



Standard Clinic – Healthcare Professional

User Manual

Version 7.6.2021

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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/phlp/publications/topic/hipaa.html>

How to Use the User Manual

This manual is to be used by the Healthcare Professionals 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

Your role in VAMS is critical to ensure recipient vaccinations are successful. As a Healthcare Professional, you use VAMS to manage the administration of vaccines for recipients. You will be able to cancel appointments, review recipient information, log vaccinations and view future doses for recipients.

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

Responsibilities	Clinic Healthcare Professional	Clinic Administrator	Clinic Inventory Manager	Clinic Front Desk
Serve as the clinic point of contact for your jurisdiction		✓		
Manage clinic information (e.g., physical address)		✓		
Set and manage clinic schedule		✓		
Manage clinic COVID-19 vaccine inventory		✓	✓	
Manage (add, edit, remove) VAMS users		✓		
Check in vaccine recipients				✓
Create walk-in recipients' appointments				✓
Cancel recipients' appointments	✓			✓
Confirm recipients' identity	✓			✓
Access and review recipients' records (name, date of birth [DOB], medical history, known allergies, etc.); add notes to record (if applicable)	✓			
Log vaccination (vaccine information, outcome, and waste, if applicable)	✓			
View dates when recipients can get their second doses	✓			

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:

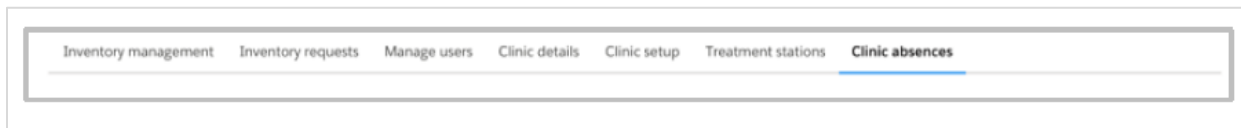
Header/Banner



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.

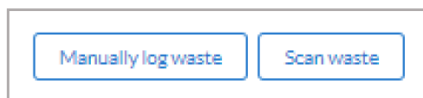
Tabs

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

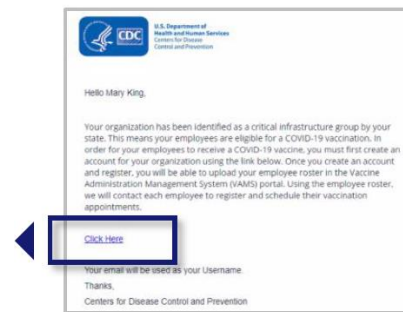
To start this step, you will need:

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

After the Clinic Administrator 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 Clinic Administrator.

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**.

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

View and Manage Scheduled Appointments

You have access to view and cancel the recipient's appointments.

To View Scheduled Appointments:

1. Log into **VAMS**.
2. Click on the **Manage Appointments** tab.
3. On the screen, you'll see a box that says **Today's Checked In Appointments**. If you click the drop-down arrow beside the box, you will see **Prior Checked In Appointment**.
- **Today's Checked In Appointments** are recipient appointments that are checked in waiting for their vaccinations for that day.
- **Prior Checked in Appointment** will show you checked in appointments yesterday.

The screenshot shows the 'Manage Appointments' tab selected. A dropdown menu is open for 'Today's Checked In Appointments'. Below the dropdown is a table with columns: Scheduled Start, Name, D.O.B, Gender, Email, Observation?, Dose, Vaccine Name, Source, and Cancel Appointment. The first row shows an appointment for 'Kiska Dog' on Jan 27, 2021, at 1:20:00, with a 'Cancel' link in the 'Cancel Appointment' column.

Cancel Appointments

To cancel appointments:

1. Log into **VAMS**.
2. Click the **Manage Appointments** tab.
3. Locate the recipient that needs their appointment cancelled.
4. On the right side of the screen, you'll see a **Cancel Appointment** column.
5. Click **Cancel** for the recipient to cancel the appointment.

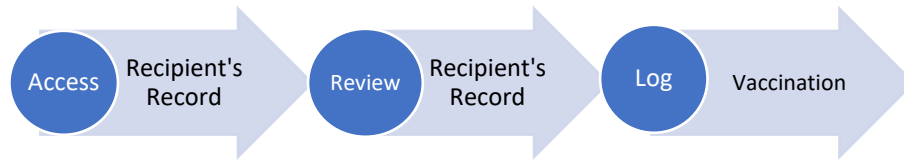
This screenshot is similar to the previous one, but the 'Cancel Appointment' column header is highlighted with a blue box. The 'Cancel' link in the first row is also highlighted with a blue box.

6. A **Confirm Appointment Cancellation** page will appear.
7. Use the drop-down menu to select the reason for the cancellation.

The screenshot shows the 'Confirm Appointment Cancellation' page. It asks 'Are you sure you want to cancel this appointment?' and displays details for 'Kiska Dog' (tiffanya.kotalic@wv.gov, 1/27/2021, 1:20 PM). There is a text field for 'Cancellation Reason'. At the bottom, there are two buttons: 'Cancel Appointment' (highlighted with a blue box) and 'Keep Appointment'.

8. Click **Cancel Appointment**. A confirmation page will appear.
9. Click **OK** to return to the home page.
10. Click **Keep Appointment**, if you don't wish to cancel the appointment.

Vaccine Administration



There are 3 steps to administering a vaccination. Below are the detailed instructions to help you log vaccinations.

Access the Recipient's Record

You will need:

Recipient's name or email address

1. Log into **VAMS**.
2. Click on the **Manage Appointments** tab.
3. Locate the **recipient** in the Checked-in Recipient table.
4. Click on the **recipient's name**.

Scheduled Start	Name	D.O.B	Gender	Email	Observation?	Dose	Vaccine Name	Source	Cancel Appointment
Jan 27, 2021, 2:37:07...	Kiska Dog	May 25, 1950	Female	tiffany.a.kotalic@w...	YES	1st			Cancel

5. A pop-up will appear **"Have you verified this is the correct recipient?"**
6. Verify you are vaccinating the correct recipient by their name and date of birthdate.
7. Select **Yes**. You will be taken to the Recipient's record.
8. Select **No**, you will be returned to the Manage Appointments tab.
9. Click **Next**.

Verification of Recipient

* Have you verified this is the correct Recipient?

☐ Yes

☐ No

Next

Review the Recipient's Record

After you have confirmed you are vaccinating the correct recipient, you will either be taken to the Notes page alerting you to complete more paperwork or you will be taken directly to the recipients record.

1. If the recipient has not completed the pre-vaccination questionnaire, choose to **Start Pre-vaccination Questionnaire in VAMS** or **Record that Pre-vaccination Questionnaire was completed outside of VAMS**.

Notes (0)

⚠ Based on the vaccination recipient's reported information, please review medical information before vaccination administration.
⚠ Recipient has yet to complete Prevaccination Questionnaire. It has been resent to the Recipient.

Prevaccination Questionnaire Recipient Details Insurance Vaccine Administration

Recipient has not completed the Prevaccination Questionnaire.
A completed Prevaccination Questionnaire is required before administering a vaccine.
A healthcare provider can also fill out the Prevaccination Questionnaire for the recipient at the beginning of an appointment.

Start Prevaccination Questionnaire in VAMS
Record that Prevaccination Questionnaire was completed outside of VAMS

2. Click **Start Pre-vaccination Questionnaire** or **Record that Pre-vaccination Questionnaire was completed outside of VAMS**.
3. If you choose Start Pre-vaccination Questionnaire, you will be taken to the Pre-vaccination questionnaire page.
4. **Complete** all the questions.
5. Click **Next**.
6. You will be directed to the recipient's record page.

VAMS Clinic Portal
Vaccine Administration Management System

Set Up Clinic Help

Recipient: Kiska Dog

VAMS Date Of Birth: 5/25/1990 Gender: Female

Notes (0)

⚠ Based on the vaccination recipient's reported information, please review medical information before vaccination administration.
✅ Recipient has completed their Prevaccination Questionnaire

Prevaccination Questionnaire Recipient Details Medical Information Vaccine Administration

You will see:

- **Recipient details.** This will include the recipient's name date of birth, and gender.
- **Next dose information.** This will notify you when the recipient is eligible for their next dose or you can see the vaccine certificate.
- **Insurance.** The recipient's insurance information will appear in this tab if it was provided.
- **Notes.** You can log details that may be helpful to another healthcare provider in the future.
To log a note, click **New Note**, enter your note, and click **Done**.
 - All notes will be visible to other healthcare providers who access the recipient's record.
 - To delete a note, open the note, click the delete button on the bottom of the note pop-up.
- **Information tabs.** You should review these before administering the vaccine.

- Pre-vaccination Questionnaire provides information such as allergies, health status, questionnaire.
- **Recipient Details:** the recipient's demographic information.
- **Medical Information:** lists medications, health conditions, allergies, and insurance information.
- **Vaccine Administration:** COVID-19 Vaccine history.
- **NOTE:** You will be able to answer and edit previously completed pre-vaccination questionnaires. Click Edit Responses to complete these actions. After completing their edits, click Submit to accept changes and return to the recipient record or click Cancel to revert changes and return to the recipient record.

Log Vaccinations

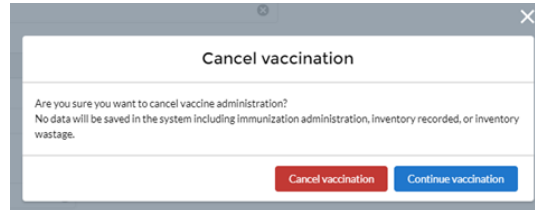
You are now ready to administer the COVID-19 vaccination.

1. Click the **Vaccine Administration** tab.
2. Click **Log Vaccination**.

3. You are taken to the **Enter Vaccination Details** page.
4. Ensure the recipient's information is correct at the top of the screen.

5. Select **Yes** or **No** to indicate if the recipient should receive the vaccine.
6. Use the drop down menu to select the **Manufacturer**.
7. Use the drop down menu to select the **Product**.
8. The next drop down field will be dependent upon the inventory of the manufacturer you selected. Select the **UoU (vial) lot number**.
9. Enter the **Expiration Date**.
10. Use the drop down to select the **Vaccine administration site**.
11. The vaccination date will default to the current date. However, you able to change it.
12. Select **Yes** or **No** to indicate if any waste occurred during the vaccination.

- If you select **Yes**, enter the **Reason for the Wastage** and the **Number of Doses Wasted**.
- 13. Click **Log Vaccine**.
- 14. Ensure the information is correct.
- 15. Click **Submit**.
- **NOTE:** If you exit a vaccination flow early, you will get a notification asking to verify the vaccination cancellation.



Record Past Vaccinations

You can record vaccinations administered by yourself and other professionals. To record vaccinations in the past:

1. Log into **VAMS**.
2. Click the **Record Past Vaccinations** button. You will be taken to the Search for healthcare administrator page.
3. Enter the **email address** of the healthcare provider that administered the past vaccinations.
4. Click **Search**. You will be taken to the Healthcare administrator search results page.

5. You will see the name and roles of the healthcare provider. Click **Record Vaccinations**.

6. You will be taken to **Choose recipient and enter vaccination details** page.
7. Enter the recipient's name.
 - **NOTE:** the recipient must have an appointment scheduled to record past vaccines.

Choose recipient and enter vaccination details

Vaccine administered by
Front Desk

Recipient name

* Selected recipient
No recipient selected

Cancel Done

8. The recipient's details will display at the bottom of the page.
9. Choose **Yes** or **No** to indicate if the Pre-vaccination questionnaire was complete.
 - **Note:** if you choose No, you will get an error message stating **Vaccinations cannot be recorded in VAMS without record of pre=vaccination questionnaire.**
10. If you choose **Yes**, fields will appear on the page.

* Has the Prevaccination Questionnaire been completed outside of VAMS?
 Note: Confirmation of Prevaccination Questionnaire is required to record vaccine administration

☒ Yes
☐ No

* Manufacturer
 Moderna US, Inc.

* Product
 Moderna COVID-19 Vaccine

UoU (vial) lot number
 123

* Expiration date
 Jul 31, 2021

* Site
 Left Deltoid

* Vaccination date
 Date: Feb 4, 2021 Time: 10:31 AM

Cancel Done

11. Select the **Manufacturer**.
12. Select the **Product**.
13. Enter the **Vial lot number**.
14. Choose the **Expiration Date**.
15. Enter the vaccination **Site**.
16. Enter the **Date** of the vaccination
17. Enter the **Time** of the vaccination.
18. Click **Done**.
19. You will get a validation page stating the vaccination recording was successful.

Vaccination recording successful

View Portal Record additional vaccinations

Vaccination Bulk Upload

You can now bulk upload vaccinations that occurred at your clinic but were not recorded at the time of the vaccination. You can only bulk upload vaccinations for recipients already added to your clinic who have a scheduled, checked-in, or cancelled “no show” appointment.

1. Open **VAMS**.
2. Click on the **Manage appointments** tab.
3. Click on the **Record past vaccinations** button.

4. You will be taken to the **Record past vaccinations** page.
5. Click the **Import a template for bulk vaccination** button.

6. When you click the Import a template for bulk upload vaccination, instructions to complete the process appear at the bottom of the screen.
7. Click the blue link, **Latest version of the Bulk Vaccination Upload Template**.

8. An excel spreadsheet opens.
9. Click the blue link, **Export Recipients**, on the VAMS screen.
10. An **Export Recipient Data** pop up appears.
11. Enter the **Start date & time**.
12. Enter the **End date & time**.
13. Click **Export**.
14. A **Recipient Export** excel spreadsheet will appear.

15. Open the **Recipient Export** excel spreadsheet.
16. You will see the recipients associated with the dates and times you specified.
17. **Copy** the recipients from the Recipients Export excel spreadsheet.
 - **NOTE:** The spreadsheet headers are not in the same order for both sheets. The below fields are to be copied from the Recipient Export file onto the VAMS Bulk Vaccination file:
 - First Name
 - Last Name
 - Date of Birth
 - Zip Code
 - VAMS ID
 - Dose
 - Vaccine Name
 - **NOTE:** You will need to ensure the columns from the Recipient Export file line up with the VAMS Bulk Vaccine file. If the columns are not aligned, the file will not upload into VAMS.
18. **Paste** the columns from the Recipient Export File into the VAMS Bulk Vaccine file.
19. Once you have your columns added to the **VAMS Bulk Vaccine** file, enter the vaccine information in the columns after the recipient information.
20. Enter **Yes** or **No** if the **Pre-Vaccination** actions were complete
21. Enter **Yes** or **No** if the **Vaccine is Appropriate**.
22. Enter the **Product**.
23. Enter the **Lot Number**.
24. Enter the **Site** the vaccine was placed on the recipient's body.
25. Enter the **Vaccination Date**.
26. Save the file as **CSV file**.
27. Return to the VAMS screen.

28. Click **Upload Files**.
29. Choose the **VAMS Bulk Vaccine CSV** file.
30. Click **Open**.
31. You will see a green success message if the file is uploaded properly.
32. You can view your upload by clicking the VAMS header to return to your home screen.
33. Click **Bulk imports**.
34. Click on the blue hyperlink to view the report.

*How would you like to record past vaccinations?

☐ Record individually within VAMS

☒ Import a template for bulk vaccination

Bulk upload past vaccinations

Follow the steps below to use a spreadsheet template and import multiple vaccinations at once.

Step 1: Download the [latest version of the Bulk Vaccination Upload Template \(version 1.0\)](#).

Step 2: [Export recipients](#) you'd like to record vaccinations for.

Step 3: Copy and past the contents of the recipient export file into the Bulk Vaccination Upload Template.

- Please **do not change** any formatting or headers in the bulk upload template.
- All columns with * are **mandatory fields** (e.g. Email*).
- Any columns with **dropdowns** cannot have a custom value (e.g. Salutation).
- Save as a **CSV UTF-8 (Comma delimited) (.csv)** file before uploading.
- Please note that VAMS **cannot import more than 9,999 records**.
- If you need to upload more than 9,999 records, please **break the records in separate import files**.

Step 4: Upload the populated Bulk Vaccination Upload Template into VAMS.


Please upload a CSV UTF-8 (Comma delimited) (.csv) file

VAMS Clinic Portal
Vaccine Administration Management System

Roundtable Third Party Clinic

Your portal for appointments and operations.

[Manage recipients](#) **[Bulk imports](#)** [Inventory management](#) [Inventory requests](#) [Ma](#)



Name	Birth Date	Gender	Cell Phone	Email

Invalidate and edit vaccination records

You will now be able to search edit and invalidate a recipient's past vaccinations.

1. Open **VAMS**.
2. Click on the **Manage appointments** tab.
3. Click on the **Search past vaccinations** button.

The screenshot shows the 'Manage appointments' tab selected in the top navigation bar. Below it, the 'Search past vaccinations' button is highlighted with a blue box.

4. You will be taken to the **Search for recipient immunization** page.
5. Enter the recipient's **First Name**.
6. Enter the recipient's **Last Name**.
7. Enter the recipient's **Date of Birth**.
8. Click **Search**.

The screenshot shows the 'Search for recipient immunization' page. It has a title 'Search for recipient immunization' and a subtitle 'Enter the required information to search for a recipient immunization.' Below this, it says 'Enter ONE of the following fields to search for a recipient immunization:' and provides input fields for 'Email' and 'VAMS ID'. Below that, it says 'Or, enter all of the following:' and provides input fields for 'First name', 'Last name', and 'Date of birth'. At the bottom, there are three buttons: 'Back to portal', 'Clear Search', and 'Search'.

9. If the recipient exists, Search results will appear at the bottom of the screen.
10. Click **View Record** to access the recipients record.

The screenshot shows the 'Search results' table. The table has columns: Name, DOB, Date administe..., Product, Manufactu..., UoU (vial), lot number, Exp. date, Site, and Action. The first row of data shows: Donald Duck, September 16, ..., February 04, 2..., Moderna COVL..., Moderna US, Inc., 8077727310, 123, 7/2021, Left Deltoid. The 'View record' button in the Action column is highlighted with a blue box.

11. You are taken to the Recipient's record.
 - **NOTE:** The recipient will have one record for each vaccination he/she received at your clinic.
12. Click on the **Vaccine Administration** tab.
13. Click **View Record** of the vaccine you wish to access.

The screenshot shows the 'Vaccine Administration' tab selected in the top navigation bar. Below it, the 'Vaccines Administered (1)' section is visible. It contains a table with columns: Date Administer..., Product, Manufacturer, Dose, Lot Number, Exp.Date, Clinic, and Action. The first row of data shows: 1, 2/4/2021, Moderna COVID-19..., Moderna US, Inc., .5 mL, 123, 7/2021, Set Up Clinic Demo. The 'View record' button in the Action column is highlighted with a blue box.

14. You are taken to the **Vaccination Record** page. On this page, you will find the recipient's vaccination information.
15. On this page you have the option to **Edit**, **Invalidate** or **Update** the vaccine record.

Vaccination record

[Edit record](#)
[Invalidate record](#)

Edits to vaccination records will not adjust inventory totals. Please manually update inventory totals if necessary.

Recipient Name

Donald Duck

Date administered

Feb 4, 2021

Manufacturer

Moderna US, Inc.

Product

Moderna COVID-19 Vaccine

UoU (vial) lot number

123

Exp. date

Jul 31, 2021

Site

Left Deltoid

Vaccination change history

Date updated	Updated by	Date administered	Product	Manufacturer	UoU (vial) number	Exp. date	Site	Reason
--------------	------------	-------------------	---------	--------------	-------------------	-----------	------	--------

To Edit a record:

1. Click **Edit**.
2. Update any field of the vaccination.
3. Click **Save**.
4. Select the **Reason for the update**.
5. Click **Save**.
6. You will be taken back to the **Vaccination Record** page.
7. You will see the **Vaccination change history** table at the bottom of the screen with the changed information.
 - Any updates made to the record will update the recipients account and vaccination certificate.

To Invalidate a record:

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

- **NOTE:** Editing a recipient's vaccination record will automatically adjust the inventory for your clinic.

Third-Party Clinic Administration

A third-party clinic is a clinic established in an existing facility such as a long term care facility, nursing home or correctional facility to facilitate COVID-19 vaccinations for recipients who reside in those facilities. The information presented here is only relevant to healthcare professionals to third-party clinics.

The next pages will provide information on the following topics:

- Key Differences Between Standard, Mobile Clinics, and Third-Party Clinics
- Third-Party Clinic Users
- Add Third-Party Recipients in VAMS
- Remove a Recipient
- Find a Recipient

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

Standard Clinic	Third- Party Clinic
<ul style="list-style-type: none"> ➤ Healthcare setting providing outpatient care with one permanent location for vaccination. ➤ 4 roles: Clinic Administrators, Inventory Managers, Front Desk Personnel, and Healthcare Professionals. ➤ Schedules are utilized in VAMS. ➤ Vaccine recipients use VAMS. ➤ Vaccine recipients received reminders from VAMS. 	<ul style="list-style-type: none"> ➤ Existing facility set to provide vaccines to housed recipients. ➤ 2 Roles: Clinic Administrators and Healthcare professionals. ➤ No schedule is established. ➤ Vaccine recipients do not use VAMS. ➤ Third-party clinics do not appear in the search results. ➤ Third-party clinic administrators and/or healthcare professionals track vaccine recipients next dose eligibility.

Third-Party Add Vaccine Recipients

Third-party recipients will not be creating their own VAMS accounts nor will they be recording their medical histories. You will need to add them to VAMS.

The following information will need to be obtained to enter them into VAMS:

- | | |
|--|---|
| <ul style="list-style-type: none"> • First name • Last Name • Gender • Ethnicity • Race • Insurance information (if applicable) • Medications (if applicable) • Other relevant medical information (if applicable) | <ul style="list-style-type: none"> • Pre-vaccination actions: <ul style="list-style-type: none"> • Screening for contraindication • Providing Emergency Use Authorization (EUA) • Fact Sheet or Vaccine Information Sheet (VIS) • Acquiring authorization |
|--|---|

There are 2 ways to add recipients to VAMS. You can manually enter each recipient's information, or you can upload them at once, known as a bulk upload.

Add Third-Party Clinic Recipients One at a Time:

1. Click on the **Manage Recipients** tab.
2. Click **Add Recipient**. You will be taken to the Add Recipients page.
3. Enter the **recipient's information**. The recipient's home 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**.

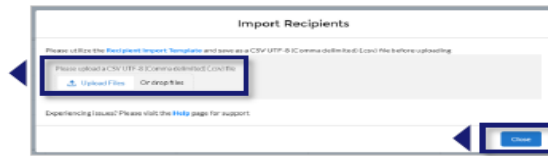
The recipient's record is saved!

Third-Party Bulk Upload Recipients

You will be able to upload numerous recipients at once by adding their information into a spreadsheet and then uploading it into VAMS.

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. They are designated by an asterisk.

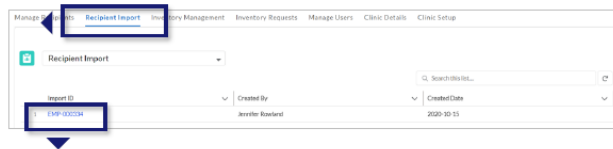
5. **Save the template as a CSV file.**
6. On the **Import Recipient** page, click **Upload Files**. You can also drag and drop your organization list into the **Drop Files** area of the page.
7. Click **Close**.



After importing a list of recipients:

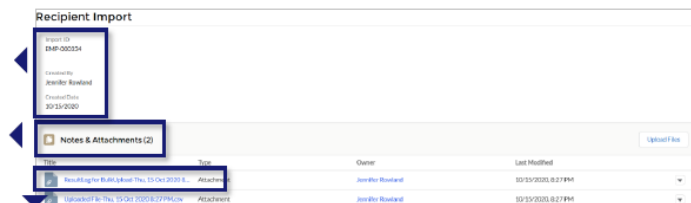
- A message appears stating your list is in the que to upload.
- You will receive and email, notifying you the upload was complete.
- A log will appear on the **Recipient Import** page.

8. Click on the **Recipient Import** tab.



On the **Recipient Import** page, you will see information about your upload, including the system-generated import ID number. The import ID number is the number associated to the person who imported the list.

9. Click the **Import ID**. You will be directed to the Recipient Import page.
 - The **Import details** section has the Import ID, jurisdiction name, created by and created date.
 - The **Notes and Attachments** table includes two files: a **Result for Bulk Upload** and the recipient import file you uploaded.



The **Result Log for Bulk Upload** is your uploaded file.

10. Click the **Result Log for Bulk Upload** link. Your file will open.

11. 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.
- If you see **Success**, the recipients were uploaded into the system correctly.

	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@ma	email already exists in the system					
4	FNU	LNU	Inufnu@	email already exists in the system					
5									
6									
7									

Third-Party Remove a Recipient

Clinic Administrators and Healthcare Professionals can remove a third-party recipient. To remove a recipient:

1. Click on the **Manage Recipients** tab.
2. Find the recipient you wish to remove in your **Manage Recipients** table.
3. Click the arrow located at the far right of their name.

The screenshot shows the 'Manage Recipients' tab selected in the top navigation bar. Below the navigation bar, there are buttons for 'Add Recipient' and 'Import Recipients'. A search bar is present with the text 'Search this list...'. Below the search bar is a table with columns: Name, Birth Date, Gender, Prevaccination act..., vaccine status, FollowUp Vaccination..., and Prior Vaccine Name. The first row of the table contains the data: 'Kiska Cat', 'May 2, 1950', 'Female', 'Yes', '0 / 0 received'. A dropdown arrow is visible at the end of the 'Kiska Cat' name.

4. Choose **Remove**.

This screenshot is a closer view of the table from the previous screenshot. The dropdown menu for the 'Kiska Cat' name is open, and the 'Remove' option is highlighted.

5. A **Warning** pop-up will appear asking if you want to remove the recipient.
6. Click **Remove** to remove the recipient or,
7. Click **Cancel** to keep the recipient in your third-party clinic.

The screenshot shows a 'Warning' dialog box. The text inside reads: 'Are you sure you want to remove recipient?'. Below this, it displays the recipient's details: 'Name: Kiska Cat' and 'DOB: May 2, 1950'. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Remove'.

Third-Party Find a Recipient

You can search, view, and add recipients using the **Other Recipients** tab. VAMS will search for all recipients, including those registered in VAMS as recipients and those added to other third-party clinics. To search for a recipient:

1. Click on the **Other Recipients** tab.

2. Click **Find Recipient**. You'll be directed to the Search for Recipient page.

On the **Search for Recipient** page,

3. Enter the recipient's **First Name**.
4. Enter the recipient's **Last Name**.
5. Enter the recipient's **Date of Birth**.
6. Enter the recipient's **Gender**.
7. Click **Search**.

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

First Name	Last Name	DOB	Gender	Cell phone	Email	Third party re...	Covid 19 v...	Next covid 19...	Vaccine ty...
<input checked="" type="checkbox"/>	Tiffny	Smith	September 16, ...	Female		✓			

9. If you want to add the recipient to your clinic, click in the **check box**.
10. Click **Add Recipient** to add the recipient to your clinic.

Third-Party Clinic Covid-19 Vaccine Administration

To administer vaccines to third party recipients, you'll follow the same process as in Vaccine Administration with two additional activities:

- Recording the recipient's pre-vaccination actions
- Tracking the recipient's second dose eligibility date

Record the recipient's pre-vaccination actions:

1. Log into **VAMS**.
2. Click **Manage Recipients**.
3. Find the recipient.
4. Click the recipient's name. You'll be taken to recipient's record.
5. You will see an alert if the pre-vaccination were not completed.
6. Click **Edit Recipient Details** to update the pre-vaccination information. You'll be taken to the **Recipient Information** page.
7. Scroll down the page to the **Have Pre-vaccination actions been completed?** field.
8. Select your response using the drop-down arrow.
9. Click **Next**.

⚠ Prevacation actions have not been completed. COVID-19 vaccine administration cannot be performed without a record of Prevaccination actions.

Notes (0)

Recipient Details Medical Information Vaccine Administration

[Edit Recipient Details](#)

Track Second Dose Dates

1. Log into **VAMS**.
2. Click Manage Recipients.
3. You will see a list of recipients who have been added in VAMS.
4. You will see a column for **COVID-19 Status** and **Next COVID-19 eligible date**.

Search this list...									
Name	Birth Date	Gender	Cell Phone	Email	Prevaccination a...	Vaccine status	Follow-up vaccinatio...	Vaccine name	External System ...
1. Lewis Capaldi	January 28, 1950	Other			No	0 / 0 received			
2. Tiffany Smith	September 16, 1980	Female			Yes	1 / 2 received	Feb 25, 2021	Moderna COVID-19 ...	

Access Multiple Clinics in VAMS

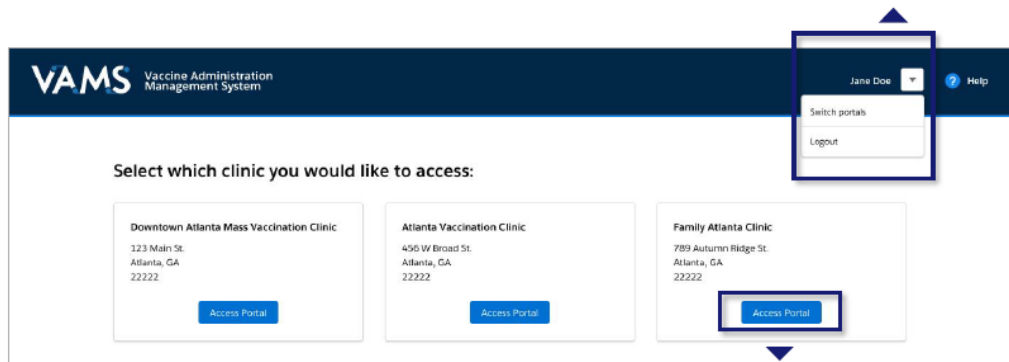
If the Clinic Administrator adds you as a user at their clinic, you can access the other clinics once you have logged into VAMS.

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.

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

If you have multi-clinic access, if you click **Switch Portals**, you will be taken to the **Clinic Selection** page.



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.
.csv	A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values.
Emergency Use Authorization (EUA) Fact Sheet	A document produced by the vaccine manufacturer that informs vaccine recipients or their parents or legal representatives about the benefits and risks of a vaccine they are receiving.
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-Portal 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.
Pre-vaccination Questionnaire	Questionnaire recipients must complete prior to receiving vaccine. Healthcare professionals will review this information to ensure there are no contraindications or precautions present before administering a vaccine.
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.
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).
Vaccination Series	A series of vaccinations, including the timing of all doses, which may be either recommended or compulsory (e.g., there are two vaccine doses that must be administered with an appropriate time interval between them for COVID-19 vaccination series to be complete).