

User Manual

Third-Party Clinic Administrator

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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.



About Third-Party Clinics

In VAMS, clinics are categorized within three main types - standard, mobile, and third-party. Third-party clinics in VAMS are denoted as clinics responsible for both adding and managing recipient records as well as administering and tracking recipient vaccination in VAMS.

In VAMS, Third-party Clinics:

- **Are not publicly searchable** and only administer vaccine to select recipients added by the clinic.
- **Do not allow for scheduling of appointments** as recipients do not self-register or self-schedule appointments in VAMS.

Outside of VAMS, third-party clinic staff must establish local processes for activities such as:

- Managing the schedule for the clinic and recipient vaccinations.
- Confirming prevaccination actions are complete.
- Notifying recipients they are eligible for vaccination at the clinic.
- Notifying recipients when they are eligible to receive their next dose of vaccine.

Third-Party Clinic User Roles:

- Include the **clinic administrator, healthcare professional, and inventory manager** roles. Since the clinic administrator can manage inventory in VAMS, filling the inventory manager role is not required, but is recommended.
- Does **not** include a front desk role because recipients will not be checked in to VAMS.

Standard and Mobile Clinic Types in VAMS

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

<i>Sub-type</i>	<i>Description</i>	<i>Examples</i>
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
--	--------------------------------------

Other - "other" can be selected if a clinic doesn't fall within one of the categories listed above.



Your Role and Activities in VAMS

Your role in VAMS is critical to the clinic’s success.

As a **third-party clinic administrator**, you will use VAMS to define and manage your clinic’s information (e.g., physical and shipping address(es), add clinic staff as VAMS users, manage your clinic’s COVID-19 vaccine inventory, and add vaccine recipients in VAMS.

NOTE: If you are your clinic’s point of contact (POC) for your jurisdiction, you will register your clinic in VAMS after activating your user account.

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

Activities	Clinic Administrator	Healthcare Professional	Inventory Manager (optional)
Serve as the clinic POC for your jurisdiction <i>(Typically, the clinic administrator also serves as the clinic POC.)</i>	✓		
Manage clinic information (e.g., physical address)	✓		
Manage (add, edit, remove) VAMS users	✓		
Manage vaccine inventory (place and track inventory requests; log and reduce inventory)	✓		✓
Add recipients in VAMS	✓	✓	
Document prevaccination actions have been completed	✓	✓	
Log vaccine administration		✓	
Track recipients’ next-dose eligibility	✓	✓	

NOTE: Your clinic **must** have the clinic administrator and healthcare professional roles filled to maintain clinic operations. Since the clinic administrator can manage inventory in VAMS, filling the inventory manager role is not required, but is recommended.

Quick Tip: Standard and mobile clinics operate differently than third-party clinics. As such, standard clinics have different role requirements and permissions. For information and instructions specific to the role of a standard or mobile clinic administrator, please contact your jurisdiction POC to request the standard Clinic Administrator User Manual.



Third-Party Clinic Administrator User Manual

This user manual is designed for [you](#).

This manual describes your role and activities (often referred to as “tasks” 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 (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 home page. 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 or to navigate to a different portal (if applicable).

Buttons

Buttons like those shown on the right allow you to start, advance, and complete tasks.



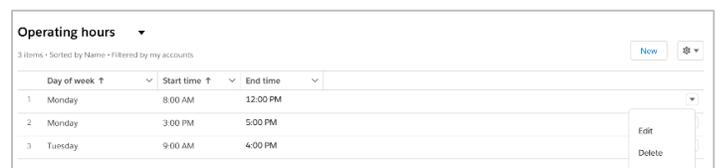
Tabs

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

Three Steps to Set Up Your Clinic in VAMS

This checklist summarizes the three steps you will take to set up your clinic in VAMS. Once completed, your clinic will be active in the system, which means:

- You or your inventory manager will be able to place vaccine inventory requests
- You or your healthcare professionals will be able to add recipients in VAMS
- Your healthcare professionals will be able to log vaccine administration

Step	What You'll Need to Complete this Step
<p><input type="checkbox"/> Step 1: Activate Your User Account in VAMS. Follow the prompts in your registration email from vams@cdc.gov to complete this step.</p>	<ul style="list-style-type: none"> • Access to the internet • Access to your email account • Registration email from vams@cdc.gov
<p><input type="checkbox"/> Step 2: Register Your Clinic in VAMS (clinic POC only). If you are the clinic's POC for your jurisdiction, your registration link will prompt you to register your clinic in VAMS immediately after activating your user account. Other administrators at your clinic will not perform this step.</p>	<ul style="list-style-type: none"> • Clinic name • Clinic type (types defined on page 3) • Primary address • Shipping address • Phone number • Clinic Facility ID • Provider PIN • Parent Org ID may also be required by your jurisdiction
<p><input type="checkbox"/> Step 3: Add Clinic Staff as VAMS Users so your clinic staff receives a registration email to activate their own VAMS account.</p>	<ul style="list-style-type: none"> • Familiarity with the VAMS Roles and Activity Matrix on page 10 (roles in VAMS include clinic administrator, healthcare professional, and inventory manager). • Email address for each user you plan to add

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**

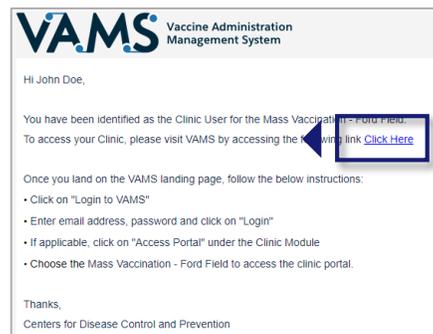
You must activate an account in VAMS to use the system. After your jurisdiction's POC enters your name and email address in VAMS, you will receive an email with a VAMS registration link.

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

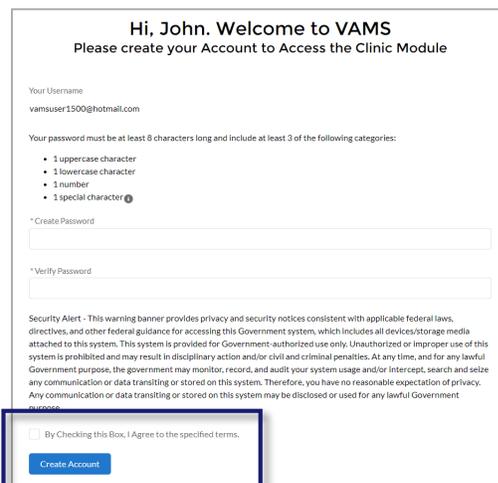
Quick Tip: If this email is not in your inbox, you may need to check your junk or spam mail folders. If you still cannot find the email, contact your jurisdiction's POC.

- 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 as 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.



Upon logging into VAMS, you will be taken to the **Vaccination Clinic Registration** page, where you will follow the instructions in [Step 2: Register Your Clinic in VAMS](#).

Step 2: Register Your Clinic *(clinic POC only)*

What you'll need to complete this step

- Clinic name
- Clinic type (types defined on [page 3](#))
- Primary address
- Shipping address
- Phone number
- Clinic Facility ID
- Provider PIN
- Parent Org ID may also be required by your jurisdiction

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

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

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

NOTES about clinic information:

- If the incorrect clinic type was selected, you may edit it by clicking the drop-down arrow in that field. **You cannot edit your clinic type after completing registration.** Be sure to confirm your selection is accurate before continuing with registration.
- Your clinic's Facility ID and Provider PIN are required to ensure your data is reported accurately. If either of those fields are blank, contact your jurisdiction POC.
- The Parent Org ID may also be required by your jurisdiction.
- **Physical and Shipping Addresses:**
 - The clinic's shipping address can be different from the physical address if you prefer vaccine to be shipped to another location.

➤ Review all information. If it is correct, **check the box** at the bottom left of the screen, then click **Finish**. If you want to make edits, click **Previous**.

CONGRATULATIONS!
Your clinic is now active in VAMS!

➤ Click the **Access Clinic Portal** button, then click the **Clinic Details** tab to begin [Step 3: Add Clinic Staff as VAMS Users.](#)



Step 3: Add Clinic Staff as VAMS Users

What you'll need to complete this step

- Familiarity with the VAMS Role and Activity Matrix below.
- Email address for each user you plan to add

NOTE: Your clinic **must** have the clinic administrator and healthcare professional roles filled to maintain clinic operations. Since the clinic administrator can manage inventory in VAMS, filling the inventory manager role is not required, but is recommended.

Adding clinic staff as VAMS users to give them access to perform their role in the system. The three VAMS third-party clinic user roles should generally align with each user's existing scope of responsibility at the clinic (e.g., the healthcare professional user role has access in VAMS to perform the activities of a healthcare professional, such as accessing a recipient record and logging vaccination).

However, as the clinic administrator, **you can assign multiple user roles to one user**, giving them access to perform additional tasks in VAMS. For example, a healthcare professional at your clinic should be assigned a healthcare professional role in VAMS. You can also assign the inventory manager role to that healthcare professional user so they have access in VAMS to place, track, log, or reduce vaccine inventory.

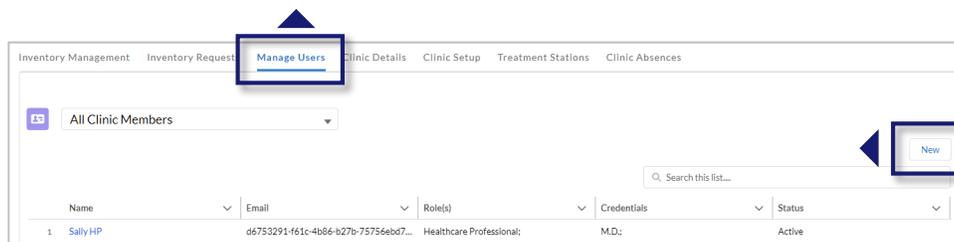
NOTE: Prior to assigning multiple roles to clinic staff, **it is important to be familiar with the matrix below** as it provides a detailed description of the access each user has based on their role(s) in VAMS.

VAMS Role and Activity Matrix			
Activity in VAMS	Third-Party Clinic User Role		
	Clinic Administrator	Healthcare Professional	Inventory Manager (optional)
Serve as a clinic POC for your jurisdiction. <i>(Typically, the clinic administrator also serves as the clinic POC.)</i>	✓		
Manage clinic information (e.g., physical address)	✓		
Manage (add, edit, remove) VAMS users	✓		
Place inventory requests	✓		✓
Log vaccine inventory when received	✓		✓
Reduce vaccine inventory	✓		✓
Add recipients and their information; document completion of Pre vaccination Actions in VAMS	✓	✓	
Access and review recipient record (name, date of birth [DOB], medical history, known allergies, etc.); add notes to record		✓	
Log vaccination (vaccine information, outcome, and waste if applicable)		✓	
Track recipients' next-dose eligibility	✓	✓	

Step 3: Add Clinic Staff as VAMS Users *(continued)*

➤ To add clinic staff as VAMS users, click the **Manage Users** tab on your Clinic Portal home page.

➤ Click the **New** button in the top right corner of the Clinic Users table.



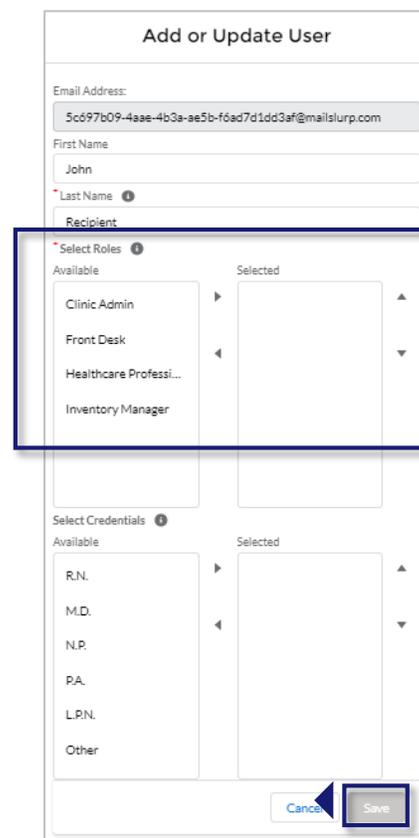
➤ In the **Add or Update User** pop-up window, enter the user's **email**, and click **Search**.



NOTE: This feature searches to see if the user's email address has already been activated in VAMS. For detailed information about adding clinic staff members who are already VAMS users for other clinics, see Multi-Clinic Users on [page 28](#) in Section 4.

➤ In the next pop-up window, enter the user's **information** and **select the role(s)** you want them to perform in VAMS.

NOTE: Prior to adding additional roles to a user's record in VAMS, refer to the Activities Matrix on the previous page for clarity on each role's access in the system.



➤ Click **Save**.

- After you click Save, a registration email will automatically be sent to the user with a registration link to set up their account in VAMS.

Quick Tip: After adding clinic staff, you can edit their information, including name and email address, by navigating to the Manage Users tab, clicking on the name of the user you want to edit, then clicking Edit in the top right corner of the page.

CONGRATULATIONS!

You have completed all three steps necessary to set up your clinic in VAMS. The next two sections will provide guidance on how to perform additional tasks in VAMS.

Section 2

Vaccine Inventory Management

This section will show you how to manage your clinic's COVID-19 vaccine inventory.

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

Place COVID-19 Vaccine Inventory Requests

The clinic administrator and/or inventory manager can submit inventory requests to your clinic's jurisdiction POC.

Track COVID-19 Vaccine Inventory Requests

Track inventory requests and communicate with jurisdiction POCs about them.

Log COVID-19 Vaccine Inventory

Log vaccine inventory manually or via 2D barcode scanner (if available).

Reduce Vaccine Inventory

Reduce vaccine inventory manually or via 2D barcode scanner (if available).

Monitor COVID-19 Vaccine Inventory Levels

Use the Inventory Management page to monitor inventory levels.



Place COVID-19 Vaccine Inventory Requests

What you'll need to place inventory requests

- Desired product type, number of doses

Managing your clinic's vaccine inventory will primarily be the inventory manager's role, but as the clinic administrator, you also have access to manage vaccine inventory in VAMS. You will submit your COVID-19 vaccine inventory requests in VAMS to your jurisdiction's POC. This crucial process will allow you to ensure your clinic has enough inventory on hand to administer vaccines to recipients.

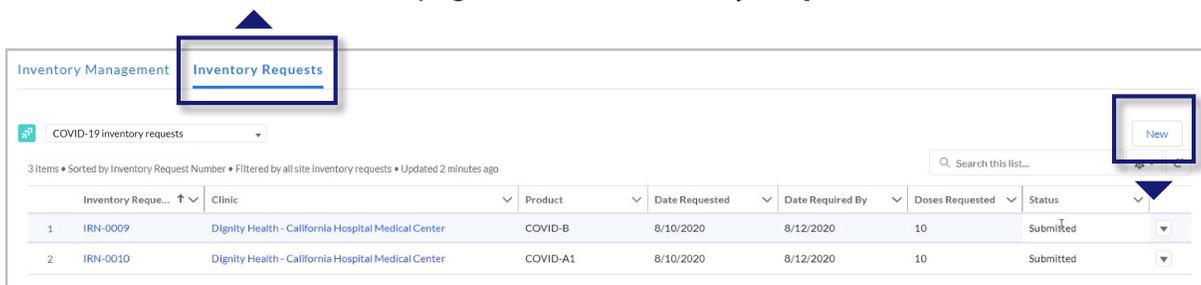
While you will place all inventory requests in VAMS, the jurisdiction POC will place all COVID-19 vaccine orders outside of VAMS through an established process determined by the jurisdiction.

NOTE: Inventory requests let your jurisdiction know how much inventory you need. An inventory request does not place an order or guarantee you will receive all inventory requested right away. The jurisdiction will place an order through their public health agency for the amount of inventory they can accommodate.

You can place, view, and manage your inventory requests on the **Inventory Requests** page in VAMS.

The Inventory Requests page shows you a list of all inventory requests you've submitted. This list includes a system-generated **inventory request number**, **product type** (vaccine type) requested, **manufacturer**, **date requested** and **required**, number of **doses requested**, and **notes**.

- From the Clinic Portal home page, click the **Inventory Requests** tab.



- Click the **New** button in the upper right corner of the Inventory Requests table.



Place COVID-19 Vaccine Inventory Requests

(continued)

- The **Create Site Inventory Request** pop-up window includes several required fields (noted by a red asterisk).

- Click in the **Product** field and select the vaccine product from the drop-down or type in the name of a product and click the Show All Results to be taken to the Product pop-up window.

- In the **Product** pop-up window, **click the number** in the Vaccine Name column of the table to select the vaccine product you want to request.

- After selecting the vaccine product, it will populate in the **Create Site Inventory Request** pop-up window.

- Enter the **number of vaccine doses** you are requesting.
- Your clinic's name will auto-populate in the clinic field. If you wish to change the clinic selection, click the "X" in the field to select from a list of clinics to which you are assigned.
- Enter the **date** of your inventory request.
- Enter the **date** by which you **want to receive** the doses you are requesting.

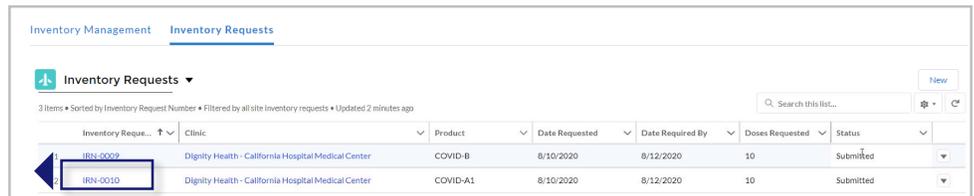
- Click **Save** to save your inventory request. VAMS will send your request to your jurisdiction POC.

VACCINE NAME	MANUFACTURER	PRODUCT	UOS NDC NUMBER	UOU NDC NUMBER	NUMBER OF DOSES IN UOU
VID-00000003	Merck	COVID-B	4615871606	4615871616	2
VID-00000002	Sanofi-Pasteur	COVID-A1	4928158905	4928158915	2

Track COVID-19 Vaccine Inventory Requests

After your inventory request is submitted, a record of that request appears on the **Inventory Requests** page. The inventory request record shows important details about the request. It also offers a way to monitor and communicate with the jurisdiction POC.

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



Inventory Reque...	Clinic	Product	Date Requested	Date Required By	Doses Requested	Status
IRN-0009	Dignity Health - California Hospital Medical Center	COVID-B	8/10/2020	8/12/2020	10	Submitted
IRN-0010	Dignity Health - California Hospital Medical Center	COVID-A1	8/10/2020	8/12/2020	10	Submitted

From the inventory request record, you can:

View Inventory Request details.

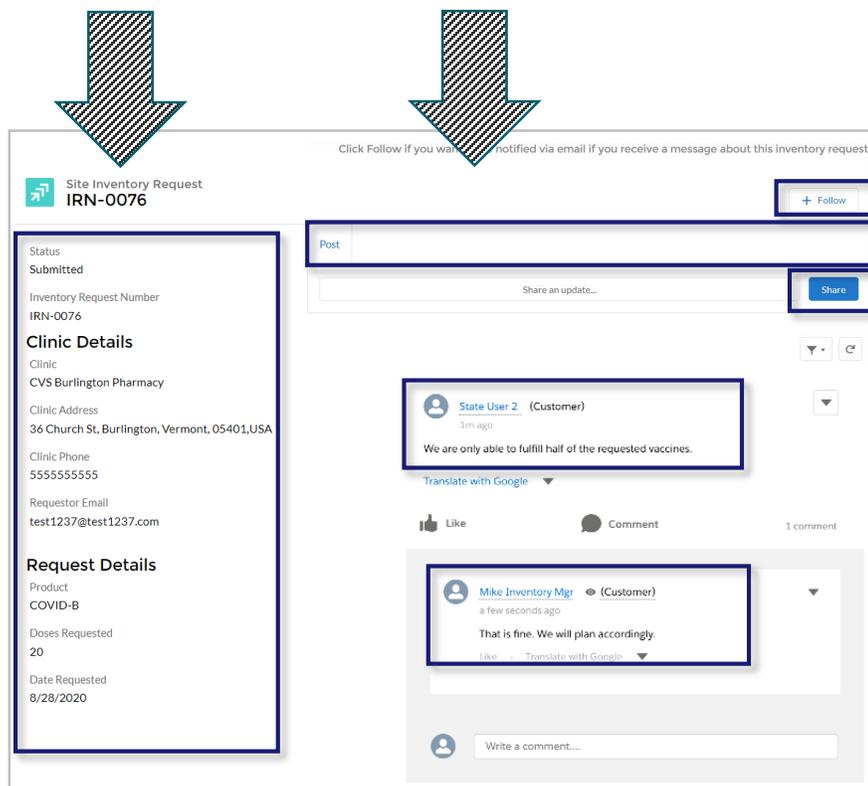
This section of the record has details about the inventory request.

Communicate with the jurisdiction POC.

Send the jurisdiction POC a message by typing in the **Post** box and clicking **Share**.

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 jurisdiction POC responds to a post you make in the inventory request record. You will **not** receive notifications for new posts.



Click Follow if you want to be notified via email if you receive a message about this inventory request.

Site Inventory Request
IRN-0076

Status
Submitted

Inventory Request Number
IRN-0076

Clinic Details
Clinic
CVS Burlington Pharmacy
Clinic Address
36 Church St, Burlington, Vermont, 05401,USA
Clinic Phone
5555555555
Requestor Email
test1237@test1237.com

Request Details
Product
COVID-B
Doses Requested
20
Date Requested
8/28/2020

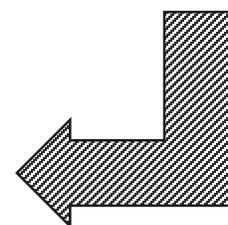
Post
Share an update... **Share**

State User 2 (Customer)
1m ago
We are only able to fulfill half of the requested vaccines.
Translate with Google

Mike Inventory Mgr (Customer)
a few seconds ago
That is fine. We will plan accordingly.
Like Comment 1 comment

Follow

Write a comment...



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.

Log COVID-19 Vaccine Inventory

When you receive a COVID-19 vaccine delivery, you can log it in VAMS in one of **two ways**:

- Manually enter the information on the vaccine packaging and vials.
- Use a 2D barcode scanner to scan the barcodes on the vaccine vials. This automatically enters the information in VAMS. **NOTE:** Current COVID-19 vaccine vials do not have barcodes that can be scanned by 2D barcode scanners, so information will have to be entered manually at this time.

Vaccine packaging terms:

- Unit of sale, or UoS, is the packaging in which the vaccine vials are delivered.
- Unit of use, or UoU, is the vaccine vial.
Example: One box, or UoS, could contain 10 UoUs, or vaccine vials.

Vaccine labeling terms:

Lot Numbers

- UoS lot number is shown on the package label.
- UoU lot number is shown on the vial label.

NOTE: UoS and UoU Lot numbers will be the **same**.

National Drug Code or NDC Numbers

- UoS NDC is shown on the package label.
- UoU NDC is shown on the vial label.

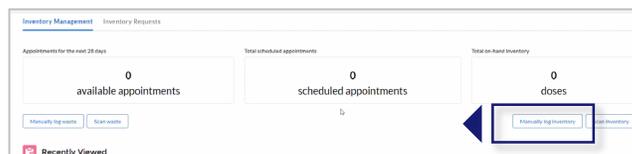
NOTE: UoS and UoU NDC numbers will **not** be the same.

Expiration Dates

- For some manufacturers, expiration dates can be found on both the UoS and UoU labels. Others supply expiration date information on their website.

Log Vaccine Inventory Manually

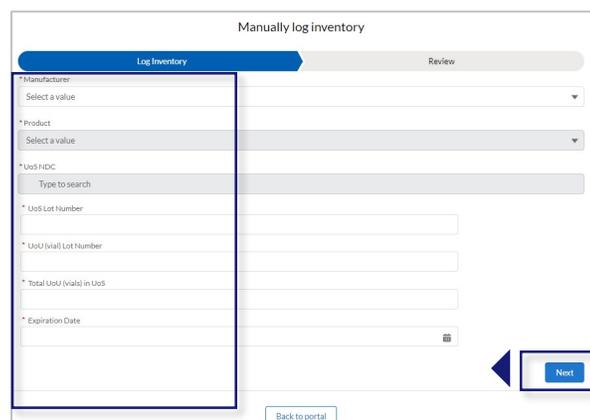
- On the Inventory Management page, click the **Manually Log Inventory** button.



- Select the **manufacturer** and **product** from the drop-down menus. Enter the remaining **vaccine information** required.

NOTES:

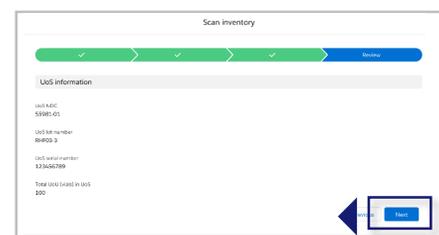
- UoU and UoS lot numbers must be an **exact** match, including case.
- It's possible you may enter new inventory that only partially matches an existing entry. If this happens, you will receive an error message. Follow the instructions in the message to invalidate the old record and add remaining inventory to a new record.



- Click **Next**.

- **Review and confirm** the information you entered is correct, then click **Next**.

- Click **Finish** in the pop-up window.



Log COVID-19 Vaccine Inventory

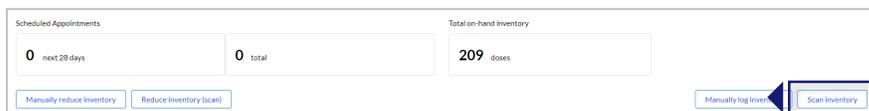
(continued)

Log Vaccine Inventory by Scanning a 2D Barcode

VAMS is compatible with 2D barcode scanners (Bluetooth wireless and those that are not wireless). However, integrated mobile device scanning (i.e., an app that can scan a 2D barcode) will not connect with or automatically transfer information to VAMS. **NOTE:** Current COVID-19 vaccine vials do not have barcodes that can be scanned by 2D barcode scanners, so information will have to be entered manually at this time.

NOTE: You **must** scan and log each UoS **individually**. Each UoS contains multiple vials or UoUs. When logging inventory, you must scan one UoU from each UoS. See the step-by-step instructions below.

- On the Clinic Portal home page, below the doses section of the Inventory Management page, click **Scan Inventory**.

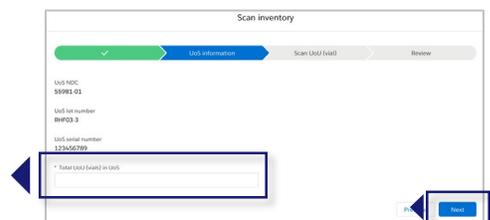


- When the Scan Inventory pop-up appears, **scan the UoS barcode** on the vial with your 2D barcode scanner. The barcode will appear in the UoS barcode field.

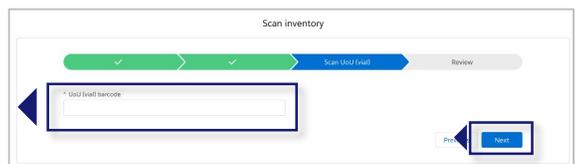


- Select the vaccine **manufacturer** from the drop-down menu, then click **Next**.

- The UoS Information screen will appear with prepopulated UoS information. **Enter** the Total UoU (vials) in UoS, then click **Next**.



- **Scan** the UoU barcode on one of the vials from the UoS you are logging, and it will appear in the UoU barcode field. Click **Next**.



- **Review** and confirm the information you entered is correct, then click **Next**.
- Click **Finish** in the pop-up window.

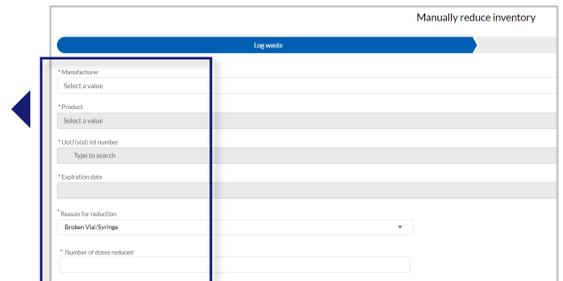
Reduce Vaccine Inventory

Reduce vaccine inventory manually or via 2D barcode scanner (if available).

Similar to how you log vaccine inventory, you can reduce vaccine inventory in VAMS in **two different ways**: Use a 2D barcode scanner to scan the barcodes on the vaccine vials so the information is automatically entered in the system, or manually enter the information.

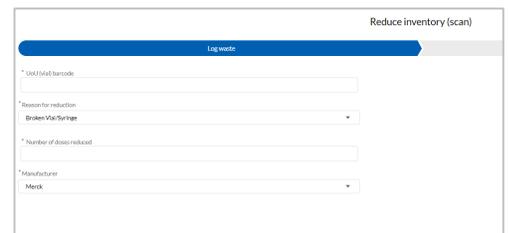
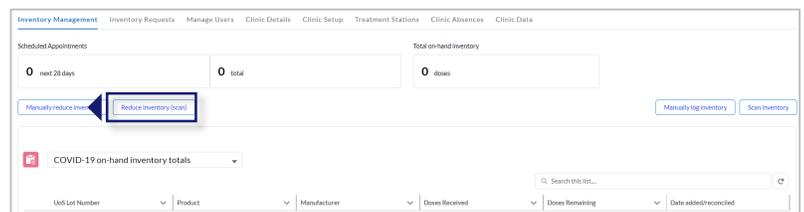
Reduce Vaccine Inventory Manually

- On the Inventory Management page below the available appointments data, click the **Manually Reduce Inventory** button.
- In the Manually Reduce Inventory pop-up window, enter the manufacturer name, product, and UoU lot number.
- The expiration date will auto-populate and cannot be changed.
- Select the **reason for reduction**.
- Enter the **number of doses reduced**, then click **Next**.
NOTE: VAMS will not allow you to reduce more inventory than you have on hand.
- **Review and confirm** the information you entered is correct, then click **Next**.
- Click **Finish** in the pop-up window.



Reduce Vaccine Inventory by Scanning a 2D Barcode

- On the Inventory Management page below the available appointments data, click the **Reduce Inventory (Scan)** button.
- When the Reduce Inventory (Scan) pop-up window appears, **scan the UoU barcode** on the vial with your 2D barcode scanner.
- **Enter** the required information in the Reduce Inventory pop-up window. The expiration date will auto-populate and cannot be changed. Click **Next**.
- **Review and confirm** the information you entered is correct, then click **Next**.
- Click **Finish** in the pop-up window.





Monitor COVID-19 Vaccine Inventory Levels

Clinic administrators and inventory managers can use the Inventory Management page to monitor inventory levels.

The screenshot displays the 'Inventory Management' page with two tabs: 'Inventory Management' (active) and 'Inventory Requests'. Under 'Inventory Management', there are two sections: 'Scheduled Appointments' and 'Total on-hand inventory'. The 'Scheduled Appointments' section has two dropdown menus: 'next 28 days' and 'total'. Below these are two buttons: 'Manually log waste' and 'Scan waste'. The 'Total on-hand inventory' section shows a large box with the number '7540' and the text 'doses' next to it. Below this are two buttons: 'Manually log inventory' and 'Scan inventory'.

This page gives you a snapshot of:

- The total number of vaccine doses your clinic has in its total **on-hand vaccine inventory**.*
- For now, the Scheduled Appointments fields will appear but do not apply to third-party clinics.

*The total on-hand inventory data on this page come from the inventory you log and reduce in VAMS as well as what the clinic healthcare professional logs during vaccine administration. The healthcare professional's method of logging inventory and waste is similar to yours. They can either scan a 2D barcode or log the information manually.

Section 3

Manage Recipients in VAMS

Since vaccine recipients will not be creating their own account and entering their medical history in VAMS, they will need to be added in VAMS by you as the **clinic administrator** or by a **healthcare professional**.

You will need the following information about the recipient to add them in VAMS:

- First and last name
- Gender
- Ethnicity and race
- Whether the prevaccination actions have been completed. **Prevaccination actions** include screening the recipient for contraindications, providing the Emergency Use Authorization (EUA) Fact Sheet or a Vaccine Information Statement (VIS) depending on the vaccine product(s) available to the recipient, and acquiring authorization, if required. If the prevaccination actions have not been completed, you or the healthcare professional can edit this response at any time after the recipient has been added in VAMS.
- Insurance information (if applicable)
- Medications (if applicable)
- Other relevant medical information (if applicable)

There are two ways to add recipients in VAMS—one at a time or via bulk upload.

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

Add Recipients One at a Time

Manually add recipients in VAMS one at a time.

Bulk Upload Recipients

Fill in the most recent version of the Recipient Import Template to bulk upload multiple recipients in VAMS.

Document Prevaccination
Actions

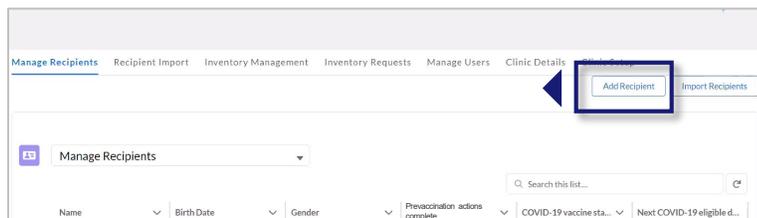
Both the clinic administrator and the healthcare professional at a third-party clinic can document the completion of Prevaccination Actions.

Track Next-Dose Eligibility

Both the clinic administrator and the healthcare professional at a third-party clinic can track next-dose eligibility.

Add Recipients One at a Time, via Bulk Upload

➤ Click the **Add Recipient** on the **Manage Recipients** page, which is also your third-party clinic's home page in VAMS.

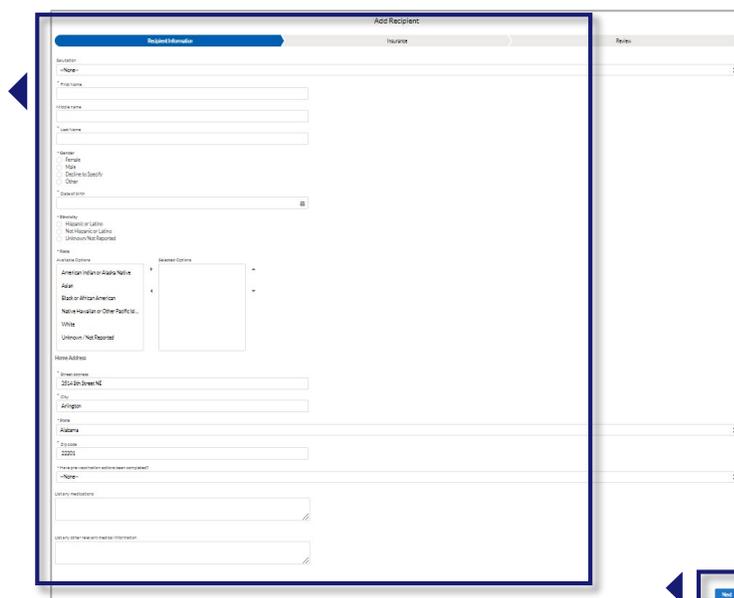


➤ Enter the **recipient's information**. The recipient's home address will default to the third-party clinic's address in VAMS. Click **Next**.

➤ Enter the **recipient's insurance information** (if applicable). Click **Next**.

➤ **Review** all information entered on the Add Recipient pages and **verify** everything is correct. If so, click **Next**. If not, click **Previous** to make corrections.

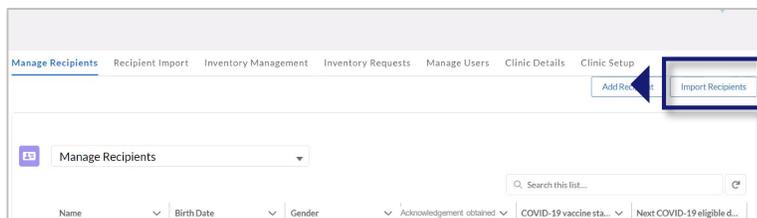
➤ After clicking **Next**, the recipient's record is saved in VAMS.



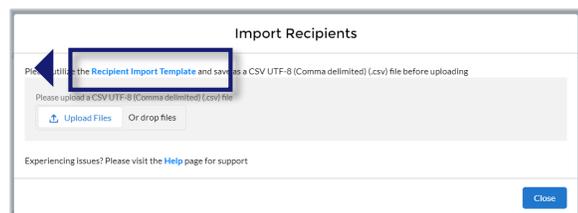
Add Recipients via Bulk Upload

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

➤ Click **Import Recipients** from the **Manage Recipients** page.



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

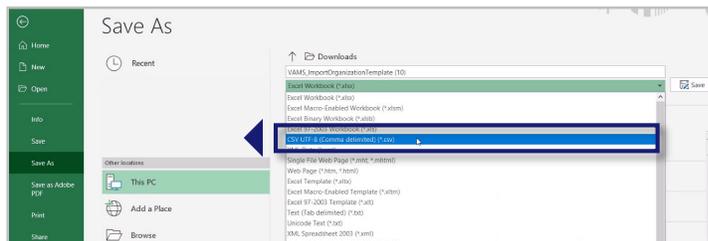


Add Recipients via Bulk Upload *(continued)*

Add Recipients via Bulk Upload *(continued)*

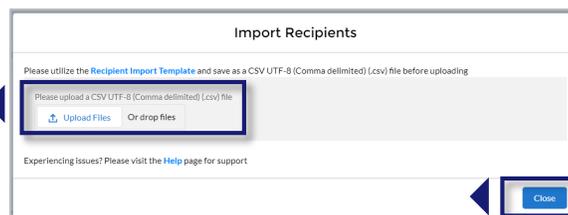
Important Notes About the Recipient Import Template File:

- The file opens on your computer as an .xlsx file, but you **must** save it as a “CSV UTF-8” (comma delimited or .csv) file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.
- You **must** use the most recent version of this template when uploading a list of recipients in VAMS. Please ensure you download the latest version of the import template each time you attempt to bulk upload recipients in VAMS to take advantage of constant improvements and to avoid data issues/inconsistencies.
- All fields within the template marked with an asterisk are required. VAMS will not upload a recipient if any of the required fields are left blank.
- Fields that contain a pick list or drop-down options **must** contain a selection.
- The recipient’s DOB must be in MM/DD/YYYY format.
- VAMS will not upload **duplicates** if someone is listed in the csv file multiple times or if they have already been added in VAMS. The system identifies duplicates using a combination of the recipient’s first name, last name, and DOB.
- There is a file size limit of 25 MB.
- You are limited to uploading a maximum of 9,999 recipients at one time. If the file contains 10,000 or more recipients, the following error message will appear: "The file uploaded has more than 9,999 records which exceeds the limit of the Import Functionality. Please try again."



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.

- Open the file and enter the **recipients’ 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 Recipients pop-up window. You can also drag and drop your organization list in the “Drop Files” area of the page.
- Click **Close**.



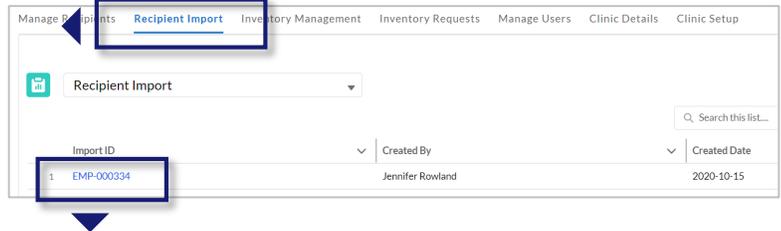
Add Recipients via Bulk Upload *(continued)*

Confirm Bulk Upload

After importing a list of recipients, the following processes automatically occur in VAMS:

- A message will appear on screen that your list is in the import queue.
- After your list has processed, you will receive an email from vams@cdc.gov, stating it is uploaded.
- A result log will appear on the Recipient Import page.

➤ Click the **Recipient Import** tab to check the results of your bulk upload.

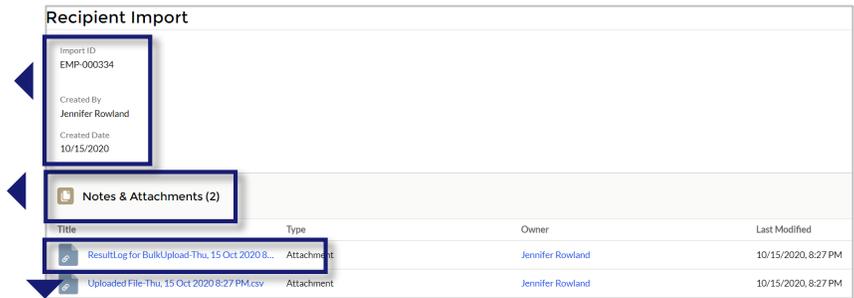


- On the **Recipient Import** page, you will see information about your upload, including the system-generated Import ID number, who imported the list, and when it was imported.

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

There are two main sections on the **Import Details** page:

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



- 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 recipient was added in the system.

	A	B	C	D	E	F
1	First Name	Middle Name	Last Name	Status		
2	Joan		Crawford	Success		
3	Edward		Rowland	Success		
4	Kelsey		Bridges	Insert failed due to blank values		

- All recipients who have a status of **Success** have been uploaded in the system.

- Recipients whose statuses include an error message were not uploaded in the system; the message will tell you why.

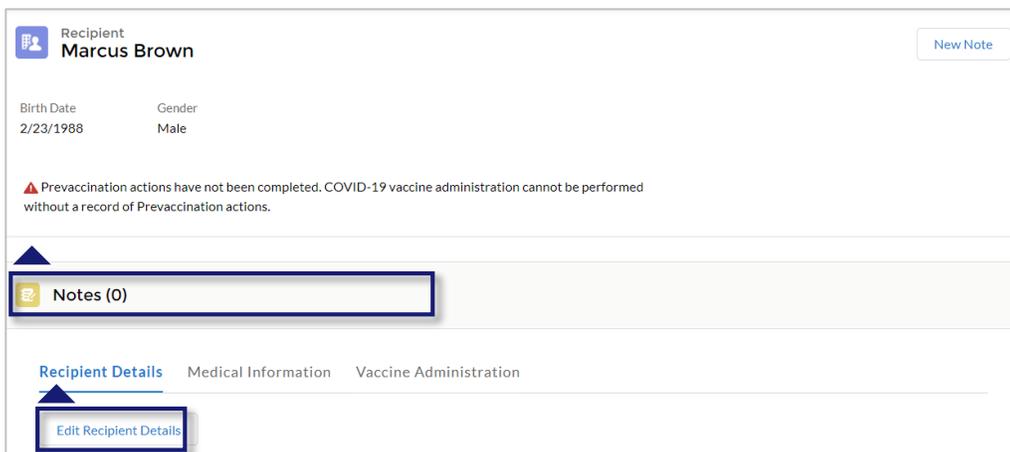
Quick Tip: After adding recipients, you can edit their information, including name and home address, and whether their Pre vaccination Actions have been completed by navigating to the Manage Recipients tab, clicking on the name of the user you want to edit, then clicking Edit Recipient Details under the Recipient Details tab.

Document Completion of Prevaccination Actions

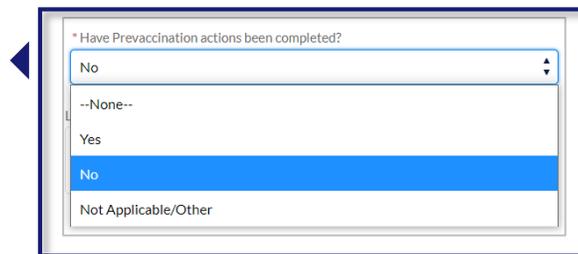
Both the clinic administrator and the healthcare professional at a third-party clinic can document the completion of Prevaccination Actions. Prevaccination Actions will vary by clinic but can include things such as screening the recipient for contraindications, providing the Emergency Use Authorization (EUA) Fact Sheet, and acquiring authorization, if required.

You will need:

- Recipient’s name
-
- Search for a recipient’s record in the Manage Recipients table.
 - You can **search** by name using the search bar in the table header. Note that you can search for full names 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.”
 - Click a recipient’s name in the Manage Recipients table to access their **recipient record**.
 - After accessing the recipient record from the Manage Recipients page, you will see an alert that indicates whether a recipient’s prevaccination actions are complete.



- To update this response to indicate their prevaccination actions are complete, click **Edit Recipient Details** in the Recipient Details tab.
- **Select a response** from the drop-down menu, then click **Next** through the Insurance and Review pages.

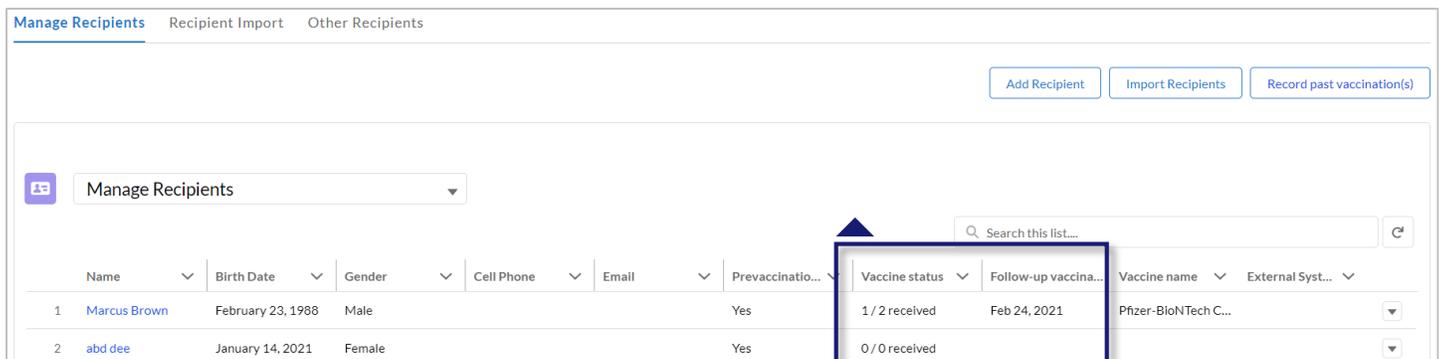


Track Next-Dose Eligibility

Both the clinic administrator and the healthcare professional at a third-party clinic can track next-dose eligibility. The **Manage Recipients** page contains a list of the recipients who have been added in VAMS. This list includes key information that will help you keep track of **how many doses** each recipient has received as well as the **date they are eligible to receive their next dose**. You can use this page to track recipient next-dose eligibility outside the recipient record.

- Navigate to the **Manage Recipients** page.
- Review the **recipient list**.
- Review the **COVID-19 vaccine status** column
- Review the **Next COVID-19 eligible date** column.

The recipient is eligible for their next dose of COVID-19 vaccine on or after the date listed in the Next COVID-19 eligible date column.



The screenshot shows the 'Manage Recipients' page with a table of recipients. A blue box highlights the 'Vaccine status' and 'Follow-up vaccination date' columns for two recipients.

Name	Birth Date	Gender	Cell Phone	Email	Prevaccination...	Vaccine status	Follow-up vaccina...	Vaccine name	External Syst...
1 Marcus Brown	February 23, 1988	Male			Yes	1 / 2 received	Feb 24, 2021	Pfizer-BioNTech C...	
2 abd dee	January 14, 2021	Female			Yes	0 / 0 received			

Section 4

Clinic Management in VAMS

You can use VAMS to perform tasks such as managing your clinic's information and user access as well as access clinic data reports.

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

Manage Clinic Info

Manage clinic physical and shipping address(es); update your clinic's Facility ID, Provider PIN, Parent Org ID; deactivate your clinic.

Manage Clinic Users

Edit a user record, remove a VAMS user, or add a multi-clinic user.

Manage Clinic Information

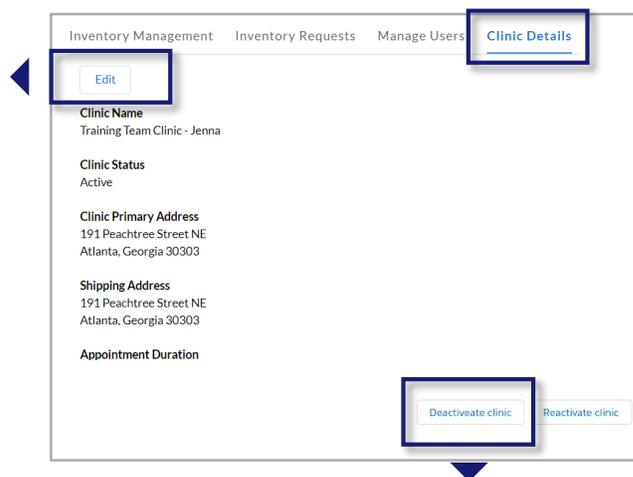
Access and edit information such as your clinic’s physical and shipping address(es); update your clinic’s Facility ID, Provider PIN, or Parent Org ID; deactivate your clinic in the Clinic Details and Clinic Setup tabs.

Clinic Details Tab

In this tab you can:

- Update your shipping address for inventory.
- Deactivate or reactivate your clinic in VAMS.
- Update your IIS Facility ID, Provider PIN, or Parent Org ID.
- For now, the appointment duration field will appear but does not apply to third-party clinics.

- Click the **Clinic Details** tab, then click the **Edit** button above your clinic’s name to edit the shipping address.



Deactivate your clinic when it is no longer needed to administer COVID-19 vaccines.

- Click the **Deactivate Clinic button** in the bottom right corner of the page.

- A Deactivate Clinic pop-up appears and asks you to **confirm deactivation**. It also gives you the number of total booked appointments and vaccines in the clinic’s inventory.

- Click **Deactivate Clinic** to continue. If you change your mind, click **Cancel**. This closes the pop-up window and redirects you to the Account page.



NOTE: Deactivating a clinic in VAMS triggers the system to:

- Send an email to the jurisdiction POC informing them the clinic is deactivated.
- Deactivate all vaccine inventory requests.

Deactivating a clinic does not remove user permissions in VAMS.

- Once a clinic is deactivated, you must remove each clinic user from the system following the same process outlined in [Manage VAMS Users](#).



Manage Clinic Information

(continued)

Clinic Setup Tab

In this tab you can access your clinic's location record and:

- Update your clinic's physical address.
- For now, available for scheduling, time zone, and start and end date fields will appear but do not apply to third-party clinics.

- Click the **Clinic Setup** tab, then click your **clinic's name** in the Clinic Location table.
- Click the **Edit** button in the upper right corner of the **Clinic Location** page.

	Clinic Location Name	Address	Start Date	End Date	Status
1	Bloomfield Clinic	4120 W Maple Rd #204 Bloomfield H...	10/13/2020		Active

Edit Clinic Location

*Clinic
Garner Street Clinic

Available for Scheduling?

*Clinic Location Name
Garner Street Clinic

*Street Address 1
331 E Gardner St NW

*City
Sparta

*State
Michigan

*Zip/Postal Code
39345

*Country
United States

*Time Zone
America/New_York

*Start Date
Dec 2, 2020

*End Date
Dec 2, 2020

*Clinic Operating Hours
 Standard M-F Hours

Cancel Save

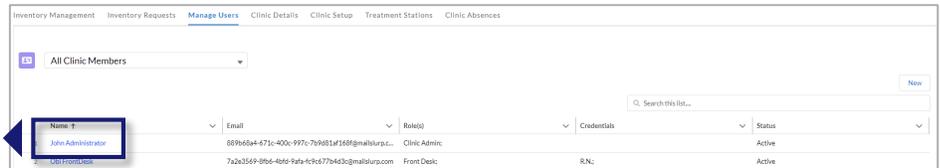
Manage VAMS Clinic Users

Edit a user record, remove a VAMS user, or add a multi-clinic user.

Edit or Remove a VAMS Clinic User

You can edit a VAMS user's record or remove them from the system on the **Manage Users** page.

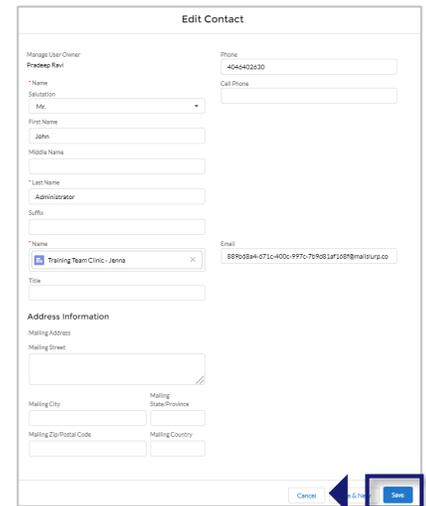
- To **edit a user's information**, click the **user's name** in the Clinic Members table.



- On the user's information page, you can **edit** the user's details by clicking the **Edit** button in the upper right corner or **remove** the user by clicking the **Remove** button.



- If you edit the user's record, click **Save**.



If you click the Remove user button, another pop-up window will appear and ask you to confirm that you want to remove the user.

- Answer **Yes** or **No** and click **Next**.



Manage VAMS Clinic Users

(continued)

Multi-Clinic Users: Add a clinic user who is already a registered VAMS user

You can add a user to your clinic who is already a registered VAMS user at another clinic. The system will recognize the user through their email address.

- In the **Add or Update User** pop-up window, enter the user's **email** and click **Search**.

NOTE: This feature searches to see if the user's email address has been used to create an account in VAMS.

- In this example, the healthcare professional (HP) added to the clinic is already a VAMS user. You will know this because the HP's first and last name is populated in those fields, and roles are already selected for them.
- **The roles they are assigned by another clinic's administrator carry over to your clinic.** Similarly, roles you select for them will carry over to any other clinic for which they are a VAMS user.

For example: If you select the inventory role for your new HP, they will also have that role at all other clinics for which they work. Similarly, if you remove the inventory manager role from this HP, they will no longer have that role at any other clinic for which they work.

- After you add them as a user in your clinic, they will receive an **email notification** from vams@cdc.gov that they are identified as a user for your clinic, with a link for them to log into the VAMS portal.
- After logging in and accessing the **Clinic Portal**, they will see all clinics they are linked to in VAMS, including yours.

Section 5

Additional VAMS Functionality

This section will show you how to perform other infrequent activities in VAMS, such as accessing VAMS support, or actions that will only apply to certain users, such as those who work at multiple clinics.

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

Multi-Clinic User

Access different clinics in VAMS if you work at multiple vaccination clinics.

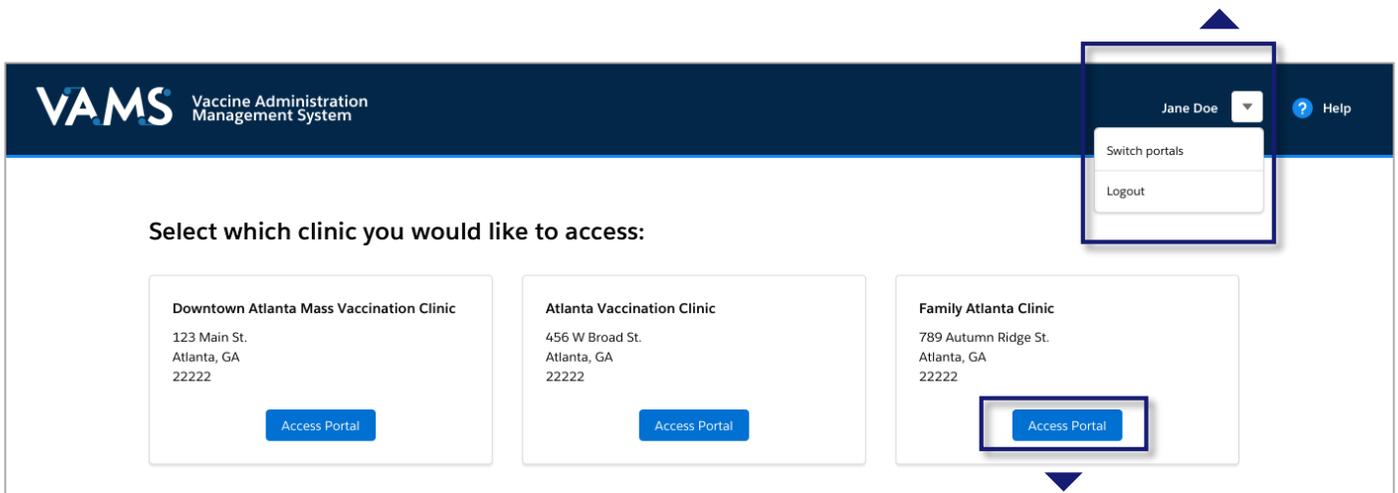
Access Support

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

Access Multiple Clinics in VAMS

You may need to perform the same or different user roles at multiple clinics. After the clinic administrator at each clinic adds you as a user for their clinic, you can easily access multiple clinics after logging into VAMS.

- From any page in VAMS, click the **drop-down arrow** next to your name in the upper right corner to access the drop-down menu.
- Click **Switch Portals**.
 - If you have multi-portal access (i.e., you have access to more than one portal—Clinic Portal and Recipient Portal, for example) this will take you to the **portal selection page**. Click the **Clinic Portal** button, then you will see the **clinic selection page** shown below.
 - If you only have multi-clinic access (i.e., you have a clinic role at more than one clinic but do not have access to another portal), clicking **Switch Portals** will take you straight to the **clinic selection page**.



The screenshot displays the VAMS interface. At the top left is the VAMS logo and the text 'Vaccine Administration Management System'. In the top right corner, the user's name 'Jane Doe' is shown with a dropdown arrow, and a 'Help' icon is visible. A dropdown menu is open, showing 'Switch portals' and 'Logout' options. Below the header, the text 'Select which clinic you would like to access:' is centered. There are three clinic cards, each with an 'Access Portal' button. The first card is for 'Downtown Atlanta Mass Vaccination Clinic' at 123 Main St, Atlanta, GA 22222. The second card is for 'Atlanta Vaccination Clinic' at 456 W Broad St, Atlanta, GA 22222. The third card is for 'Family Atlanta Clinic' at 789 Autumn Ridge St, Atlanta, GA 22222.

- From the **clinic selection page**, choose which clinic you want to switch to by clicking the **Access Portal** button under the clinic name.

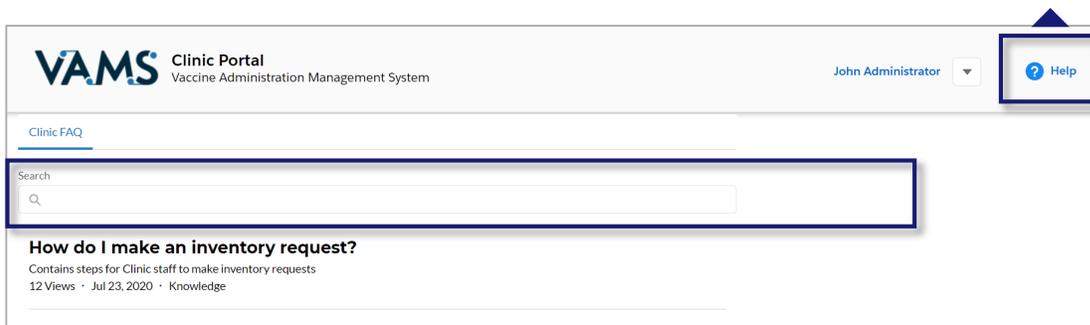
Access Support

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.

Thank you for your question, we will get back to you shortly.

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
2D Barcode	A two-dimensional barcode that stores information vertically and horizontally. It may contain the vaccine product identification information, lot number, and expiration date.
Member	An individual being added in VAMS to receive a COVID-19 vaccine.
Multi-Clinic User	A clinic user who performs the same or different roles at multiple clinics registered in VAMS. This user can switch between clinic accounts within the Clinic Portal.
Multi-Portal User	A VAMS user with access to multiple VAMS portals (e.g., a clinic administrator who is 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.
Third-Party Clinic	Clinics responsible for both adding and managing recipient records as well as administering and tracking recipients in VAMS.
Unit of Sale (UoS)	The packaging in which the vaccine vials are delivered.
Unit of Use (UoU)	The vaccine vial.
Vaccination Clinic	A clinic administering COVID-19 vaccine (sometimes referred to as a “vaccine clinic” in VAMS and this user manual).