

# User Manual

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## Organization Coordinator

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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 an **organization coordinator**, you will use VAMS to identify priority group workers and other at-risk groups who need to receive COVID-19 vaccine when it first becomes available and add these individuals in VAMS so they can schedule vaccination appointments. You will also serve as a liaison between your jurisdiction point of contact (POC) and the members of your organization.

## This user manual is designed for you.

This user manual gives you a description of your role and responsibilities in VAMS and where you fit in to the overall process of providing COVID-19 vaccines to recipients. It is divided into sections that follow the order of steps you will take in VAMS to perform your unique tasks. Detailed instructions on how to perform those tasks are included in each section.

## How to Use this User Manual

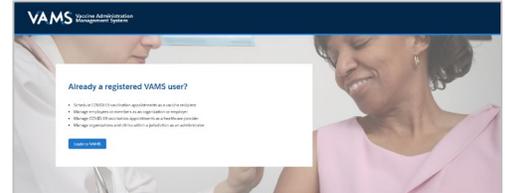
Throughout this user manual, you will see the following components.

Component	Description
<b>NOTE:</b>	Notes are need-to-know pieces of information you should be aware of.
<b>Quick Tip:</b>	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”).
<a href="#">Bright blue hyperlinks</a>	Bright blue hyperlinks link to external pages (e.g., <a href="https://vams.cdc.gov/vaccineportal/s">https://vams.cdc.gov/vaccineportal/s</a> ).
<a href="#">Gray hyperlinks</a>	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).
<a href="#">Dark blue hyperlinks</a>	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 (see [Section 1, Step 1](#) for how to activate your VAMS account).



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

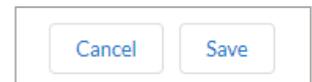
## Header/Banner



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.



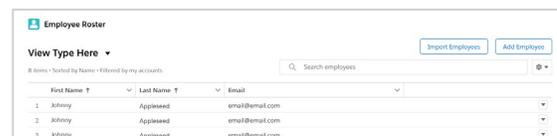
## Tabs

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.



## 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>.

# Section 1

## Getting Started in VAMS

This checklist provides a summary of the two steps you will take to add your organization in VAMS so that your priority group members, or other individuals that you have identified, can become eligible to receive COVID-19 vaccination.

Step	Information You Need to Complete this Step
<p><input type="checkbox"/> <b>Step 1: <a href="#">Activate your user account in VAMS</a>.</b> Follow the prompts in your registration email from vams@cdc.gov to complete this step.</p>	<ul style="list-style-type: none"> <li>• Access to the internet</li> <li>• Access to your email account</li> <li>• Registration email from <b>vams@cdc.gov</b></li> </ul>
<p><input type="checkbox"/> <b>Step 2: <a href="#">Register your organization</a>.</b> Confirm that your contact information and organization information in VAMS is correct.</p>	<ul style="list-style-type: none"> <li>• Access to the internet</li> <li>• Organization name</li> <li>• Primary address</li> <li>• Phone number</li> <li>• Your email address</li> </ul>

# Step 1: Activate Your User Account

## What you'll need to complete this step

- Access to the internet
- Access to your email account
- Registration email from **vams@cdc.gov**

You must activate an account in VAMS to use the system. After your jurisdiction's POC enters your name and email address in VAMS, you will receive an email with a VAMS registration link. If you have yet to register in VAMS 5 days after receiving your registration link, VAMS automatically sends you a reminder email. Reminder emails will continue up until you register or until 5 consecutive reminders have been sent.

- Search your inbox for an email from **vams@cdc.gov**.

**Quick Tip:** If this email is not in your inbox, you may need to check your junk or spam mail folders. If you still cannot find the email, contact your jurisdiction's POC.

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

**NOTE:** The registration link in your email is for your registration only and cannot be used to register anyone else. Please do not forward it to anyone because the link will not work for them.



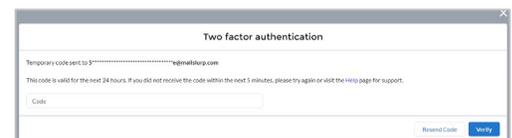
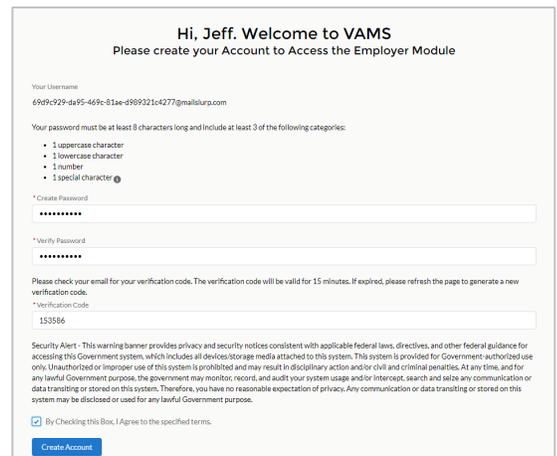
- **Verify your email address** (the email address where you received the original VAMS invitation will be prepopulated). Your email address will be your **user name** when logging in to VAMS.

- Create and verify your **password**.
- Check your email account for a **verification code** that will be sent to you immediately after clicking the registration link in your email from vams@cdc.gov. **Enter the verification code.**

- Read the **terms and conditions** and check the box saying you agree.

- Click **Create Account**.

**NOTE:** Every time you log into VAMS, you must verify your identity 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 creating your account, you will immediately be taken to the **Register Organization** page.

# Step 2: Register Your Organization in VAMS

## What you'll need to complete this step

- Organization name
- Organization address
- Phone number
- Your email address

➤ On the Point of Contact page, **confirm your information is correct.** If not, make the necessary edits, then click **Next**.

➤ On the Organization Information page, **confirm your organization's information is correct.** If not, make the necessary edits, then click **Next**.

➤ **Review** all 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 organization by clicking **Add Coordinator** at the top right of the screen. Note that, once added, coordinators cannot be removed from your organization.

# Section 2

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## Add Organization Members in VAMS

Now that you activated your account and registered your organization in VAMS, you can use the system to add your organization's members in VAMS so they can become eligible to receive COVID-19 vaccination. This can be done by allowing them to register through adding them in VAMS individually or via bulk upload, policy enabled registration, or a combination of all three methods.

### Three Ways to Add Members in VAMS So They Can Register for COVID-19 Vaccination

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

Add Members in VAMS via  
Bulk Upload

Add multiple members in VAMS at one time by using the bulk upload function.

Add Members in VAMS One  
at a Time

Add members' names and email addresses in VAMS one at a time.

Policy Enabled Registration

Policy Enabled Registration (PER) allows an organization to send a common registration link for member registration.

Add Yourself as a Member of  
Your Organization

Don't forget to add yourself to become eligible to receive COVID-19 vaccination.

# Add Members in VAMS One at a Time

The term “member” is used in VAMS to signify any person added by an organization in VAMS for COVID-19 vaccination.

In addition to policy enabled registration, there are **two other ways to add members in VAMS** so they can register to become eligible to receive COVID-19 vaccination: one at a time or via bulk upload by importing a list of names. On this page, we’ll learn how to add members one at a time.

- Click the **Add Member** button in the **My Members** tab.



- Enter the member’s first and last name and email address. Click **Save**.

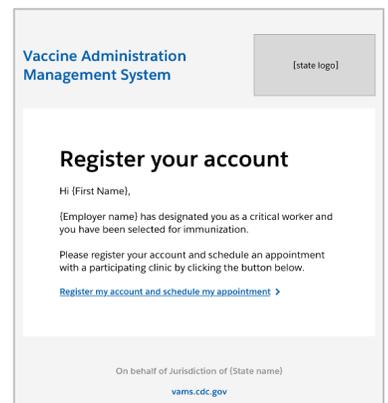
### Note the following field requirements:

- 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.”



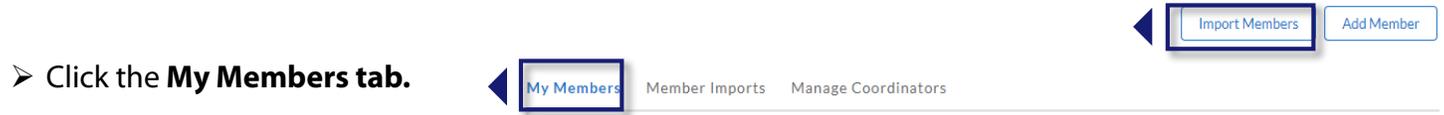
**NOTE:** All three fields are mandatory, as indicated by a red asterisk (\*) next to the field names on the form.

After adding a member in VAMS, a **registration email** is sent to them from no-reply@envelope.mail.vams.cdc.gov with a **link** to register their account.



# Add Members in VAMS via Bulk Upload

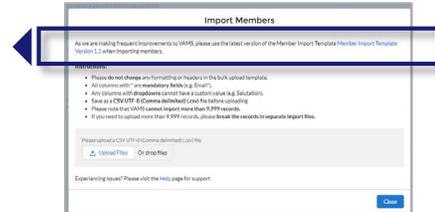
In addition to policy-enabled registration and adding members one at a time, you can also add multiple members in VAMS at once with bulk upload.



➤ Click the **My Members tab**.

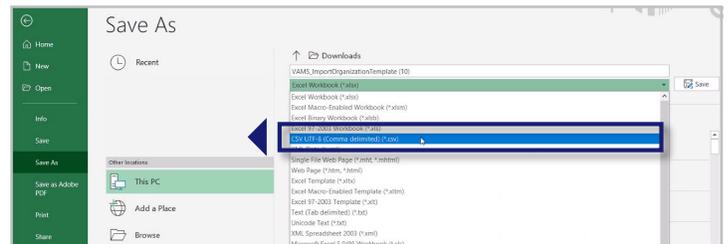
➤ Click the **Import Members button** in the top right corner of the page.

➤ 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 the latest version of the import 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 within the template that are marked with an asterisk are required.
- 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 or has already been added in VAMS.



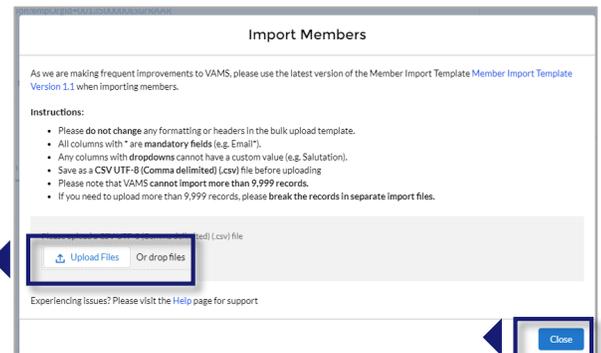
**NOTE:** A comma separated values (csv) file is a plain text file that contains a list of data. These files are often used for exchanging data between different applications.

➤ 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 Members in VAMS via Bulk Upload

(continued)

## Confirm Bulk Upload

Once you have imported a list of members, the following processes will occur in VAMS:

- A **message will appear** on screen that your list is in the import queue.
- VAMS will send a **registration email** from vams@cdc.gov to each member if their information was entered in the csv file completely.
- After your list has fully processed, you will **receive an email** from vams@cdc.gov, stating that it has been uploaded. Depending on the size of the import file, your member list may not upload immediately.
- A **Result Log for Bulk Upload** file will appear in the Member Imports page. This file will show you all the members added to the system and explain 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
ResultLog for BulkUpload-Tue, 28 Jul 2020 3:36 PM.csv	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** have been 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@ms	email already exists in the system					
4	FNU	LNU	Inufnu@n	email already exists in the system					
5									
6									
7									



# Policy Enabled Registration

**Policy Enabled Registration (PER)** allows an organization to provide a common registration link for their members' registration in VAMS. In doing so, anyone with this email domain has the option to register in VAMS. **NOTE:** PER is domain-specific, not link-specific. **Only use PER if you wish to give everyone with a specific email domain the ability to register. Even if you only send the link initially to a few members, others will still be able to register if they are sent the link and have the same email domain enabled by PER** (e.g., if PER is enabled for the domain @xyz.com, **anyone** with this email domain can use your link to register in VAMS, **not** just those who receive the link).

For your organization to use PER for your members, you must provide at least one but up to 5 email domains (e.g., fultoncounty.gov, fultoncounty.org) to the jurisdiction POC so they can include that information when adding your organization in VAMS. **NOTE:** This must be done when the jurisdiction POC first adds your organization in VAMS as they **cannot edit your organization's record** after it has been added in the system.

Once the jurisdiction POC adds the email domain(s) you provided and you have registered your organization in VAMS, you will see an organization-specific registration link above the tabs within the Organization Portal. You can **copy this link and distribute it to your members**.

Your organization is authorized for policy-enabled registration. This allows your recipients to register within VAMS using your organization-specific link below.

[\[http://thisurl.com/org\]](http://thisurl.com/org)

Valid recipient email domains:

- organization.com
- organization2.com

Please submit a support request to your jurisdiction to change the policy-enabled email domains.

- Members will access VAMS using the organization-specific registration link you distributed and enter their organization email and name.
- The system will validate that the email entered by the member has the same domain as one of the domains the jurisdiction POC entered in your organization's record.
- VAMS will send a unique registration link to the member email (e.g., username@domain.com).
- Members can click the registration link and start the standard registration flow at prescreening, then enter personal and insurance (if applicable) information.
- Note that members cannot change their email after they've registered in VAMS.

**NOTE:** 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.

# Add Additional Organization Coordinators

You can add additional organization coordinators in VAMS to assist with managing your organization.

- Navigate to the **My Members** tab.

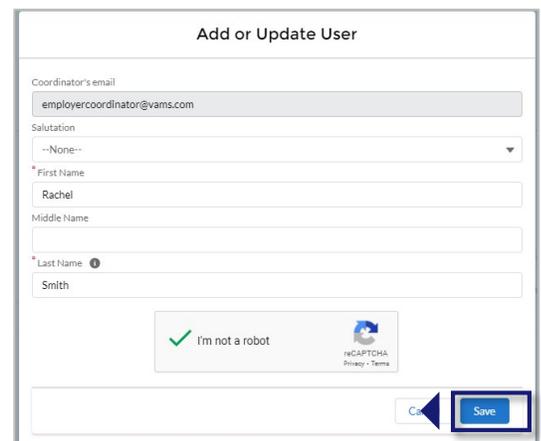


- Click the **Add Coordinator** button. This will open the **Add or Update User** pop-up window.

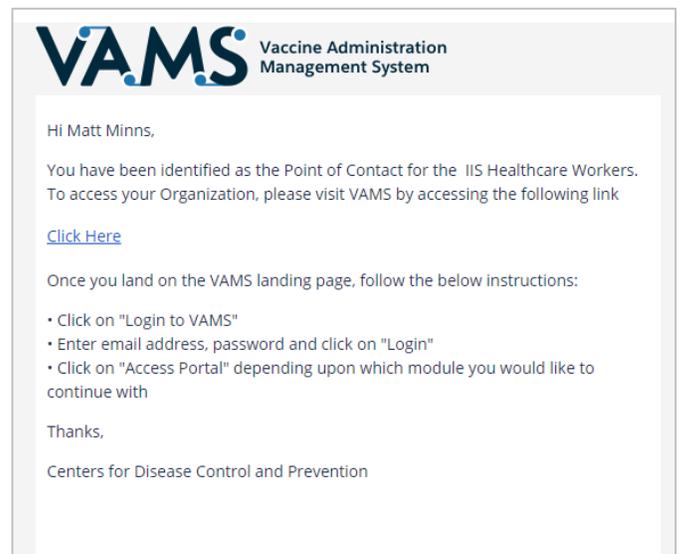
- Enter the email for the individual you wish to add as the coordinator, then click **Search**.



- If the user is already known to VAMS, their information will auto-populate in the fields within the pop-up window. Confirm the information is accurate, complete the **reCAPTCHA**, then click **Save**.
- If the user is not already known to VAMS, enter the individual's information. Complete the **reCAPTCHA**, then click **Save**.



- After you add an organization coordinator, VAMS will notify them through email (from no-reply@envelope.mail.vams.cdc.gov) that they have been added as an organization coordinator. The email will include a link to register, if applicable.



# Add Yourself as a Member of Your Organization

For you to become eligible to receive COVID-19 vaccination, you must be a member of your organization in VAMS.

- To add yourself as a member, click the **Add Member** button.
- Enter your first and last name and email address.

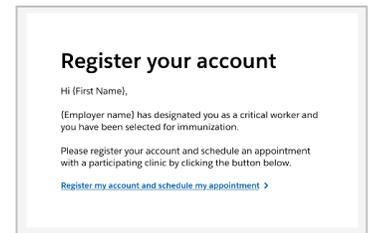
**NOTE:** Use the same email address you use for your organization coordinator log-in.



After adding yourself as a member, a **recipient registration email** is sent to you from vams@cdc.gov with a link to the VAMS landing page.

- 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 your recipient **email notification** 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**.

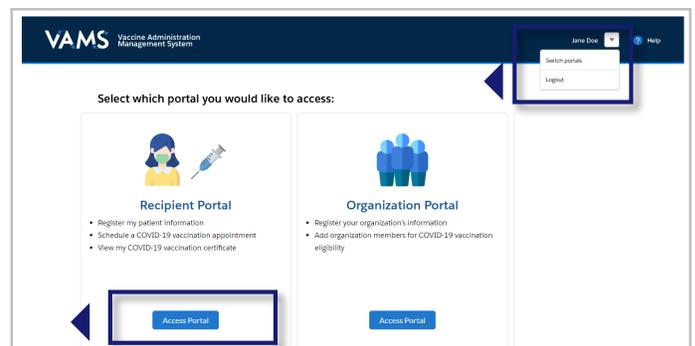
**NOTE:** Every time you log into VAMS, you must verify your identity by entering your password, and a number you receive via email or SMS, depending on the preferred contact method you choose (two-factor authentication process). After five log-in attempt failures, you will be locked out of the system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



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

- Click the **Access Portal** button below the Recipient Portal to complete your recipient registration.

**Quick Tip:** While logged into VAMS, you can switch portals by clicking the drop-down arrow next to your name in the upper right corner and selecting **Switch Portals**.



# Section 3

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## Additional VAMS Functionality

This section shows you how to perform other tasks in VAMS that are not related to registering members for COVID-19 vaccination.

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

### Members Entered in VAMS

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View and Search Member  
List

View a list of all members you entered in VAMS or search for a specific member.

Resend Member  
Registration Email

Information about registration emails and how to resend a registration email.

Edit or Remove Member

Edit member information or remove them from your organization.

### Access VAMS Support

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Access Support

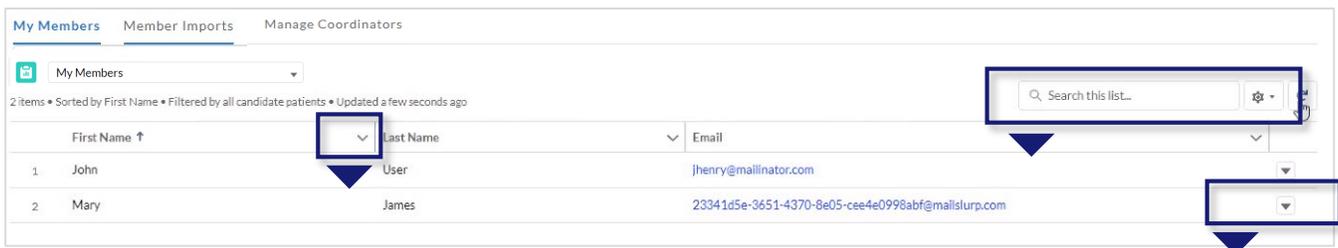
Know how to find answers to frequently asked questions about VAMS.

# Member List

View a comprehensive list of members you entered in VAMS by clicking the **My Members** tab. You can also search for a particular member, resend registration emails, and edit member information on this page (see below).

## Search for a Member

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

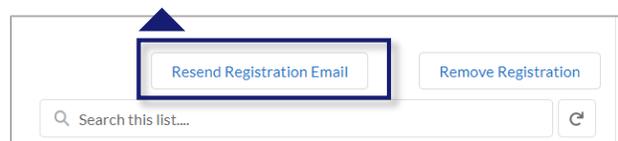
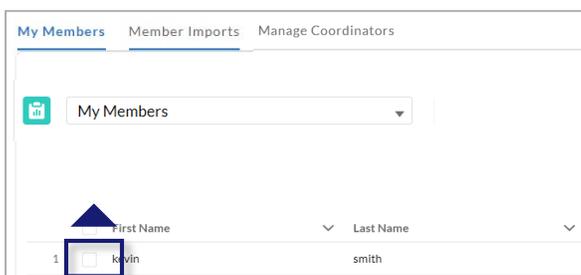


- You can search by clicking the **arrows** in the columns to sort them by the column headers (e.g., first name, email).
- You can also use the **search bar** to enter information such as first name, last name, or email address. Note that you can search for full names/email addresses or just the beginning of the recipient's name. For example, you can find the record for a recipient named William Smith by searching for "Will."

## Resend a Member Registration Email

If a member 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 up until the member registers or until 5 consecutive reminders have been sent.

You may also manually trigger the reminder email in VAMS. From the **My Members** page, select the **checkbox** next to the names of the members to which you want to resend the registration email, 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 5 times per individual.
- You cannot resend a registration email to an individual who has already registered their VAMS account.

# Member List *(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.

- On the **My Members** page, 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.



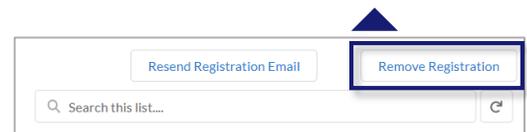
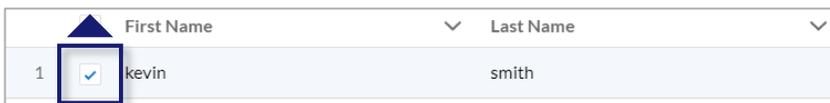
### NOTE:

- 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 members 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.

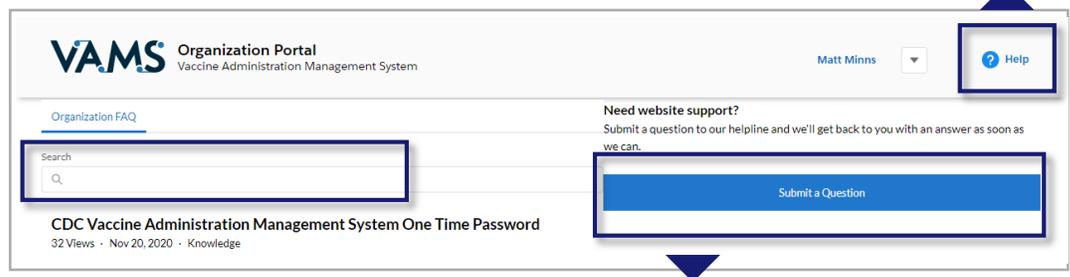
# Access Support

## Where to Find Additional VAMS Resources and Information

### Help Page

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

# Glossary of Terms

Term	Definition
.csv	A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values.
Member	An individual being added in VAMS to receive a COVID-19 vaccine.
Organization	Any institution, association, company, or other group that identifies and adds members (individuals eligible for COVID-19 vaccine) in VAMS.
Vaccination Clinic	A clinic administering COVID-19 vaccine. Sometimes referred to as a “vaccine clinic” in VAMS and this user manual.