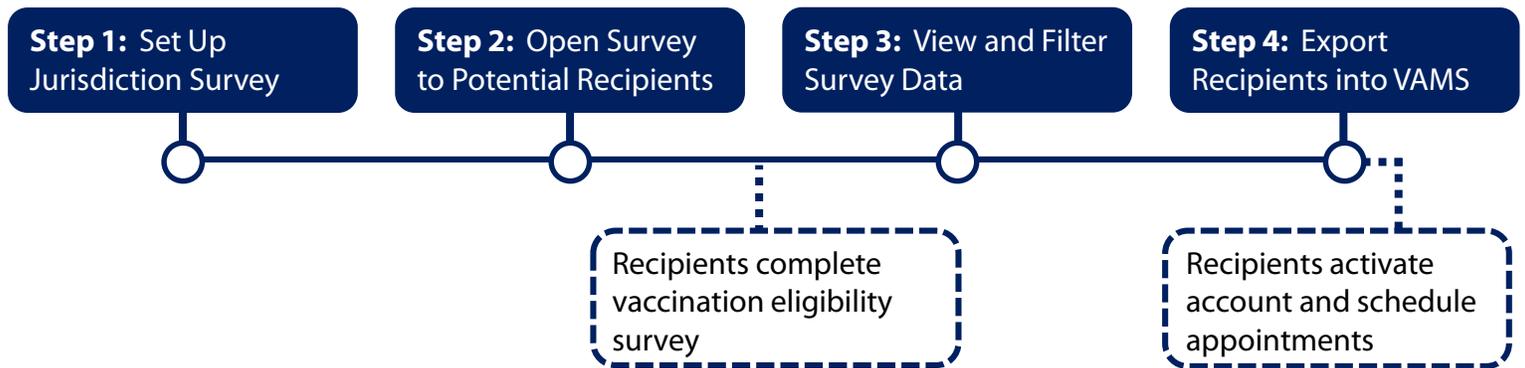


# Flexible Registration

## What Is Flexible Registration?

The VAMS flexible registration tool is a survey tool that allows jurisdictions to collect demographic and personal information about potential vaccine recipients in their jurisdiction and add them into VAMS. Potential vaccine recipients will fill out a survey collecting relevant information about their vaccination eligibility. Jurisdictions can then use the survey results to filter and find recipients who align with their vaccine rollout plans, using the tool to upload them into VAMS.



## Steps 1 and 2: Recipient Survey Creation and Distribution

Each jurisdiction will have its own semi-customizable survey to collect demographic information for vaccination eligibility purposes. Jurisdiction points of contact (POCs) will work with their onboarding specialist to assist with customization needs.

### Jurisdiction POCs may customize:

- Which questions are shown to recipients (**NOTE:** questions and answers cannot be edited)
- Survey welcome message
- Completed survey confirmation message (within survey)

### Jurisdiction POCs may not customize:

- Question verbiage
- Answer verbiage
- Which answers are shown within each question
- Completed survey confirmation email

After customizing their survey, jurisdiction POCs will receive a unique link for their survey. Once jurisdictions make the link available to their population (e.g., embed it in their jurisdiction's website or send using other communication mediums), potential vaccine recipients will:

- Click** the link to begin the registration process.
- Fill** out the questions on the survey. Preregistration surveys may collect the following information:
  - Age group/DOB
  - Living situation (nursing home, group home, homeless)
  - Residency area (rural or non-rural)
  - Priority group status by job (healthcare worker, frontline essential worker, or other essential worker groups)
  - Comorbidities
  - Contact information (first name, last name, ZIP code, email)

# Flexible Registration

## Steps 1 and 2: Recipient Survey Creation and Distribution *(continued)*

- Click** the **Submit** button in the bottom left corner to submit the survey. After submitting, potential vaccine recipients will receive a confirmation message and an email confirming their preregistration status.
  - After successful submission, potential vaccine recipients may click the Reset button to clear the form and begin filling it out for another individual.

### Key Considerations:

- **Unique email required for survey.** Potential vaccine recipients must use a unique email address to register. If an individual attempts to preregister with an email address already submitted with the preregistration survey or already within VAMS, they will receive an error message asking them to try again with a different email address.

## Steps 3 and 4: Filter Data and Export Recipients into VAMS

After an individual submits their survey, their response is added to a data repository for their jurisdiction. Up to 10 jurisdiction POCs per jurisdiction can use the flexible registration export portal to access their jurisdiction's survey data, filter the data to find potential vaccine recipients who are eligible per the jurisdiction's vaccine rollout plan, and add them into VAMS.

To begin exporting recipients after receiving access to the system, jurisdiction POCs will:

- Log into** the flexible registration export portal with their user name and password.
- Filter** their jurisdiction's survey data. Jurisdiction POCs may select or deselect checkboxes for group(s) to filter their data based on groupings for current vaccination eligibility.
  - Selecting N/A for a question means this question will not be filtered. All records will be returned, including blanks.
  - Unchecking everything in a section will return records without responses to those questions.
  - Checking responses other than N/A will return those responses.
- Click** the **Count** button. This will trigger a count of the number of individuals in the group(s) selected.
  - The initial count must be 100,000 records or less or the **Preview Results** button and **Export to VAMS** button will not be available. Jurisdiction POCs must adjust their groupings and filters until the number is less than 100,000 to proceed to the next step.
- Use the **Preview Results** button once the initial count is less than 100,000 records to preview the list of individuals for export into VAMS and download their data to maintain and store records. Although the initial count may be for up to 100,000 records, you may only preview and export a maximum of 50,000 records at a time. By **inputting** a whole number less than or equal to 50,000 in **the Preview Limit** field and **clicking** the **Preview Results** button, jurisdiction POCs will trigger a download of the data containing the number of individuals up to the number in the **Preview Limit** field (e.g., a count of 15,000 will only allow a preview of 15,000 even if the preview limit is set to 50,000). **Opening** the Excel file allows jurisdiction POCs to view and filter the data of each individual being uploaded into VAMS. These data include an individual's preregistration time stamp,

## Flexible Registration

### Steps 3 and 4: Filter Data and Export Recipients Into VAMS *(continued)*

jurisdiction location, living situation, rural (Y/N), healthcare worker status, frontline worker status, essential worker status, comorbidities, first name, last name, email address, ZIP, and phone number.

- **Be sure to use the preview button before each export if you wish to maintain a list of exported records.** After exporting to VAMS, you will **not** be able to run another preview on the same data set since the data have been moved from the survey and exported into VAMS.

**Export** individuals into VAMS. **Set** the number in the **Export Limit** field up to 50,000 based on the number of individuals in the count. Once you are ready to export, **click** the **Export to VAMS** button. Upon successful export, a success notification will appear below the button.

- After a successful export, the individuals added into VAMS will receive an email from VAMS to activate their account in the system. From there, they may begin to schedule an appointment in the system.

If over 50,000 results were originally queried, jurisdiction POCs may **click** the **Count** button again to update their query. Upon clicking the button, the count will update and subtract the number of individuals who were recently exported to VAMS. **NOTE:** To prevent duplicate exports, wait until the progress message shows all records have been exported and the success message appears before running another query.

To export a different group, you may refilter the data and begin the above process again. **NOTE:** You may only export up to 200,000 total records per day.

#### Key Considerations for VAMS Recipient Export:

- **10 jurisdiction POCs** per jurisdiction may have access to the flexible registration export portal. Please work with your onboarding specialist to request access. **NOTE:** This login will be separate from your VAMS account credentials.
- Export is a background process and takes time to complete. After running an export, wait until the progress message disappears and you receive a successful export message before running another query in order to prevent duplicate exports.
- Jurisdictions each may export **up to 200,000** total records per day.
- Although you can only preview and export 50,000 records at a time, you can initially sort and run a count on up to 100,000 records. If you have over 50,000 records in your count, you will need to run a second export to export the remainder of records to VAMS. After the initial export, you can click the **Count** button to confirm the records were imported successfully. If so, the number displayed will reduce by the number of individuals last exported into VAMS since they have been exported and, therefore, removed from the data set.
- Use the **Preview Results** button after a count as a way to maintain records of individuals uploaded in VAMS. Clicking the button will open a list of individuals with their survey data that you then may download as an Excel file and use for your records. Do this after every upload to maintain an accurate list of all individuals who have been exported to VAMS. **NOTE:** At this time, there is no way to see the full list of all individuals who have submitted a survey.

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 – Friday