

User Manual

Jurisdiction Point of Contact (POC)

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Welcome to VAMS

The Vaccine Administration Management System (VAMS) is an easy-to-use, secure, online tool to manage vaccine administration from the time the vaccine arrives at a clinic to when it is administered to a recipient. VAMS is free for public-health-approved clinics, and can be used on computers, tablets, and other mobile devices. It is not a smartphone app, and no installation or download is required for this web-based platform. It supports operations as well as vaccine inventory and administration data collection and tracking for analysis and reporting.

VAMS Portals | Each of the four portals were designed with end users in mind.



Jurisdiction Portal

Jurisdiction Portal users can use VAMS to:

- Designate specific organizations that serve priority groups (including volunteers) for initial allocation.
- 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.



Clinic Portal

Clinic Portal users can use VAMS to:

- Register their clinic location and add clinic staff as users.
- Set up their clinic schedule with ability to cancel, modify, and/or change recipient appointments (*standard and mobile clinics only*).
- Document and track COVID-19 vaccine administration and waste.
- Monitor vaccine inventory levels.
- View clinic-level reports.



Organization Portal

Organization* Portal users can use VAMS to:

- Add priority group members to VAMS 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

Recipient Portal users** who receive vaccine at a standard or mobile clinic and can use VAMS to:

- Register their account online or using a mobile device.
- Locate a clinic and schedule or cancel vaccination appointments.
- Receive notifications about upcoming appointments or documents for the day of vaccination.
- Schedule and track follow-up vaccination appointments (*if applicable*).
- Receive proof of vaccination.

NOTE: Vaccine recipients at third-party clinics will not use VAMS at all.

*"Organization" refers to any institution, association, company, or other group that identifies and adds members (individuals eligible for COVID-19 vaccine) in VAMS.

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



Your Role and Activities in VAMS

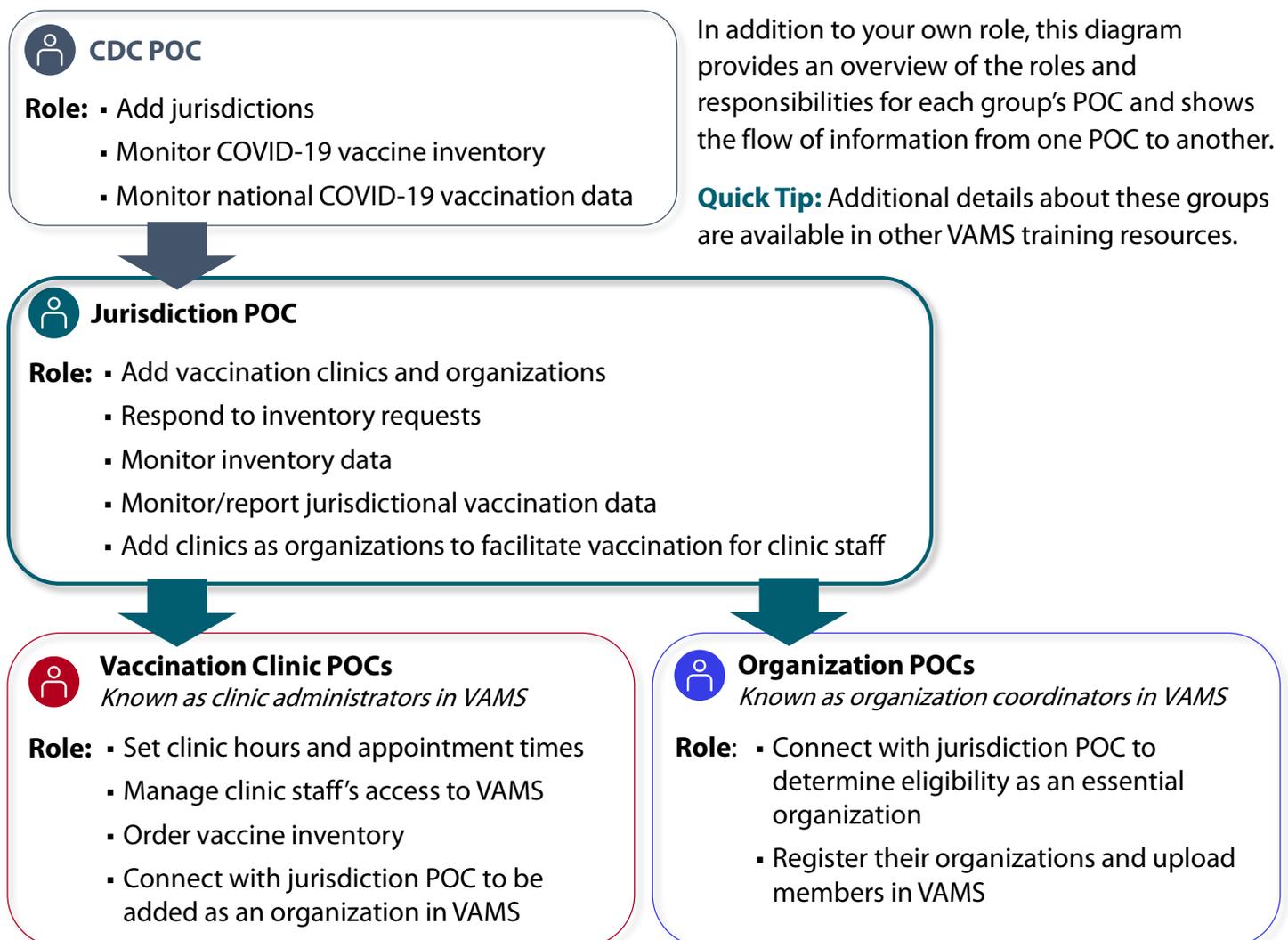
As a **jurisdiction POC**, VAMS serves as your primary tool for managing critical functions and oversight of COVID-19 vaccine distribution to clinics in your jurisdiction and enables you to:

- Collect accurate, near real-time, de-identified, record-level data on COVID-19 vaccine administration consistently across your jurisdiction, avoiding variations in data quality and availability.
- Track and monitor vaccine administration.
- Promote real-time awareness of all of the above.

Below are additional details about your role as well as the three groups you will interact with during the ongoing COVID-19 vaccination efforts.

- Centers for Disease Control and Prevention (CDC).
- Vaccination clinics who will administer the COVID-19 vaccines in your jurisdiction.
- Organizations of priority group workers (including volunteers) in your jurisdiction.

You likely already have a CDC point of contact (POC). However, vaccination clinics and organizations need to select someone in their organization to be your POC.





Jurisdiction POC User Manual

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 you should be aware of.
Quick Tip:	Quick Tips are good-to-know pieces of information and tips for getting the most out of VAMS.
➤ Arrows	Arrows indicate action items (e.g., “Click the button”).
• Bullets	Circular bullets indicate 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 to this manual’s table of contents (e.g., “Return to Table of Contents” links in the page footers).
Dark blue hyperlinks	Dark blue hyperlinks link to other pages in this manual (e.g., Step 1: Activate Your Account in VAMS).
	Buttons like the one pictured also link to other pages in this user manual.

Navigating VAMS

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

To access VAMS once registered, visit the landing page (<https://vams.cdc.gov/vaccineportal/s>) and log in with your user name and password.



The components listed below are in VAMS to help you navigate the system.

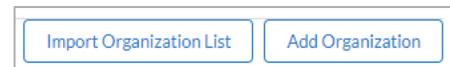
Header/Banner



The **VAMS logo** takes you to your portal's first tab. 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.

My Clinics ▾				
2 Items • Sorted by Name • Filtered by all accounts - Account Record Type				
Name ↑	POC	Email	Status	
1 Oregon State Clinic 1	Clinic Admin		Active	
2 Oregon State Clinic 2	Jim Smith		Active	

A Note About Privacy

To receive COVID-19 vaccine, vaccine recipients must enter data that are considered personally identifiable information (PII) and protected health information (PHI). PII is any data that could potentially identify a specific individual. PHI is information, including demographic information, that relates to the individual's past, present, or future physical or mental health or condition. VAMS complies with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For more information about HIPAA, visit <https://www.cdc.gov/phlp/publications/topic/hipaa.html>.



Notifications from VAMS

Types of Email Notifications Users Should Expect From VAMS

While users can select their preferred method of communication to be email or SMS text, some communications will **always** be sent through email.

Email notifications from...

vams@cdc.gov will be auto-generated emails related to Clinic, Jurisdiction, Organization Portal messages such as:

- ✓ Registration links to new VAMS users
- ✓ Re-occurring two-factor authentication for logins
- ✓ Updates on inventory requests

no-reply@mail.vams.cdc.gov and **no-reply@envelope.mail.vams.cdc.gov** will be auto-generated emails related to the Recipient Portal such as:

- ✓ The initial two-factor authentication code
- ✓ Links for recipients to complete Prevacination Questionnaires
- ✓ Reminders about upcoming recipient appointments

VAMSHelp@cdc.gov will be:

- ✓ Communications from the VAMS Help Desk

***@salesforce.com**: Depending on some email server configurations, we have heard of rare cases where emails are delivered directly from Salesforce. Potential cases include password resets and interacting with VAMS Help Desk agents.

Section 1

Clinics in VAMS

Clinic Portal Roles in VAMS

There are four roles available in the Clinic Portal - clinic administrator (CA), inventory manager (IM), front desk (FD), and healthcare professional (HP). Depending on the clinic type, only some of the roles must be filled for a clinic to operate successfully. The matrix below provides a brief summary of the Clinic Portal roles and their activities in VAMS.

	CA	IM*	FD**	HP
Serve as the clinic POC for your jurisdiction	▪			
Manage clinic information (e.g., physical address)	▪			
Set and manage clinic schedule (<i>standard and mobile clinics only</i>)	▪			
Manage clinic's COVID-19 vaccine inventory	▪	▪		
Manage (add, edit, remove) VAMS clinic users	▪			
Check in vaccine recipients, create walk-ins, or cancel appointments (<i>standard and mobile clinics only</i>)			▪	
Administer vaccine to recipients				▪

* optional role for all clinic types since the clinic administrator can also perform inventory management tasks

** front desk role is not used in VAMS for third-party clinics since they do not check in recipients in VAMS

Clinic Types in VAMS

In VAMS, clinics are categorized within three main types - standard, mobile, and third-party. Within the standard clinic type, there are 4 sub-types. Below is a brief description of the different clinic types along with a list of accompanying clinic users, and examples of each type.

Standard - utilizes all four clinic user roles, searchable by recipients in VAMS

Sub-type	Description	Examples
Clinic	Healthcare setting providing outpatient care with one permanent location for vaccination	Urgent care centers, retail clinics, federally qualified health centers
Hospital	Healthcare setting providing inpatient and/or outpatient care with one permanent location for vaccination	For-profit community hospitals, Veterans Affairs medical centers, nongovernment not-for-profit community hospitals
Pharmacy	Clinic with one permanent location for vaccination	Retail, community, or clinical pharmacies
Pop-up	Temporary clinic location for vaccination	Temporary vaccination sites at workplaces, schools, government facilities

Mobile - utilizes all four clinic user roles, searchable by recipients in VAMS

Clinic with multiple locations for vaccination	Mobile clinic bus, mobile clinic van
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Third-party - does not utilize front desk clinic user role, not searchable by recipients in VAMS

Clinics responsible for both adding and managing recipient records as well as administering and tracking recipients in VAMS	Long-term care facility (LTCF), employees-only clinic within a hospital, etc.
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Other - "other" can be selected if a clinic doesn't fall within one of the categories listed above.



Add Clinics in VAMS

Once you add clinics in VAMS, clinic POCs will be able to activate their account, register their clinic, set the clinic schedule, and add clinic staff as VAMS users.

Information You'll Need to Add Clinics in VAMS

- **Clinic POC's information** (the clinic administrator is typically your POC for the clinic): first name, last name, phone number, email address.
- **Clinic name**
- **Clinic type***: clinic, hospital, pharmacy, other, pop-up, mobile, third-party
- **Clinic address(es)**: primary and shipping (mobile clinics are required to have a permanent shipping address to receive inventory but can change their mobile clinic's physical address as needed)
- **Clinic identifiers - Facility ID, Provider PIN, and Parent Organization ID**: the clinic's Facility ID is required for reporting to CDC and the Parent Organization ID is required for **HL7 integration**. Based upon your jurisdiction's policies, you may also require a clinic's Provider PIN which identifies their facility for ordering in VTrckS.

NOTE: HL7 messages will be held if required clinic identifiers (e.g., facility ID and/or parent organization ID, where applicable) are missing. These messages will be released once the required identifier(s) have been populated.

Before Adding New Clinics in VAMS

Ensure you have proactively communicated with them about the IT recommendations below to expressly permit VAMS notifications from specific email and IP (internet protocol) addresses to be received by their systems. Ensure you have also communicated with and trained new clinics before providing access to the live VAMS site.

Allow notifications from the following email addresses

To ensure communications do not get delayed or blocked by a clinic's exchange servers, advise them to work with their IT departments to allow notifications from the following email addresses:

- vams@cdc.gov
- no-reply@mail.vams.cdc.gov
- no-reply@envelope.mail.vams.cdc.gov
- VAMSHelp@cdc.gov
- *@salesforce.com

Allow notifications from the following IP addresses

Allowing email from specific IP addresses will also greatly improve email deliverability in a timely fashion. Advise clinics coordinate with their IT department to allow the email addresses above as well as email from the following IPs:

Salesforce

96.43.152.64 - 96.43.152.80 (subnet mask = 255.255.255.0)
96.43.153.64 - 96.43.153.80 (subnet mask = 255.255.255.0)

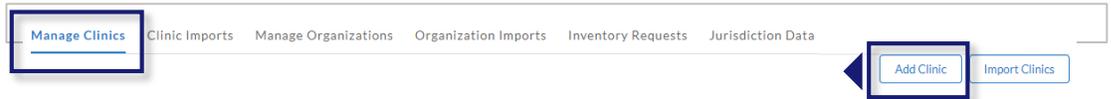
Amazon Web Services

23.251.255.1 - 23.251.255.150
23.251.253.228 - 23.251.254.250
54.240.40.1 - 54.240.40.54

Add Clinics One at a Time

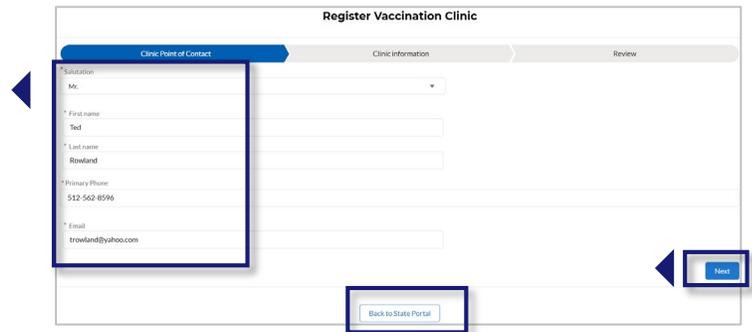
You can add clinics one at a time or you can add multiple clinics at once via bulk upload from the **Manage Clinics** page. First, we will learn how to add one clinic at a time, then how to bulk upload them.

- Click **Add Clinic** on the Manage Clinics page.



- Enter the **clinic POC's information**.
- Click **Next**.

Quick Tip: Click the **Back to State Portal** button to cancel this process. Cancelling the process **deletes** any clinic information entered so far in the process.



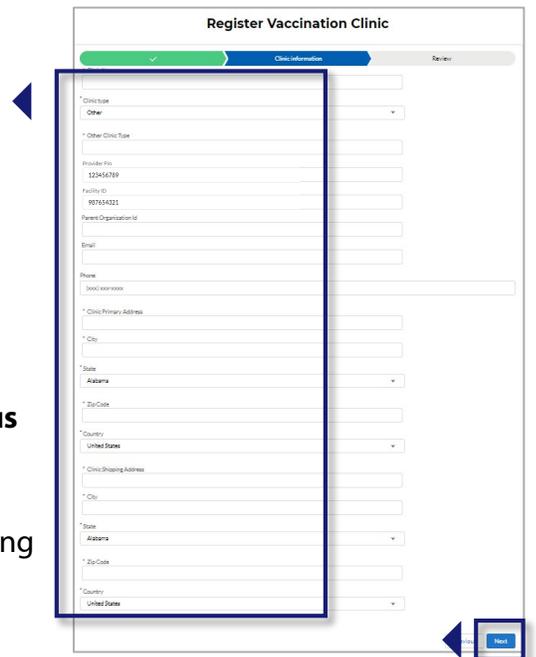
Note the fields marked with a red asterisk (*) are required.

- Enter the clinic's information.
- Although the Provider PIN, Facility ID, and Parent Organization ID fields are not marked with a red asterisk, you must enter that information when adding clinics in VAMS unless you are told it is not required for your jurisdiction.
- The Facility ID is required for CDC reporting, the Parent Organization ID is required for HL7 integration, and the Provider PIN identifies the facility for ordering in VTrckS.

- Review all information entered on the Register Vaccination Clinic pages and **verify** it is correct. If so, click **Next**. If not, click **Previous** to make corrections.

NOTE: Once added, you **cannot change any information** associated with a clinic in VAMS, so review carefully prior to clicking Next on the Review page.

- After clicking **Next**, a message appears confirming the clinic is added to the system.
- Once they are added, clinic POCs receive an email from vams@cdc.gov with a link to activate their account and register their clinic in VAMS.

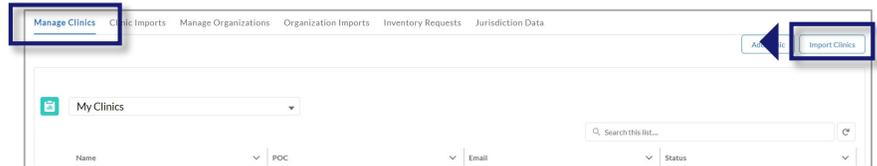


NOTE: To prevent duplication of clinic entries, VAMS will not add a clinic with the same address as a previously added clinic. If this occurs, you will receive an **error message** stating a clinic located at that address is already entered in the system.

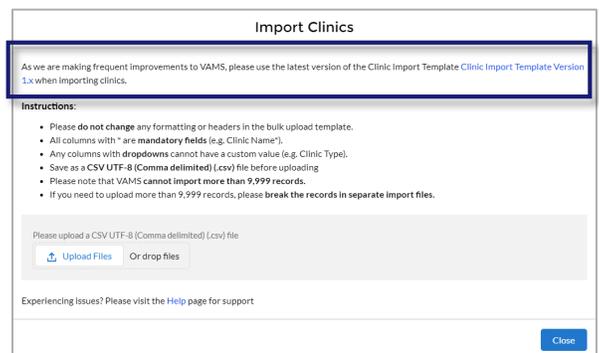
Add Clinics via Bulk Upload

Bulk uploading allows you to add multiple clinics at once by adding their information in a comma delimited (.csv) template and uploading it in VAMS.

- Click **Import Clinics** on the Manage Clinics page.



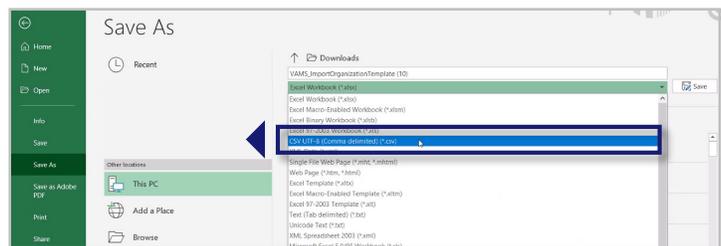
- Click the **Clinic Import Template** link in the pop-up window that appears. After clicking the link, the template file will download to your computer.



NOTE: Always ensure you download and use the latest version of the import template each time you attempt to bulk upload clinics in VAMS to take advantage of constant improvements and to avoid data issues/inconsistencies.

Important Notes about the Clinic Import Template File:

- The file opens on your computer as an .xlsx file, but you **must** save it as a **CSV UTF-8 (Comma delimited) (.csv)** file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.
- You **must** use the latest version of the template when uploading a list of clinics in VAMS.
- All fields marked with an asterisk in the template are required.
- VAMS will not upload a clinic if any of the required fields are blank.
- Fields that contain a pick list or drop-down options **must** contain a selection.
- VAMS will not upload **duplicates** if a clinic is listed in the csv file multiple times or if the clinic has already been added in VAMS.



Quick Tip: A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values. A CSV file stores tabular data (numbers and text) in plain text.



Add Clinics via Bulk Upload *(continued)*

- Open the file and enter the **clinics' information**.
- Save the file as a **CSV UTF-8 (Comma delimited) (.csv)** file. You can find this option under the **Save As** drop-down menu in Excel.
- Click **Upload Files** in the Import Clinic List pop-up window. You can also drag and drop your clinic list in the **Drop Files** area of the page.
- Click **Close**.

Import Clinics

As we are making frequent improvements to VAMS, please use the latest version of the Clinic Import Template [Clinic Import Template Version 1.x](#) when importing clinics.

Instructions:

- Please do not change any formatting or headers in the bulk upload template.
- All columns with * are mandatory fields (e.g. Clinic Name*).
- Any columns with dropdowns cannot have a custom value (e.g. Clinic Type).
- 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.

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

[Upload Files](#) Or drop files

Experiencing issues? Please visit the [Help](#) page for support

[Close](#)

Confirm Bulk Upload

After importing a list of clinics, these processes automatically occur in VAMS:

- A message appears on screen that your list is in the import queue.
 - VAMS sends a registration email to each clinic POC if their information was entered in the .csv file completely.
 - After your list has processed, you will receive an email from vams@cdc.gov, stating it has been uploaded
 - A result log appears on the Clinic Imports page.
- Click the **Clinic Imports** tab to check the results of your bulk upload.
 - On the **Clinic Imports** page, you see information about your upload, including the system-generated Import ID number, who imported the list, and when it was imported.

Import ID	Created By	Created Date
1 EMP-001558	JJ O'Connor	2021-01-11

- Click the **Import ID** number of the clinic import to open the Import Details page.



Add Clinics via Bulk Upload *(continued)*

Confirm Bulk Upload *(continued)*

There are two main sections on the Import Details page:

- **Import details**, which includes the import ID, jurisdiction name, who created it, and the date created
- **Notes and Attachments** table, which includes two files: a **Result Log for Bulk Upload** and the clinic import file you uploaded

Import ID EMP-001558	Jurisdiction Name VAMS IIS	Created By JJ O'Connor	Created Date 1/11/2021, 12:01 PM
Notes & Attachments (2)			
Title	Type	Owner	Last Modified
ResultLog for BulkUpload-Mon, 11 Jan 2021, 12:01 PM.csv	Attachment	JJ O'Connor	1/11/2021, 12:01 PM
Uploaded File, 11 Jan 2021 12:01 PM.csv	Attachment	JJ O'Connor	1/11/2021, 12:01 PM

- The **Result Log for Bulk Upload** file shows the results of your file upload.

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

➤ Scroll to the right until you see the **status column**. The **status column** shows whether a clinic was added in the system.

V	W	X	Y	Z	AA	AB	AC
Clinic Shipping Address ZIP Code/Postal Code*	Clinic Shipping Address Country*	Status					
30305	Fulton	Data update failed. All of the fields with an asterisk(*) are required					
30312	Fulton	email already exists in the system					
		Success					

- If there were duplicates or missing information in the .csv file, you will see an **error message** telling you why a clinic was not uploaded.
- All clinics that have a status of **Success** are uploaded in the system. Clinics with a status that includes an error message have not been uploaded in the system.

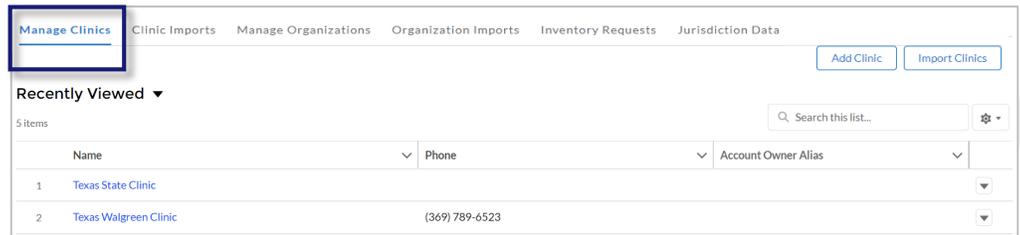
Search and View Clinics

Click the **Manage Clinics** tab to search for and view details of the clinics you've entered in VAMS.

NOTE: You will only be able to view the clinics added in your jurisdiction.

Search for a Clinic

The Manage Clinics page offers multiple ways to search and sort data.



The screenshot shows the 'Manage Clinics' tab selected in a navigation bar. Below the navigation bar, there are buttons for 'Add Clinic' and 'Import Clinics'. A 'Recently Viewed' section shows a table with 5 items. The table has columns for Name, Phone, and Account Owner Alias. Two items are visible: 'Texas State Clinic' and 'Texas Walgreen Clinic' with phone number '(369) 789-6523'. A search bar is located above the table.

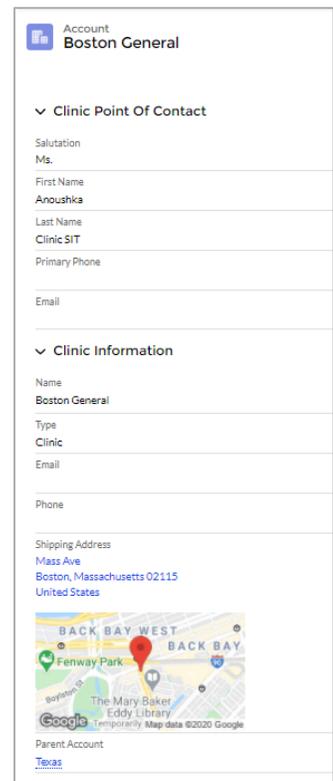
	Name	Phone	Account Owner Alias
1	Texas State Clinic		
2	Texas Walgreen Clinic	(369) 789-6523	

- On the Manage Clinics page, scroll to the bottom of the list and click the **View All** link.
- On the View All page, you can sort by clicking the **arrows** in the columns to sort them by the column headers (e.g., name, email) or use the **search bar** to enter information such as clinic name, clinic POC, email address, or status.

View Details of a Clinic in Your Jurisdiction

- **Click** the name of a clinic to see detailed information.

NOTE: All fields on the details page are **read-only** for the jurisdiction POC.



The screenshot shows the detailed information page for 'Boston General'. It includes sections for 'Clinic Point Of Contact' and 'Clinic Information'. The contact information includes Salutation (Ms.), First Name (Anoushka), Last Name, Clinic SIT, and Primary Phone. The clinic information includes Name (Boston General), Type (Clinic), Email, and Phone. There is also a Shipping Address section with a map showing the location in Boston, Massachusetts. The map includes labels for 'BACK BAY WEST', 'Fenway Park', 'The Mary Baker Eddy Library', and 'Boylston St'. The parent account is listed as 'Texas'.

Manage Clinics

Clinic Status

The list of clinics you entered will appear on the Manage Clinics page. The far-right column shows the clinic’s status. This field is read-only and shows a clinic’s registration status as one of the below.

- **Pending clinic admin registration:** The clinic is entered in VAMS, but the clinic’s administrator has not registered their account.
- **Active:** The clinic’s administrator registered their account.
- **Inactive:** The clinic is deactivated in VAMS (information on when and how to deactivate a clinic in VAMS is below).



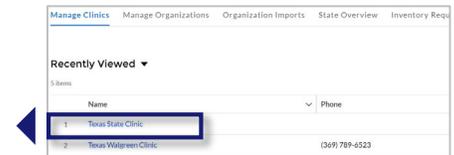
Deactivate Clinics in VAMS

You can deactivate a clinic when it is no longer needed to administer vaccines.

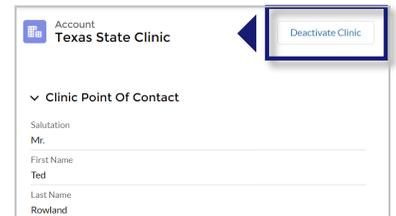
NOTE: Caution should be taken in deactivating a clinic in VAMS as it signals the system to do the following:

- Send an email to the clinic’s administrators telling them the clinic is deactivated.
- Send a cancellation email to recipients with booked appointments.
- Cancel all appointments booked by recipients at the clinic.
- Remove the clinic from the list of searchable clinics.
- Deactivate all clinic inventory requests.
- Close all open appointments.

➤ Click the **name of the clinic** you want to deactivate on the **Manage Clinics** page.



➤ Click **Deactivate Clinic** in the top right corner of the clinic’s account page.



➤ **Review** the data shown in the **Deactivate Clinic** pop-up window, which includes the number of total booked appointments and vaccines in the clinic’s inventory.

➤ Click **Deactivate Clinic**. If you do not want to deactivate the clinic, click **Cancel** to close the pop-up window and return to the clinic’s account page.



Section 2

Organizations in VAMS

Once you add organizations in VAMS, organization coordinators will receive a registration email so they can activate their user account and register their organization in VAMS. After successfully registering their organization, the organization coordinator can provide their members with two ways to register themselves in VAMS:

1. The organization coordinator can add them in the system one at a time or via bulk upload which will trigger a registration email to be sent from VAMS to each member.
2. The organization coordinator can provide them with a common registration link that is established when an organization is authorized for Policy Enabled Registration or PER.

Policy Enabled Registration (PER)

Policy enabled registration allows an organization to provide a common registration link to their members. The **benefit** of using PER is that an organization coordinator does not have to add each organization member into VAMS. For an organization to use PER for their members, you must authorize them to do so, and they must provide you with at least one but up to three email domain names (e.g., fultoncounty.gov, fultoncounty.org, etc.) to enter in their organization record. The **caveat** is that whoever gains access to the common registration link and possesses an email address with one of the domain names provided by the organization coordinator, can register as a recipient.

How PER Works for Organizations and their Members

- After registering, the organization coordinator will see an organization-specific registration link above the tabs within their portal that they can distribute to their members.
- Members will access VAMS using the URL that is distributed from the organization, entering their name and organization email address that has the domain provided to you by the organization coordinator.
- The system will validate the email entered by the member has the same domain as one of the domains entered in the organization's record.
- VAMS will send a unique registration link to the member email (e.g., username@domain.com).
- Members will click the registration link and start the standard registration flow at prescreening. They will then enter personal and insurance (if applicable) information.

NOTES:

- Third-party email domains such as Yahoo Mail or Gmail **cannot** be used for PER. Domains used must be owned by the organization or an affiliate.
- Members **cannot** change their email after they've registered in VAMS.



Add Organizations in VAMS

Information You'll Need to Add Organizations in VAMS

- **Organization POC's information** (first name, last name, email address). Note that the organization POC is referred to as the organization coordinator in VAMS. An organization POC can add additional coordinators in the system after registering but there can only be one POC per organization.
- **Organization name**
- **Organization category** (e.g., inpatient healthcare professionals, etc.)
- **Organization state, ZIP/postal code, and country**
- **Whether organization has or has not been authorized for PER**
NOTE: This must be done when you first add the organization in VAMS as you **cannot edit an organization's record** after adding it in the system.

Before Adding New Organizations in VAMS

Ensure you have proactively communicated with them about the IT recommendations below to expressly permit VAMS notifications from specific email and IP (internet protocol) addresses to be received by their systems. Ensure you have also communicated with and trained new organizations before providing access to the live VAMS site.

Allow notifications from the following email addresses

To ensure communications do not get delayed or blocked by an organization's exchange servers, advise them to work with their IT departments to allow notifications from the following email addresses:

- vams@cdc.gov
- no-reply@mail.vams.cdc.gov
- no-reply@envelope.mail.vams.cdc.gov
- VAMSHelp@cdc.gov
- *@salesforce.com

Allow notifications from the following IP addresses

Allowing email from specific IP addresses will also greatly improve email deliverability in a timely fashion. Advise organization coordinators to coordinate with their IT department to allow the email addresses above as well as email from the following IPs:

Salesforce

96.43.152.64 - 96.43.152.80 (subnet mask = 255.255.255.0)
 96.43.153.64 - 96.43.153.80 (subnet mask = 255.255.255.0)

Amazon Web Services

23.251.255.1 - 23.251.255.150
 23.251.253.228 - 23.251.254.250
 54.240.40.1 - 54.240.40.54

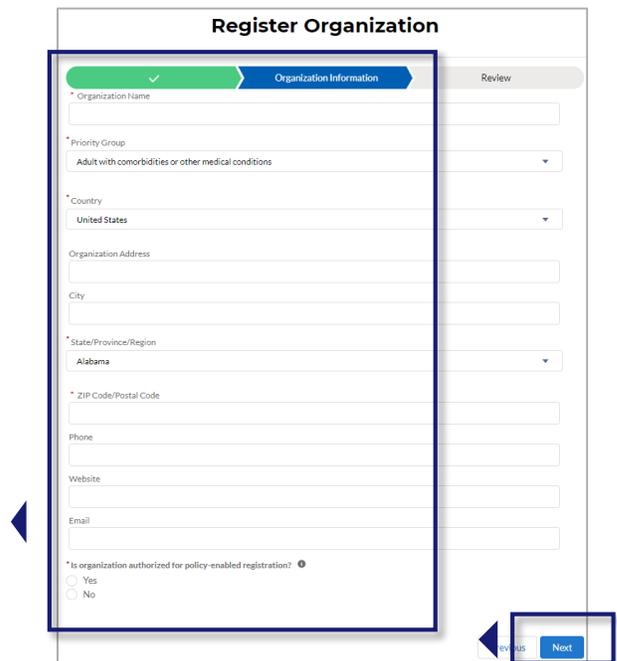
Add Organizations One at a Time

You can add organizations one at a time or you can add multiple organizations at once via bulk upload from the **Manage Organizations** page. First, we will learn how to add one organization at a time, then how to bulk upload them.

- Click **Add Organization** on the Manage Organizations page.



- Enter the **organization POC's information**.
- Click **Next**.
- Enter the **organization's information**.
Click **Next**.
- If an organization becomes authorized or unauthorized for PER after you have added them in VAMS, you can submit a help desk ticket to change their record. More information on how to submit a help desk ticket can be found in the Access Support section of this manual.



- Review all information entered on the Register Organization pages and **verify** it is correct. If so, click **Next**. If not, click **Previous** to make corrections.

NOTE: Once added, you **cannot change any information** associated with an organization in VAMS, so review carefully prior to clicking Next on the Review page.

- After clicking **Next**, a message appears confirming the organization is created in the system. Their status will be **Pending Organization Admin Registration** until the organization's coordinator activates their account and registers the organization in VAMS.
- Once added, the organization coordinator receives an email from vams@cdc.gov with a link to activate their account and register their organization in VAMS. If an organization coordinator has yet to register in VAMS 5 days after receiving their registration link, VAMS automatically sends a reminder email to the member. Reminder emails will continue until the organization coordinator registers or until 5 consecutive reminders have been sent.

Add Organizations via Bulk Upload

Bulk uploading allows you to add multiple organizations at once by adding their information in a comma delimited (.csv) template and uploading it in VAMS. **NOTE:** The template **does not** have a place to record PER information, so organizations that have been authorized to use PER must be added in VAMS individually.

- Click **Import Organizations** on the Manage Organizations page.



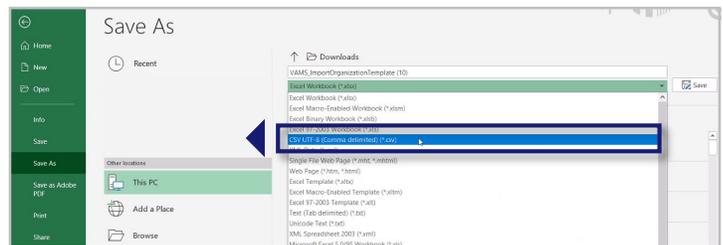
- Click the **Organization Import Template** link in the pop-up window that appears. After clicking the link, the template file will download to your computer.



NOTE: Always ensure you download and use the latest version of the import template each time you attempt to bulk upload organizations in VAMS to take advantage of constant improvements and to avoid data issues/inconsistencies.

Important Notes about the Organization Import Template File:

- The file opens on your computer as an .xlsx file, but you **must** save it as a **CSV UTF-8 (Comma delimited) (.csv)** file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.
- You **must** use this template when uploading a list of organizations in VAMS. Always ensure you download and use the latest version of the import template each time you attempt to bulk upload organizations in VAMS to take advantage of ongoing improvements and to avoid data issues/inconsistencies.
- All fields marked with an asterisk are required.
- Fields that contain a pick list or drop-down options **must** contain a selection.
- VAMS will not upload an organization if any of the required fields are blank.
- VAMS will not upload **duplicates** if someone is listed in the csv file multiple times.
- **NOTE:** The template **does not** have a place to record PER information, so organizations that have been authorized to use PER must be added in VAMS individually.



Quick Tip: A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values. A CSV file stores tabular data (numbers and text) in plain text.



Add Organizations via Bulk Upload

(continued)

- Open the file and enter the **organizations' information**.
- Save the file as a **CSV UTF-8 (Comma delimited) (.csv)** file. You can find this option under the **Save As** drop-down menu in Excel.
- Click **Upload Files** in the Import Organization List pop-up window. You can also drag and drop your organization list in the **Drop Files** area of the page.
- Click **Close**.

Import Organizations

As we are making frequent improvements to VAMS, please use the latest version of the Organization Import Template [Organization Import Template Version 1.x](#) when importing organizations.

Instructions:

- Please do not change any formatting or headers in the bulk upload template.
- All columns with * are mandatory fields (e.g. Organization POC Email*).
- Any columns with dropdowns cannot have a custom value (e.g. Organization Priority group).
- 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.

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

Or drop files

Experiencing issues? Please visit the [Help](#) page for support

Confirm Bulk Upload

After importing a list of organizations, these processes automatically occur in VAMS:

- A message appears on screen that your list is in the import queue
 - VAMS sends a registration email to each organization's coordinator if their information was entered in the csv file completely
 - After your list has processed, you will receive an email from vams@cdc.gov, stating it has been uploaded.
 - A result log appears on the Organization Imports page
- Click the **Organization Imports** tab to check the results of your bulk upload.

On the **Organization Imports** page, you see information about your upload, including the system-generated Import ID number, who imported the list, and when it was imported.

Import ID	Created By	Created Date
EMP-000274	Texas State User POC	8/10/2020, 1:49 PM
EMP-000275	Texas State User POC	8/10/2020, 1:51 PM
EMP-000276	Texas State User POC	8/10/2020, 1:52 PM

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



Add Organizations via Bulk Upload

(continued)

Confirm Bulk Upload (continued)

There are two main sections on the Import Details page:

- **Import details**, which includes the import ID, jurisdiction name, who created it, and the date created.
- **Notes and Attachments** table, which includes two files: a **Result Log for Bulk Upload** and the organization import file you uploaded.
 - The **Result Log for Bulk Upload** file shows the results of your file upload.

Import ID EMP-000274	Jurisdiction Name Texas	Created By Texas State User POC	Created Date 8/10/2020
Notes & Attachments (2)			
Title	Type	Owner	Last Modified
ResultLog for BulkUpload-Mon, 10 Aug ...	Attachment	Texas State User POC	8/10/2020, 1:49 PM
Uploaded File-Mon, 10 Aug 2020 1:49 ...	Attachment	Texas State User POC	8/10/2020, 1:49 PM

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

➤ Scroll to the right until you see the **status column**. The **status column** shows whether an organization was added in the system.

K	L	M	N	O	P	Q	R	S	T	U	V
Organizati	Organizati	Organizati	Organizati	Status							
Las Vegas	Nevada	12344	United Sta	This Organization POC already exists in the VAMS system please check the POC Email							

- If there were duplicates or missing information in the csv file, you will see an **error message** telling you why an organization was not uploaded.
- All organizations who have a status of **Success** are uploaded in the system. Organizations whose statuses include an error message have not been uploaded in the system.



Search and View Organizations

Click the **Manage Organizations** tab to search for and view details of the organizations you've entered in VAMS.

NOTE: You will only be able to view the organizations added in your jurisdiction.

Search for an Organization

The Manage Organizations page offers multiple ways to search and sort data.

The screenshot shows the 'Manage Organizations' tab selected in a navigation bar. Below the navigation bar, there are buttons for 'Add Clinic' and 'Import Clinics'. A 'Recently Viewed' section shows a table with 5 items. The table has columns for Name, Phone, and Account Owner Alias. Two items are listed: 'Texas State Clinic' and 'Texas Walgreen Clinic' with phone number '(369) 789-6523'.

	Name	Phone	Account Owner Alias
1	Texas State Clinic		
2	Texas Walgreen Clinic	(369) 789-6523	

- On the Manage Organizations page, scroll to the bottom of the list and click the **View All** link.
- On the View All page, you can sort by clicking the **arrows** in the columns to sort them by the column headers (e.g., name, email) or use the **search bar** to enter information such as clinic name, clinic POC, email address, or status.

View Details of an Organization in Your Jurisdiction

- **Click** the name of an organization to see detailed information.

NOTE: All fields on the details page are **read-only** for the jurisdiction POC.

Organization Point of Contact

Salutation
Mr.

First Name
Matt

Last Name
Minns

Primary Phone

Email
vams.traineremployer01@gmail.com

Organization Information

Name
IIS Healthcare Workers

Organization Category
Inpatient healthcare providers

Email

Phone

Shipping Address
[Michigan 49345](#)
[United States](#)

Parent Account
[VAMS IIS](#)

Section 3

Inventory Requests Management in VAMS

Clinic inventory managers or clinic administrators will submit COVID-19 vaccine inventory requests in VAMS for you to receive and fulfill.

You can view and manage inventory requests from clinics on the Inventory Requests page. From here, you can access their inventory request record to review request details as well as communicate with clinics about the status of their request.

NOTE: While you will receive inventory requests in VAMS, you will place all vaccine orders from manufacturers **outside of VAMS** through your existing supply ordering processes.

View and Manage Inventory Requests

➤ Click the **Inventory Requests** tab.

IRN	Clinic	Product	Date Requested	Date Required By	Doses Requested	Status
73	CVS Burlington Pharmacy	COVID-B	8/27/2020	8/27/2020	20	Submitted
74	CVS Burlington Pharmacy	COVID-B	8/28/2020	8/28/2020	20	Submitted
75	kentucky clinic CST	COVID-B	8/28/2020	8/28/2020	1	Submitted
76	kentucky clinic CST	COVID-B	8/28/2020	8/28/2020	1	Submitted
77	CVS Farmacy	COVID-A1	8/29/2020	9/1/2020	1,000	Submitted

The Inventory Requests page shows you a list of all inventory requests received from clinics in your jurisdiction. The list includes a system-generated **inventory request number**, **clinic name**, **product type** (vaccine type), **date requested** and **required by**, number of **doses requested**, and the inventory request **status**.

Sort requests on this page by clicking the arrows in the columns to sort them by the column headers (e.g., clinic name, product, etc.).

Inventory Requests Management in VAMS (continued)

Access Inventory Request Record

The inventory request record gives you important details about the inventory request and a way to monitor it and communicate with the requestor.

Manage Clinics Clinic Imports Manage Organizations Organization Imports Inventory Requests Jurisdiction Data							
Inventory Requests ▾							
190 items • Sorted by Inventory Request Number • Filtered by all site inventory requests							
Inventory Reques... ↑ ▾	Clinic ▾	Product ▾	Date Requested ▾	Date Required By ▾	Doses Requested ▾	Status ▾	
73	IRN-0075	CVS Burlington Pharmacy	COVID-B	8/27/2020	8/27/2020	20	Submitted
74	IRN-0076	CVS Burlington Pharmacy	COVID-B	8/28/2020	8/28/2020	20	Submitted

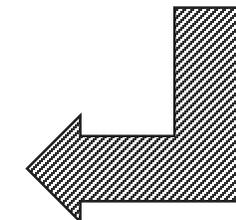
➤ Click the **Inventory Request Number** in the list to access the inventory request record.

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 requestor.
Send the requestor a message by typing in the **Post** box and clicking **Share**. When communicating with the requestor, make sure to include relevant information about the shipment. For example, if you split up inventory to send to multiple locations, be sure to communicate the Unit of Sale National Drug Code or UoS NDC to the receiving clinics.

Monitor or follow comments made to your posts.
Like you would on a social media platform, click the **Follow** button to receive email notifications when the requestor responds to a post that 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.

Section 4

Enable Recipient Registration for Jurisdiction and Clinic Staff

This section shows you how to complete the specific tasks you need to do so that you, other jurisdiction staff, and clinic staff can register as recipients in VAMS.

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

Enable Recipient Registration in VAMS for Jurisdiction Staff

Add Jurisdiction as an Organization

Add your jurisdiction as an organization in VAMS.

Register Jurisdiction as an Organization

Register your jurisdiction as an organization to gain access to the Organization Portal.

Add Jurisdiction Staff as Organization Members

Add jurisdiction staff as organization members one at a time or through bulk upload so they can register to become eligible to receive COVID-19 vaccination.

Register as a Recipient

Register as a recipient in VAMS to become eligible to receive COVID-19 vaccination.

Enable Recipient Registration in VAMS for Clinic Staff

Add Clinics as Organizations

Add clinics as organizations in VAMS so clinic staff can become eligible to receive COVID-19 vaccination.



Add Jurisdiction as an Organization

Multi-Portal Users in VAMS

VAMS users can perform tasks in multiple portals if they become multi-portal users. You will need this multi-portal user access for you and your staff to receive COVID-19 vaccination.

Multi-portal users use the same email address and password to log into VAMS for every user role they have. However, once logged in, they have multiple portals to select from depending on what they want to do in the system.

To better explain this functionality in VAMS, let's make you a multi-portal user.

Add Your Jurisdiction as an Organization

For you and other staff in your jurisdiction to become eligible to receive COVID-19 vaccination, **your jurisdiction must be added in VAMS as an organization**. Once added as an organization, add yourself and jurisdiction staff as members of that organization. Then, members will receive emails to register as vaccine recipients.

To add your jurisdiction as an organization in VAMS, you will follow a similar process as what is described in [Step 2](#) in Section 1 of this user manual. However, there are a few adjustments to the process, as explained below.

- Within the Jurisdiction Portal, click the **Manage Organizations** tab.
- Click the **Add Organization** button to access the Register Organization page.
- Enter **yourself as the organization coordinator** using the **same email address** you use to log into VAMS as a jurisdiction POC. Click **Next**.

Quick Tip: Name your organization to match your jurisdiction (e.g., State of Georgia) to prevent confusion from jurisdiction employees receiving a VAMS recipient registration email.

- Enter your organization's (jurisdiction's) **information** (address, phone number, etc.). Click **Next**.
- **Review** all information entered in the Register Organization pages and **verify** everything is correct. If so, click **Next**. If not, click **Previous** to make corrections.

Register Jurisdiction as an Organization

After clicking Next, a message will appear confirming the organization is created in the system. You will then receive an **email notification** from vams@cdc.gov with a **link to register** your organization in VAMS.

➤ If you're currently logged into VAMS, **log out** by clicking the drop-down arrow next to your name in the upper right corner of the page, then click **Logout**.

➤ **Open** your email notification and click the **organization registration link**.

➤ Click **Login to VAMS**.

➤ Enter the **email address** you use for your jurisdiction login. This should be the same email you entered for yourself as the organization coordinator.

➤ Enter the **same password** you use when logging in as a jurisdiction POC, 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.

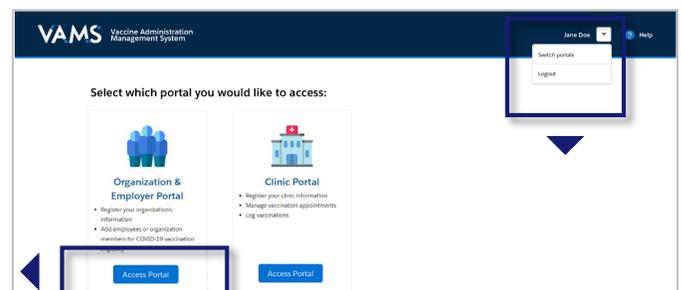


• After logging in, you will be taken to the **Portal Selection** screen where you now have two portals to choose from: the Jurisdiction Portal and the Organization Portal.

You are now officially a multi-portal user!

➤ Click **Access Portal** below the Organization Portal to complete the registration of your jurisdiction's organization.

NOTE: Use the **Jurisdiction Portal** for your role as the jurisdiction POC and the **Organization Portal** for the new organization account you just registered for your jurisdiction.



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**.



Register Jurisdiction as an Organization

(continued)

After accessing the Organization Portal, you will be taken to the **Register Organization** page.

- **Verify** the information entered for the jurisdiction is correct and click **Next**.

- Enter additional required information about your jurisdiction (if applicable) in the **Organization Information** page. Click **Next**.

- **Review** all of your jurisdiction's information. If everything is correct, click **Next**. If not, click **Previous** to make corrections.

Quick Tip: After completing your registration, you can add coordinators to your jurisdiction organization by clicking **Add Coordinator** at the top right of the screen. Note that, once added, coordinators cannot be removed.

Add Jurisdiction Staff as Organization Members

Add Jurisdiction Organization Members in VAMS One At a Time

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

Adding jurisdiction staff as members allows them to register as COVID-19 vaccine recipients and schedule vaccination appointments in VAMS.

There are **two ways to add members** so they can be vaccinated: one at a time or via bulk upload by importing a list of names. First, we’ll learn how to add members one at a time, then how to bulk upload them.

- Click the **Add Member** button on the **My Members tab** within the Organization Portal.



The screenshot shows the 'My Members' tab in the VAMS Organization Portal. The 'Add Member' button is highlighted with a red box. The interface includes a search bar, a table with columns for First Name, Last Name, and Email, and a 'Save' button.

- Enter the member’s first and last name and email address, then click **Save**.

Note the following field requirements:

- First name is limited to 255 characters
- Last name is limited to 255 characters
- Email address must contain an "@" sign and valid domain (.com, .gov, etc.) or an error message will appear
- If the email address you entered already exists in VAMS, you will receive an error message that states, “A member with this email already exists.”



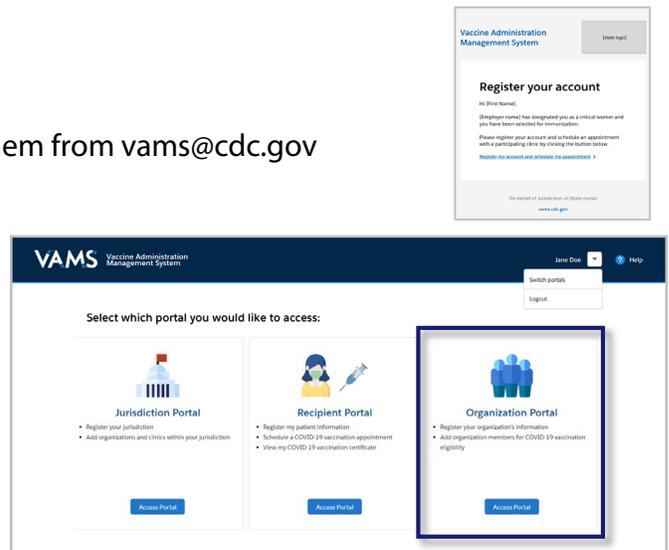
The screenshot shows the 'Add Member' form with three input fields: 'First Name', 'Last Name', and 'Email'. Each field has an asterisk next to it, indicating it is a required field. A red box highlights the 'Save' button.

NOTE: Fields marked with an asterisk are required.

After adding a member, a registration email is sent to them from vams@cdc.gov with a link to register as a COVID-19 vaccine recipient.

Quick Tip: Don’t forget to add yourself as a member! Use the same email address you use to log in as a jurisdiction POC and organization coordinator.

Follow the process outlined in [Register as a Recipient](#). Once registered, you will have access to three portals: Jurisdiction, Organization, and Recipient.



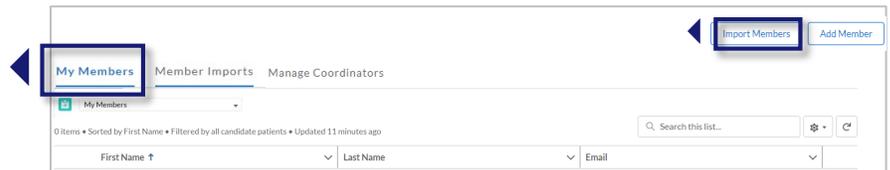
The screenshot shows the VAMS registration email and the VAMS Organization Portal. The 'Organization Portal' option is highlighted with a red box. The email is from vams@cdc.gov and contains instructions for registering as a COVID-19 vaccine recipient. The VAMS Organization Portal shows three options: Jurisdiction Portal, Recipient Portal, and Organization Portal. The Organization Portal is highlighted with a red box.

Add Jurisdiction Staff as Organization Members *(continued)*

Add Jurisdiction Members in VAMS via Bulk Upload

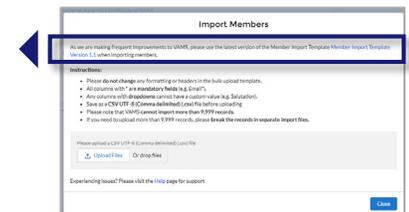
You can add multiple members in VAMS at one time with bulk upload.

➤ Within the Organization Portal, click the **My Members** tab.



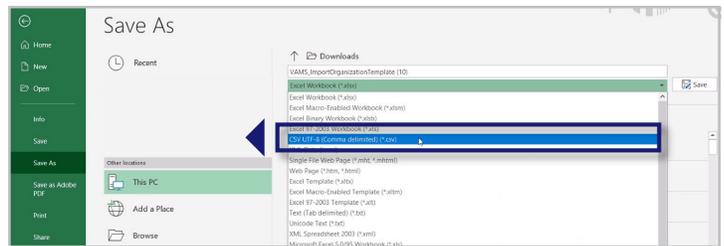
➤ Click the **Import Members** button in the top right corner of the page.

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



Important Notes about the Member Import Template File:

- The file opens on your computer as an .xlsx file, but you **must** save it as a **CSV UTF-8 (Comma delimited) (.csv)** file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.
- You **must** use this template when uploading a list of members in VAMS. Please ensure you download and use the latest version of the import template each time you attempt to bulk upload members in VAMS to take advantage of constant improvements and to avoid data issues/inconsistencies.
- All fields marked with an asterisk are required.
- Fields that contain a pick list or drop-down options **must** contain a selection.
- VAMS will not upload a member if any of the required fields are blank.
- VAMS will not upload duplicates if someone is listed in the csv file multiple times.

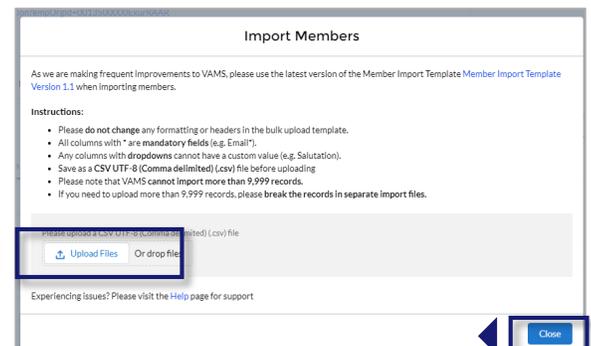


NOTE: A comma separated values (csv) file is a plain text file that contains a list of data. These files are often used for exchanging data between different applications.

- **Open** the file and enter your members' information.
- **Save** the file as a **CSV UTF-8 (Comma delimited) (.csv)** file. You can find this option under the **Save As** drop-down menu in Excel.

➤ In the Import Member List pop-up window, click the **Upload Files** button or drag and drop your member list in the **Drop Files** area of the page.

➤ Click **Close**.





Add Jurisdiction Staff as Organization Members *(continued)*

Confirm Bulk Upload

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

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

➤ Click the **Member Imports** tab to check the results of your bulk upload.

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

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

➤ Click the **Import ID** number of the member import to open the import details page.

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

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

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

➤ Scroll to the right until you see the **status** column. This column indicates whether a member was added in the system.

- If there were duplicates or missing information, you will see an **error message** saying why a member was not uploaded in VAMS.
- All members who have a status of **Success** are uploaded in the system. Members whose statuses include an error message have not been uploaded in the system.

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



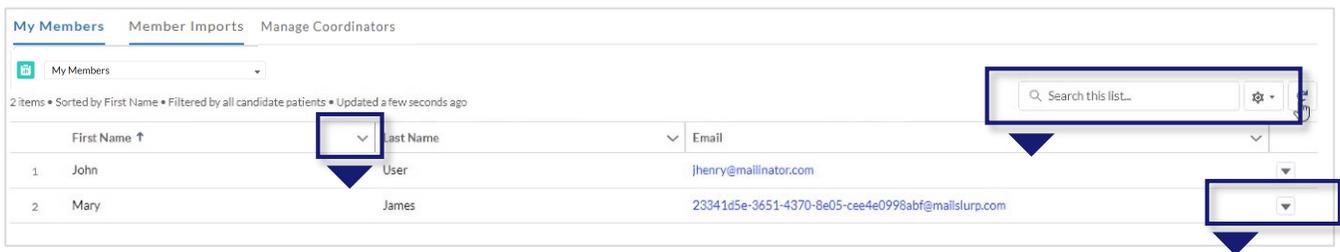
Add Jurisdiction Staff as Organization Members *(continued)*

View Member List and Search

View a comprehensive list of jurisdiction members entered in VAMS by clicking the **My Members** tab. You can also search for a particular member on this page (see below).

The default view on this page is an abbreviated list of all members added in VAMS. To view them all, click the **View All** link at the bottom of the list.

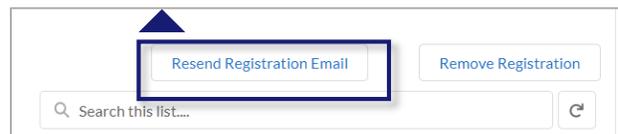
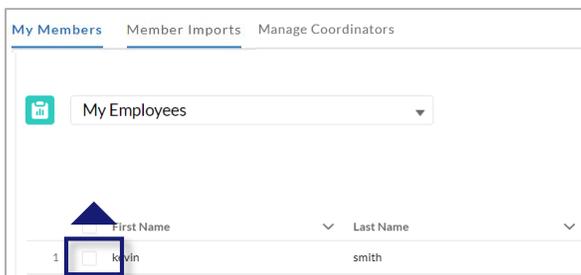
There are multiple ways to search for members on the **My Members** page.



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

Resend Member Registration Email

From the **My Members** page, select the **checkbox** next to the names of the members you want to resend the registration email to, then click the **Resend Registration Email** button at the top right of the screen.



NOTE:

- You can only resend the email one time per hour.
- You can only resend a registration email a maximum of five times per individual.
- You cannot resend a registration email to an individual who has already registered their VAMS account.



Add Jurisdiction Staff as Organization Members *(continued)*

Edit Member Information

You can edit **first name**, **last name**, and **email address** for individuals in your organization after uploading them to your organization in VAMS.

- From the My Members tab, hover your mouse over the name or email address you want to edit.
- Click the pencil icon on the right side of the cell.
- Enter the updated information, then click enter.
- The updated information will then be highlighted yellow to confirm it has been updated.

	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name
1	Kevin	Smith

NOTE:

- You cannot change the information of an individual who has already registered their VAMS account.
- The recipient can edit their own first name and last name during the recipient registration process and once their account is registered.
- Recipients cannot change their email address.

Remove Members

You can **remove** members from your organization after uploading them to your organization in VAMS.

- From the My Members tab, select the checkbox next to the names of the members you wish to remove from your organization.
- After ensuring the boxes are checked, click the Remove Registration button on the right side of the page.
- You will then see a success message on the top of the screen confirming the employees were removed.

NOTE:

- You cannot remove members after they have registered their account.
- If members try to register after being removed, VAMS will inform them there was an error processing their registration and that they should contact their administrator for more information.

	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name
1	<input checked="" type="checkbox"/> kevin	smith

Resend Registration Email
Remove Registration

Register as a Recipient

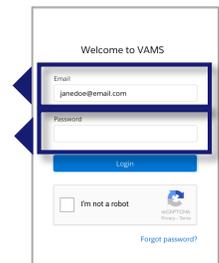
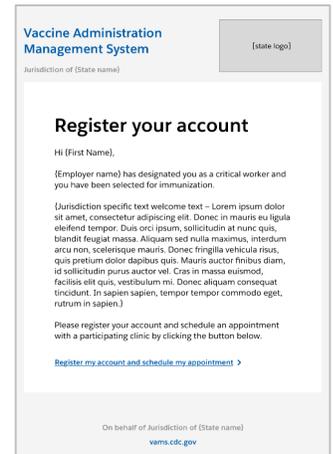
After you're added as a member in VAMS, a registration email is sent to you from vams@cdc.gov with a link to register as a COVID-19 vaccine recipient.

- If you're logged into VAMS, **log out** by clicking the drop-down arrow next to your name in the upper right corner of the page, then click **Logout**.
- Open the recipient **email notification** you received and click the link to register your account.

Quick Tip: If this email is not in your inbox, you may need to check your junk or spam mail folders.

- 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**.

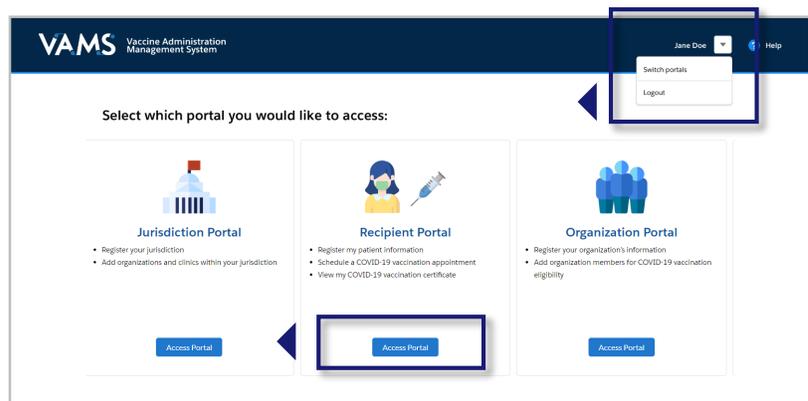
NOTE: Every time you log into VAMS, you must verify your identity by entering your password, and a number you receive via email or SMS, depending on the preferred contact method you choose (two-factor authentication process). After five log-in attempt failures, you will be locked out of the system for one hour.



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

- 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 and selecting **Switch Portals**.



Add Clinics as Organizations

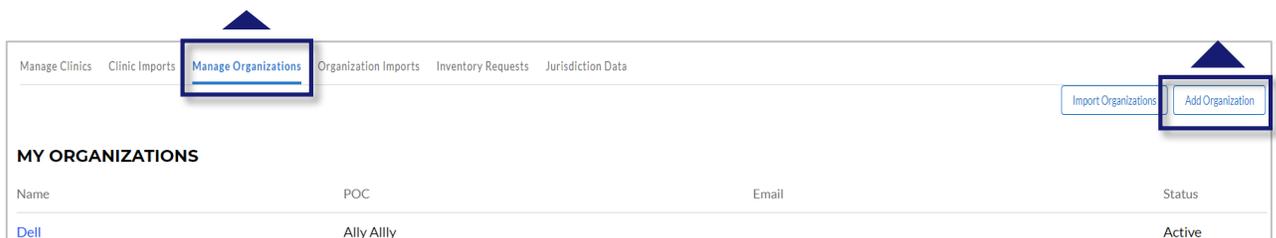
A vaccination clinic must register as an organization in VAMS for their staff to be eligible to receive COVID-19 vaccination.

Add a clinic as an organization if requested to do so by the clinic administrator. The clinic administrator **can** be the organization coordinator or they can **select a delegate** from the clinic to be this coordinator. Whether they fill the role themselves or choose a delegate, they **must** provide you with the organization coordinator's first and last name and the email address the coordinator currently uses to log into VAMS.

Once the clinic is added as an organization in VAMS, the system **sends a registration email** from vams@cdc.gov to the clinic's organization coordinator with a link to register their organization.

You can **add a clinic as an organization** in VAMS the same way you add other organizations.

- Within the Jurisdiction Portal, Click the **Manage Organizations** tab.
- Click **Add Organization** to get to the Register Organization page.



- Enter the coordinator's contact information. Be sure to use the **same email address** the coordinator uses to log into VAMS in their normal role. Click **Next**.

Quick Tip: Naming the organization to match the name of the clinic is helpful in preventing duplications.

- Enter all **required information** on the Register Organization pages (e.g., Organization POC, Organization Information).

- **Review all information** on the Register Organization pages and **verify** everything is correct. If so, click **Next**. If not, click **Previous** to return to make corrections.

Section 5

Access Support

This section will show you how to find answers to common questions clinic staff may have about VAMS.

VAMS Support

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

Access Support

Know how to find answers to frequently asked questions (FAQs) about VAMS and submit questions to the VAMS Help Desk.

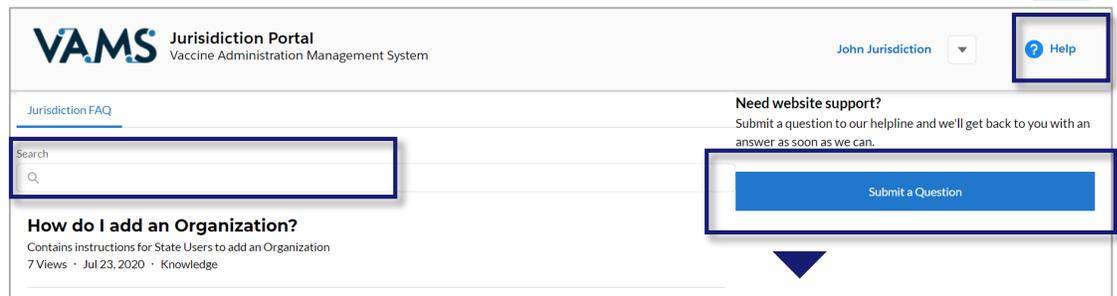
VAMS Support

Where to Find Additional VAMS Resources and Information

Help Page

The **Help** page has answers to frequently asked questions (FAQs) about the Clinic Portal roles and access in VAMS.

- If you need help when using VAMS, click the **Help** link in the upper right corner of the navigation bar to find support.
- 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.



Submit a Question

- If you don't find the information you're looking for, you can **submit a question**.
- From the **Help Page**, click **Submit a Question**.
- Click **Submit a Case** and select **New Clinic Case**.
- When logged into the system, your name will be prepopulated in your case.
- **Select the category of your question** (and subcategory, if applicable), select your **jurisdiction**, **type** the subject of your question, then **type** your question in the text box.
- After clicking **Confirm**, a message will appear on the screen confirming your question was sent.
- A response to your question will be sent to you via email from **vamshelp@cdc.gov**.
- Once you receive a response to your question, you can communicate back and forth with the support team by replying to the email.

NOTE: Do not edit the subject line of the email or the support team member who initially responded to your question will not receive it.

Help Desk

If you need additional support, contact the VAMS Help Desk. To ensure jurisdictions and clinics are fully supported, VAMS Help Desk support is **limited to jurisdiction and clinic personnel only**.

Toll-Free Number: +1 833-957-1100

Hours of Operation: 8:00 AM – 8:00 PM EST Monday through Friday

Glossary of Terms

Term	Definition
.csv	A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values.
Organization	Any institution, association, company, or other group that identifies and adds members (individuals eligible for COVID-19 vaccine) in VAMS.
Member	An individual being added in VAMS to receive a COVID-19 vaccine.
Mobile Clinic	A clinic that moves to multiple locations for vaccination (e.g., a mobile clinic bus or van).
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 identifies and adds members (individuals eligible for COVID-19 vaccine) in VAMS.
Pop-Up Clinic	A temporary clinic that has one permanent location (e.g., a clinic set up in a school gym that will stay at that location while it is open).
Third-party Clinic	Vaccination clinic responsible for both adding and managing recipient records as well as administering and tracking recipient vaccination in VAMS.
Vaccination Clinic	A clinic providing COVID-19 vaccination. Sometimes referred to as “vaccine clinic” in VAMS and this user manual.