.

* Verification Code
153586

Security Alert - This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes all devices/storage media attached to this system. This system is provided for Government-authorized use only. Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties. At any time, and for any lawful Government purpose, the government may monitor, record, and audit your system usage and/or intercept, search and seize any communication or data transmitted or stored on this system. Therefore, you have no reasonable expectation of privacy. Any communication or data transmitted or stored on this system may be disclosed or used for any lawful Government purpose.

By Checking this Box, I Agree to the specified terms.

Create Account

➤ **NOTE:** After five unsuccessful login attempts, you will be locked out for one hour.

CONGRATULATIONS, YOU SET UP YOUR ACCOUNT!

Add a New Recipient

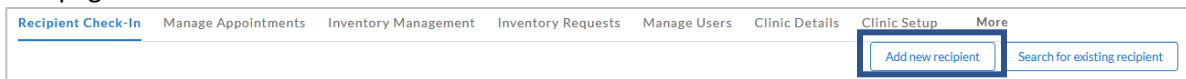
Recipients no longer need a VAMS account to be vaccinated in a standard clinic. Adding a New Recipient allows you to schedule a walk-in or future appointment for individuals who do not have accounts and gives you the option to create an account for the recipient so they can access a Recipient Portal.

When adding a new recipient into your standard clinic, you can add their email address on the demographic page. Adding their email address will prompt the recipient to create their VAMS account. The recipient will get an email and then should follow the steps to create their account.

A recipient does not need a VAMS account for you to schedule an appointment.

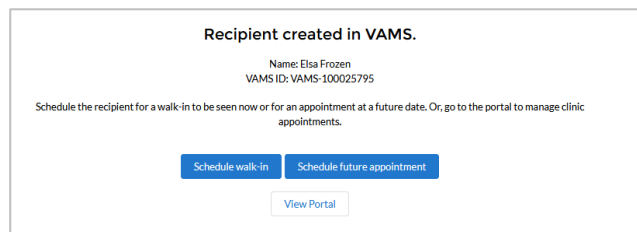
To Add a New Recipient:

1. Log into **VAMS** and access your Standard Clinic.
2. You are defaulted to the **Recipient Check-in** tab.
3. Click the **Add New Recipient** button. You are taken to the Add Recipient page.



4. Enter the recipient's required (*) and optional demographic information:
 - a. Salutation (optional)
 - b. *First Name
 - c. Middle Name (optional)
 - d. *Last Name
 - e. *Gender
 - f. *Date of Birth
 - g. *Ethnicity
 - h. *Race
 - i. Priority Group (optional)
 - j. *Home address
 - k. Email (optional)
 - l. Home phone (optional)
 - m. Cell phone (optional)
 - n. If you've entered an email address, 2 additional prompts will appear. Use the radio buttons to select the recipient's preferred communication method. Then select if you would like to create a VAMS account for the recipient.
 - o. Emergency contact name (optional)
 - p. Emergency contact number (optional)

5. Click **Next**.
6. Enter the insurance information if necessary but it's not required.
7. Click **Next**. You are taken to the **Add Recipient Review** page.
8. Review the information and if it's correct, select the **By checking this box, I confirm I have reviewed the above information with the recipient, and it is accurate.**
 - a. If you need to update any information, click **Previous** to go back and update the information.
9. Click **Finish**.
10. You are taken to the **Recipient Created in VAMS** page.
11. From here, you can choose to **Schedule a walk-in** appointment or **Schedule a future appointment** for this recipient.
12. If the recipient doesn't want a walk-in or future appointment, click the VAMS header to return to your main landing page.



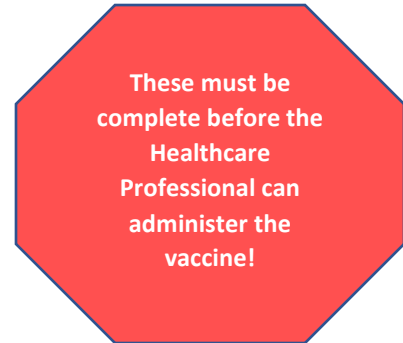
Recipient Check-in

Once you are logged into VAMS, you will be taken to the Clinic Portal home page. You will complete your daily tasks from the Clinic Portal home page.

Your main role is to check in vaccine recipients.

There are three steps to process checking in a recipient:

1. Verify the recipient’s appointment.
2. Confirm the required documentation is complete.
3. Confirm the recipient’s identity.



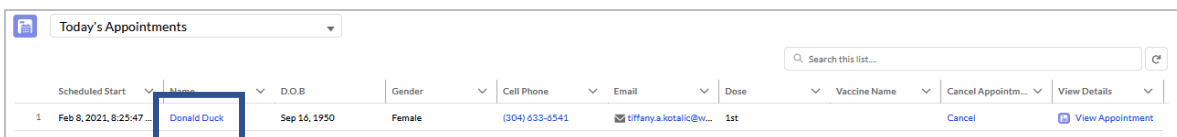
1. **Verify a recipient’s appointment (2 ways):**

Use a QR Code to Find the Recipient

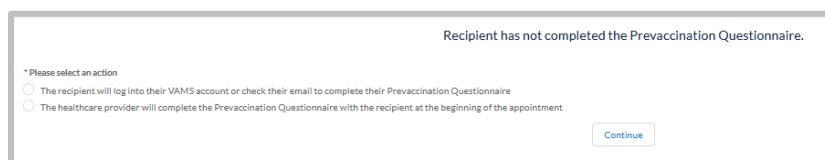
1. When the recipient schedules an appointment, they receive a QR code.
2. Use a mobile device to **scan the recipient’s QR code.**
 - If you’re logged into VAMS, you will be taken to the recipient’s appointment record.
 - If you’re not logged in to VAMS, you will be taken to the log in screen and need to log in before accessing the recipient’s information.
3. VAMS will **prompt** you to verify the recipient’s identity.
4. **Select** the recipient’s form of identity.
5. VAMS will update their status to **“Checked in.”**

Manually Find the Recipient

1. **Log in** to VAMS.
2. **Find** the recipient in the recipient table. There is three ways to find a recipient:
 1. Use the drop-down menu to filter the appointments.
 2. Click the column headers to change the order of your view.
 3. Search by entering the recipient’s name or email in the address search box.
3. Once the recipient is found, click on the recipient’s name.



4. If the recipient has not completed the Pre-vaccination questionnaire, you will be taken to a page asking if the recipient can log into their account to complete the questionnaire or if the Healthcare Provider will complete it when the recipient is with him/her. Choose either option.
5. Click **Continue.**



2. Is the Prevaccination Questionnaire complete?

Recipients will receive a notification with a link to the questionnaire before their scheduled appointment. **The recipient should complete questionnaire before receiving the vaccine.** However, the Healthcare Provider can update the status to complete when he/she is with them.

VAMS will notify you if the questionnaire is complete:

- If the questionnaire is complete, you'll see: "The Recipient has completed the Pre-vaccination Questionnaire."
- If the questionnaire is **not** complete, you'll see "Recipient has not yet completed the Pre-vaccination Questionnaire." VAMS will inform you to have the recipient log into their account and complete the questionnaire or ask if the Healthcare Provider will complete the questionnaire.

3. Confirm the Recipient's Identity

Once the appointment is confirmed and the questionnaire is verified:

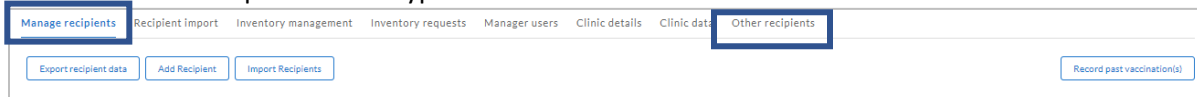
1. You will be taken to the **Validate Recipient** screen.
 - To validate a recipient, you must have:
 - The recipient's first and last name
 - Their date of birth (DOB)
 - The recipient matches their photo ID
2. Select the **form of identification**.
3. If the recipient doesn't have valid identification, click **ID required, but not provided**. VAMS will cancel their appointment and send the recipient a notification to reschedule.
4. Click **Next**.
5. The recipient's status will change to either **Checked In** or **Cancelled**.

- **NOTE:** If identification is required and isn't provided, the recipient must reschedule their appointment.

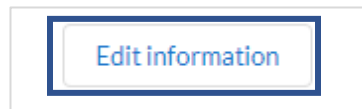
Edit recipient information

You will now be able to edit a recipient’s contact information, demographics, emergency contact, and insurance information. You can also edit the recipient’s External System ID and whether pre-vaccination actions are complete. You can now edit recipient profiles in any step of their vaccination process.

1. Open **VAMS**.
2. Click on the **Manage Recipients** or **Other Recipients** tab. Or use the **Find Recipient** button.
3. Click on a recipient’s blue hyperlinked name.



4. You will be taken to the recipient’s record.
5. Click **Edit Information**.
6. The recipient’s information fields are now editable.
7. Demographic fields will open to edit.



- **NOTE:** You can edit:
 - First Name
 - Last Name
 - Date of Birth
 - Ethnicity
 - Race
 - Pre-vaccination Question
 - Address fields
- 8. Click **Save**.
- 9. You will see a green success message.



Spanish Language Options

You can now view VAMS screens in Spanish. There's two ways to update the screen.

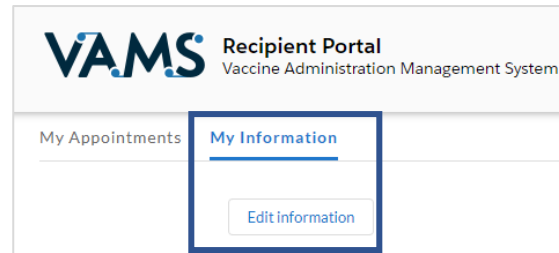
The first way to view your screen in Spanish:

1. Open **VAMS**.
2. Click on the word **Espanol** in the upper right hand corner.
3. Your screen will update to Spanish.

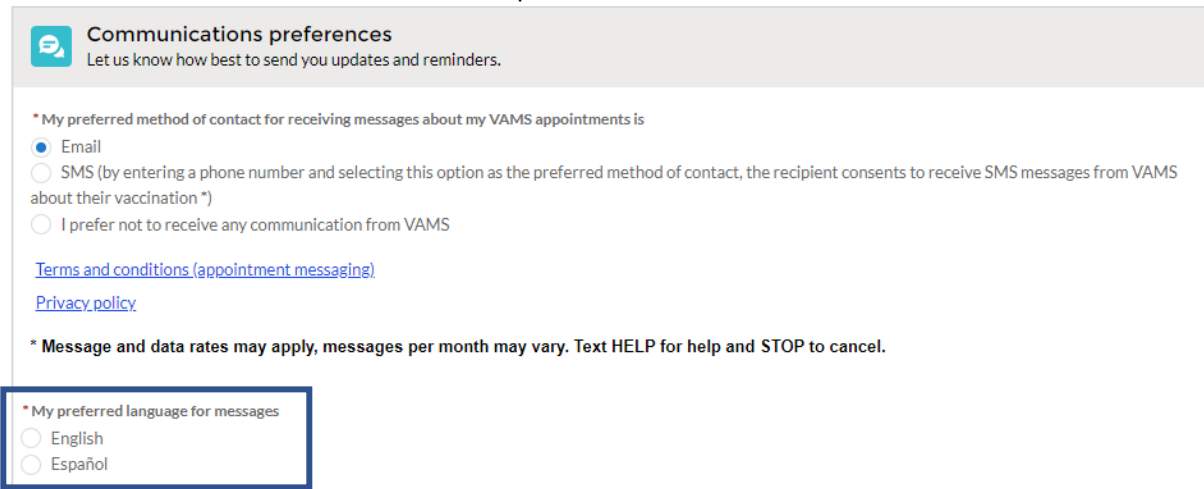


The second way to view your screens in Spanish:

1. Open **VAMS**.
2. Click on the **My Information** tab.
3. Click **Edit information**.



4. Move to the **Communication preferences** section on the screen.
5. Choose the **Espanol** button.
6. Click **Save**.
7. Your screens are now viewable in Spanish.



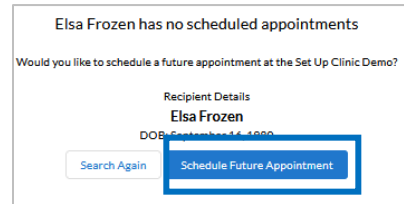
Schedule a Future Appointment

Appointments for future vaccinations can be scheduled using the **Schedule Future Appointments** button. The Schedule Future Appointments button will appear after a recipient was added or found in VAMS by using the Add New Recipient button or by Searching for Existing Recipient.

To schedule an appointment, you will first need to add or find the recipient in VAMS. See Add New Recipient or Search for Existing Recipient in the guide for additional help.

Once you add or find the recipient:

1. Click **Schedule future appointment**. You will be taken to a page stating the recipient has no appointments scheduled.
2. Click **Schedule Future Appointment**.
3. You will be directed to a **Before you schedule** page asking if the recipient has ever received the vaccination.
 - a. If you chose **No**, you will be taken to the **Schedule your 1st dose appointment** page.
 - b. If you choose **Yes**, you will be taken to the **Schedule your 2nd dose appointment** page.



Before you schedule
 We do not currently have a record of vaccination for you. Please answer the questions to schedule your appointment.

Note: This is in reference to vaccination, not to any COVID-19 testing you may have received.

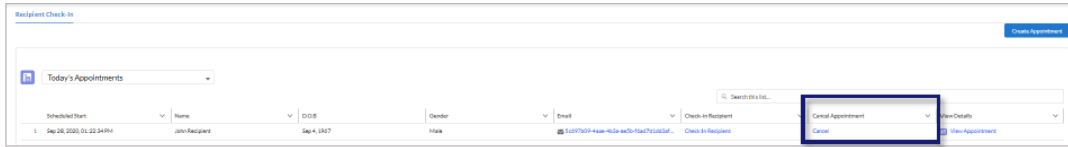
* Have you ever received a COVID-19 vaccine?
 Yes
 No

4. Available appointments will display on the page.
5. Choose an available appointment.
6. Click **Next**.
7. Review the appointment information on the screen.
8. Click **Submit**.

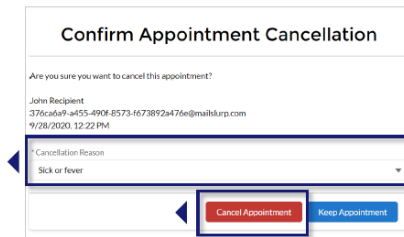
Cancel Appointments

To cancel a recipient's appointment:

1. Click **Cancel** beside the recipient's name in the Appointment's table.



2. A **Confirm Appointment Cancellation** pop-up will appear.
3. Select the **cancellation reason**.
4. Click **Cancel Appointment** or **Keep Appointment**.
5. If you canceled the appointment, a confirmation message will appear. Click **Ok**.



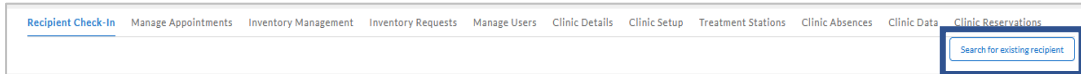
- A recipient has four hours to show for their appointment. If the recipient doesn't show, VAMS will automatically update their status to **"no-show"** and will cancel the appointment.
- Cancellations will occur once a day:
 - If appointments are cancelled before 2pm, they will appear as canceled by 6pm.
 - If appointments are canceled after 2pm they will show as canceled the following day. Cancellation emails will be sent to the recipients.

Search for an Existing Recipient

You can search, view and add recipients using the **Search for existing recipient** button. VAMS will search for all recipients, including those registered in VAMS as recipients and those added to third-party clinics. Once a recipient is found, you will be able to schedule a walk-in appointment or schedule them for a future appointment.

To search for a recipient:

1. Click the **Search for existing recipient** button. You'll be directed to the **Search for Recipient** page.



On the Search for Recipient page:

2. Or enter the recipient's **First Name, Last Name** or **Date of Birth**.
3. Click **Search**.

4. If the recipient exists, a **Search Results** table will appear below.

5. If you want to add the recipient to your clinic, click the **Schedule walk-in**.

6. When scheduling a walk-in appointment, if no prior doses are recorded in VAMS, you will be asked if the recipient received a prior dose.

If you answer **Yes**:

1. Enter the **Vaccine Manufacturer**.
2. Enter the **Date** of the first dose.
3. If the second dose is too early, you will be given a message **Are you sure you want to vaccinate early?**
4. Choose **Continue** to schedule a walk in or **Cancel** to cancel the appointment.

If you answer **No**:

1. You will be directed to the **Next Available Appointment** screen.

Shared Accounts

You will now be able to create shared accounts in VAMS. Recipients with a VAMS account will be able to add additional users to their accounts. The additional accounts will not need a phone number or email address.

1. Log into **VAMS**.
2. Click on **Add new recipient**.
3. You are taken to the **Add Recipient** page.

Recipient check-in | Manage appointments | Bulk imports | Inventory management | Inventory requests | Manage users | Clinic details | Clinic setup | More

[Add new recipient](#) [Search for existing recipient](#)

4. Choose **Yes** or **No** to Would you like to associate the new recipient with a representative, a guardian or an existing VAMS account?
5. Choosing **Yes**, will open more fields.
6. Enter the **Representative/guardian first name**.
7. Enter the **Representative/guardian last name**
8. Enter the **Representative/guardian date of birth**.
9. Complete the rest of the form as if you were entering a new recipient.

Add recipient

* Indicates that the field is required.

Representative / guardian information
Select the representative / guardian relationship to the recipient.

**Would you like to associate the new recipient with a representative, a guardian or an existing VAMS account?
 Yes
 No

* Representative / guardian first name * Representative / guardian last name Relationship to recipient (optional)
 --None--

Representative / guardian phone (optional) Representative / guardian email (optional) * Representative / guardian date of birth

To view included recipients in an account:

1. Log into **VAMS**.
2. Click **Search for existing recipient**.
3. Enter the recipient's name and information or the account holder's name and information.
4. Click **Search**.
5. Click the hyperlinked name.

You will see a **Representative/guardian information** section on the screen.

Representative / guardian information
Select the representative / guardian relationship to the recipient.

Representative / guardian first name daisy	Representative / guardian last name duck	Relationship to recipient (optional)
Representative / guardian phone	Representative / guardian email	Representative / guardian date of birth 02/20/2000

Conflicting Appointment

A recipient may have an appointment scheduled at a clinic other than yours. Complete the following steps to add the recipient to your clinic.

1. A **Conflicting Appointment** pop-up will appear.
2. Choose to **Keep** or **Cancel** the exiting appointment.
 - a. If you cancel the appointment, you will be given the opportunity to schedule a walk-in with you.

To Keep the Appointment:

1. Select **No, keep the existing appointment.**
2. Click **Submit.**

To Cancel the Appointment:

1. Select **Yes, cancel the existing appointment and reschedule a walk-in appointment.**
2. Click **Submit.**
3. A **Confirm appointment cancellation** pop-up appears.
4. Click **Cancel Appointment.**
 - a. Canceling the appointment, add the recipient to your list of appointments.
5. You are now directed to the **Appointment Confirmation** page to enter the walk-in details.

NOTE: The recipient will receive a Pre-vaccination Questionnaire and to confirm they reviewed the Emergency Use Authorization (EUA) fact sheet and Vaccine Information Statement (VIS). Both actions need to be completed before the recipient is checked in.

6. You can confirm these details or use the QR code to check the recipient in.

- **NOTE:** Walk-ins will be scheduled for the current time slot but may have to wait based on your clinic's current capacity.

Register as a COVID-19 Vaccine Recipient

To register for a vaccine, your Clinic Administer will need to add you as a member of the organization. When your Clinic Administrator adds you as a member, you will receive an email for you to register for the vaccination.

1. Click on the recipient **registration link** in your email. You will be taken to the **Welcome to VAMS** pop up.
2. Enter your **email address**.
3. Enter the **same password** you use when you log in as a user.
4. Click the box beside **I'm not a robot**.

5. Click **Login**. You will be taken to the **Portal Selection** screen.
 - **NOTE:** Every time you log into VAMS, you will be asked to verify your identity twice. After five failed attempts, you will be locked out of VAMS for one hour.

6. Click **Access Portal** below the clinical or recipient portal to complete the vaccination registration process.
 - **NOTE:** While logged into VAMS, you will be able to switch portals by clicking the drop-down arrow next to your name in the upper right corner and then select **Switch Portals**.

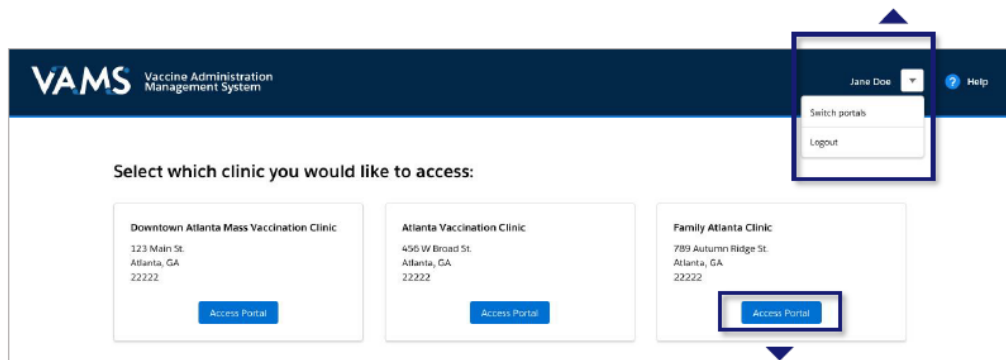
Access Multiple Clinics in VAMS

If the Clinic Administrator adds you as a user at their clinic, you can access the other clinics once you have logged into VAMS.

1. On any page in VAMS, click on the **drop-down arrow** next to your name in the upper right-hand side of the screen.
2. Click **Switch Portals**.

If you have multi-user access, you will be taken to the portal selection page.

3. You will be taken to the **Clinic Selection** page.
4. Select the **Access Portal** button of the clinic you would like to access.



Glossary of Terms

Word/Phrase	Definition
2D Barcode	A two-dimensional barcode that stores information vertically and horizontally. It may contain vaccine product identification information, lot number, and expiration date.
Member	Any worker, staff member, volunteer, other personnel or organization being added to VAMS to receive COVID-19 vaccine.
Mobile Clinic	A clinic that moves to multiple locations for vaccination (e.g., 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 accounts within the clinic portal.
Multi-user	A VAMS user with access to multiple VAMS portals (e.g., a clinic administrator who is 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 to VAMS.
Pop-Up Clinic	A temporary clinic that has one permanent location (e.g., 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 vials.
Vaccine Clinic	A clinic administering COVID-19 vaccine (sometimes referred to as a ‘vaccine clinic’ in VAMS and their user manual).