VAMS

Vaccine Administration
Management System

User Manual

Clinic Administrator
Third-Party Clinic

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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 (if recipients do not elect to receive communications from VAMS)

Third-Party Clinic User Roles:

- Include the **clinic administrator**, **healthcare professional**, and **inventory manager** roles Since the clinic administrator can manage inventory in VAMS, you are not required to fill the inventory manager role, but we recommend it.
- 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 - uses all four clinic user roles, searchable by recipients in VAMS

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

Mobile - uses 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 your clinic's success.

As a **third-party clinic administrator**, you will use VAMS to define and manage your clinic's information (e.g., shipping address, 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 and some that you share with other users. A more detailed VAMS Role and Activity Matrix is available on page 13.

Activity in VAMS	Clinic Administrator	Inventory Manager *(optional)*	Healthcare Professional
Serve as the clinic POC for your jurisdiction. *(Typically, the clinic administrator serves as the clinic POC.)*	✓		
Manage clinic information (e.g., shipping address).	✓		
Manage (add, edit, remove) VAMS clinic users.	✓		
Manage clinic COVID-19 vaccine inventory.	✓	✓	
Add vaccine recipients and their information in VAMS.	✓		
Administer and log vaccination.			✓
Track vaccine recipient next-dose eligibility date(s) (if applicable).	✓		✓

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, you are not required to fill the inventory manager role, but we recommend it.

Quick Tip: Standard and mobile clinics operate differently than third-party clinics. As such, standard and mobile clinics have different role requirements and permissions. For information and instructions specific to the role of a standard and mobile clinic administrator, please visit CDC's COVID-19 Vaccination Reporting Data Systems site to access the Standard and Mobile Clinic User Manuals.

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).
Access Support	Buttons like the one pictured also link to other pages in this user manual.

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.

👤 **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/vams-non-recipient-login) and log in with your user name and password (see the next page for how to activate your VAMS account).
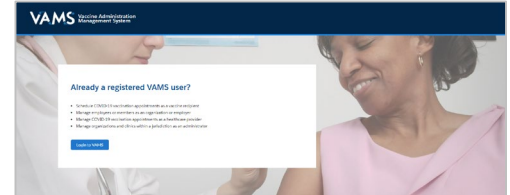
**The components listed below are in VAMS to help you navigate the system.**

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.

- The **drop-down menu** located next to your name in the upper right corner of the page allows you to:
  - Set your preferred method of contact (email or SMS) for receiving temporary codes for multifactor authentication login by clicking **My Profile**.
  - Access another clinic or portal by clicking **Switch Portals**. See Access Multiple Clinics for additional information.
  - Log out of the system by clicking **Logout**.
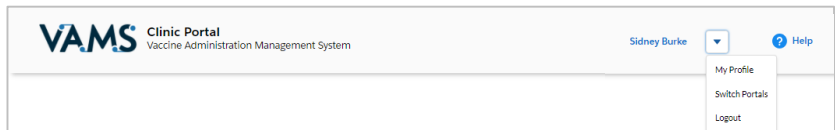
Buttons

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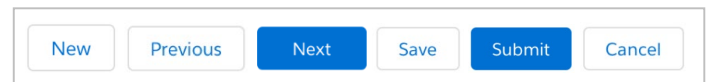
Tabs

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.

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	
☐ **Step 1: Activate Your User Account** in VAMS. Follow the prompts in your registration email from vams@cdc.gov to complete this step.	• Access to the internet • Access to your email account • Registration email from **vams@cdc.gov**	
☐ **Step 2: Register Your Clinic in VAMS** (clinic POC only). If you are your 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.	• Clinic name • Clinic type (types defined on page 4) • Primary address • Shipping address • Phone number • Clinic Facility ID • Provider PIN • Parent Org ID may also be required by your jurisdiction	**Quick Tip**: Most of this information may have already been added in VAMS by your jurisdiction POC, so you will simply be confirming it is all correct and making any necessary edits.
☐ **Step 3: Add Clinic Staff as VAMS Users** so your clinic staff receives a registration email to activate their own VAMS account.	• Familiarity with the VAMS Role and Activity Matrix on page 12 (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 process

- 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 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 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 immediately be taken to the Vaccination Clinic Registration page if you are your clinic's POC, where you will follow the instructions in Step 2: Register Your Clinic in VAMS. If you are not the clinic POC, you will be taken to your clinic's home page in VAMS.
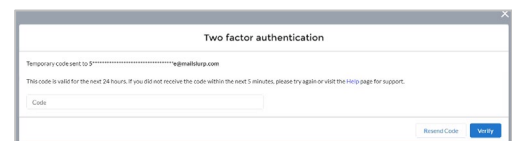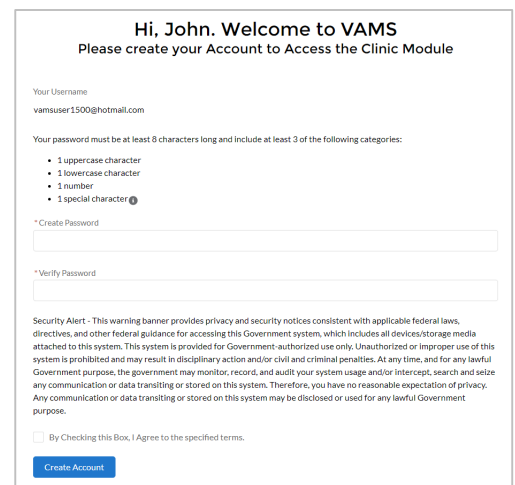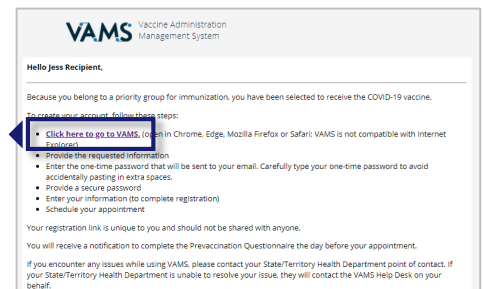
☐ Step 2: Register Your Clinic *(Clinic POC only)*

What you'll need to complete this step

- Clinic name
- Clinic type
- Primary address
- Shipping address

- Phone number
- Clinic Facility ID (required for reporting to CDC)
- Provider PIN (required to identify your clinic for ordering in VTrckS)
- Parent Organization ID (if required by your jurisdiction for HL7 integration)

Quick Tip: Most of this information may have already been added in VAMS by your jurisdiction POC, so you will simply be confirming it is all correct and making any necessary edits.

➢ 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 Organization ID may also be required by your jurisdiction.

- **Physical and Shipping Addresses**:
    - o 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.

NOTE: After registering your clinic in VAMS, it shows as "active" to your jurisdiction POC in the system. However, it is **not visible to recipients**.

❑ 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 <u>must</u> have the clinic administrator and healthcare professional roles filled to maintain clinic operations. Since the clinic administrator can manage inventory in VAMS, you are not required to fill the inventory manager role, but we recommend it.

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 on the next page** as it provides a detailed description of the access each user has based on their role(s) in VAMS.

❑ Step 3: Add Clinic Staff as VAMS Users

VAMS Role and Activity Matrix

Activity in VAMS	Clinic Administrator	Healthcare Professional	Inventory Manager *(optional)*
Serve as the clinic POC for your jurisdiction. *(Typically, the clinic administrator serves as the clinic POC.)*	✓		
Manage clinic information (e.g., shipping address).	✓		
Manage (add, edit, remove) VAMS clinic users.	✓		
Place COVID-19 vaccine inventory requests.	✓		✓
Log COVID-19 vaccine inventory when received.	✓		✓
Reduce COVID-19 vaccine inventory.	✓		✓
Monitor clinic COVID-19 vaccine inventory levels.	✓		✓
Add vaccine recipients and their information in VAMS.	✓	✓	
Document in vaccine recipient records that Prevaccination Actions have been completed.	✓	✓	
Administer and log vaccination (vaccine information, outcome, and waste if applicable).		✓	
Search for, edit, and invalidate recipient vaccination records.		✓	
Track recipients' next-dose eligibility (if applicable).	✓	✓	
Clinic Data Reports Access:			
View and export Vaccination Administration Report; requires user to have both clinic administrator (CA) and healthcare professional (HP) roles in VAMS.	✓ + HP role		✓ + CA role
View and export Inventory-Vaccine Level Report.	✓		

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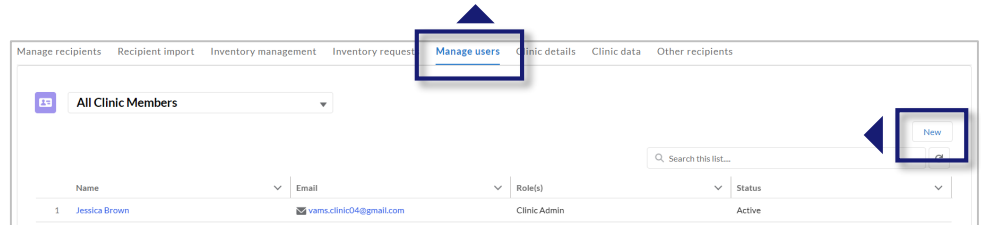
➢ In the **Add or Update User** pop-up window, enter the user's **email address,** and click **Search**.

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 <u>page 35</u>.
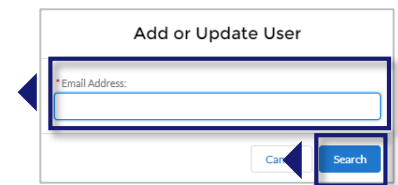
➢ In the next pop-up window, enter the user's **information** and **select the role(s)** you want them to perform in VAMS.

NOTE: Prior to adding additional roles to a user's record in VAMS, refer to the VAMS Role and Activity 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 the pencil icon to the right of the information you want to change.
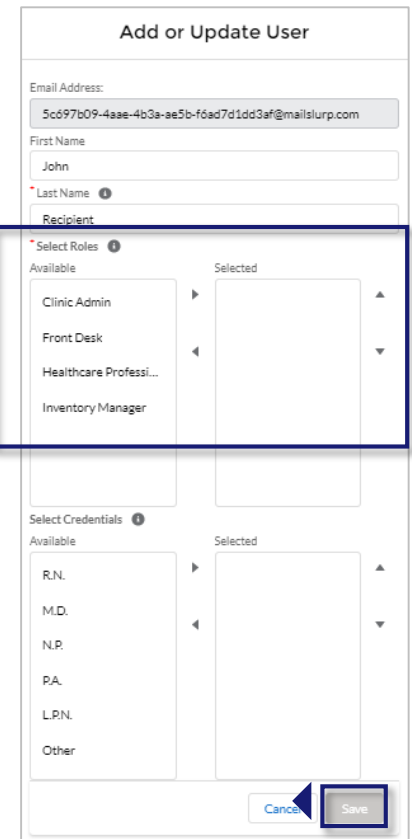
CONGRATULATIONS!

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

Section 2

Vaccine Inventory Management

Managing your clinic's COVID-19 vaccine inventory will primarily be the inventory manager's role, but as the clinic administrator, you also have access to manage it in VAMS.

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

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.
COVID-19 Vaccine Information	View information about vaccine-related packaging, labeling, and expiration dates.
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 tab to monitor inventory levels and view snapshots of available and booked appointments.

Place COVID-19 Vaccine Inventory Requests

You will place 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.**

<u>NOTE:</u> **Inventory requests** let your jurisdiction know how much inventory you need. An inventory request <u>does not</u> 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** tab in VAMS. To place an inventory request, you'll need to know your desired product type, the number of doses you want to request, and the date by which you need to receive the requested inventory.

The Inventory Requests tab 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.**

➤ Click the **Inventory Requests** tab on your clinic's home page.
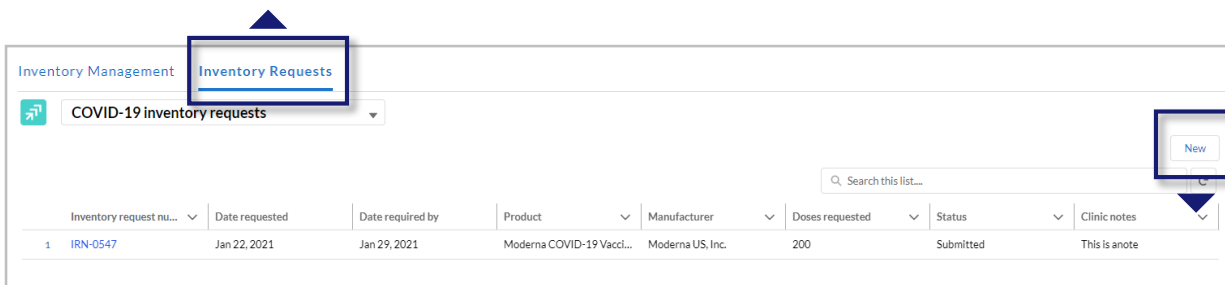
➤ Click **New** in the upper right corner of the Inventory Requests table.

• 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 **Show All Results** to be taken to the Product pop-up window.
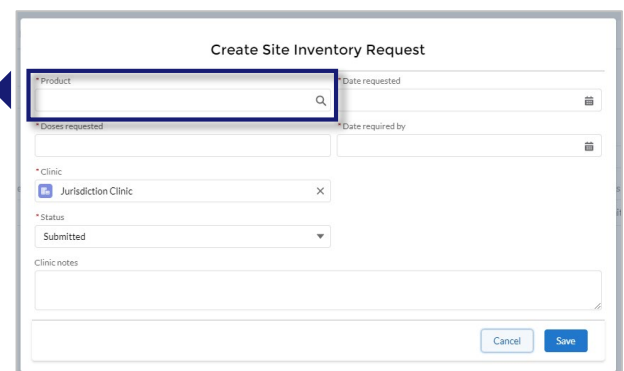
Place COVID-19 Vaccine Inventory Requests

(continued)

➢ 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.

Track COVID-19 Vaccine Inventory Requests

After your inventory request is submitted, a record of that request appears on the **Inventory Requests** tab. 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.

From the inventory request record, you can:

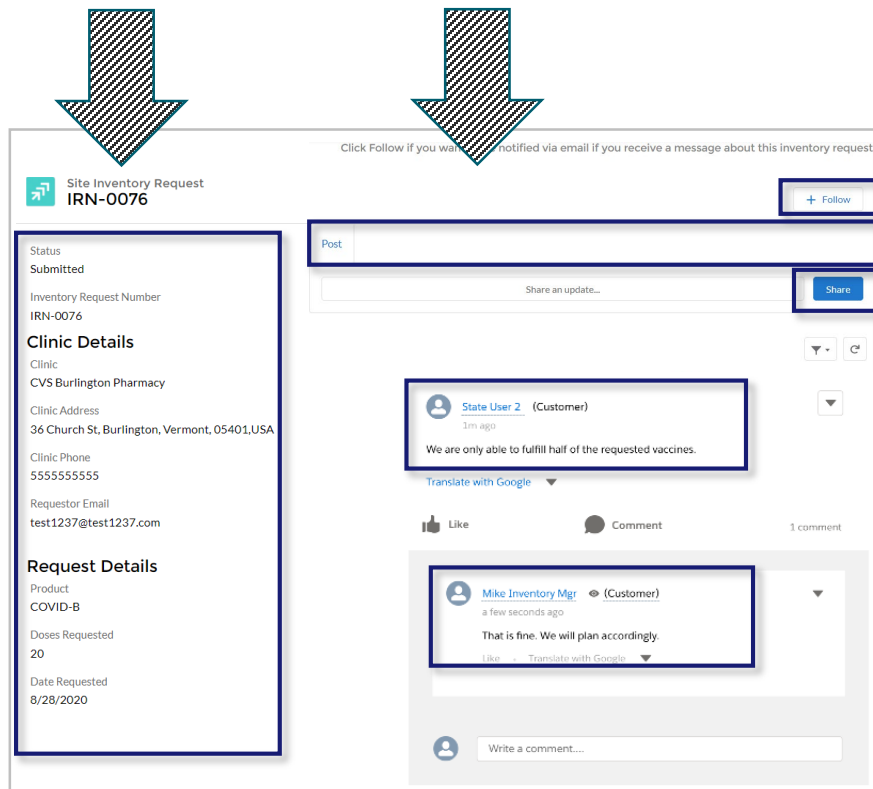| **View** Inventory Request details.	**Communicate** with the jurisdiction POC.	**Monitor** or follow comments made to your posts.
This section of the record has details about the inventory request.	Send the jurisdiction POC a message by typing in the **Post** box and clicking **Share.**	Like you would 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.
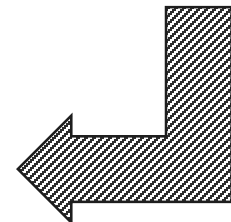
In this example…

❖ "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.

COVID-19 Vaccine Information

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**.

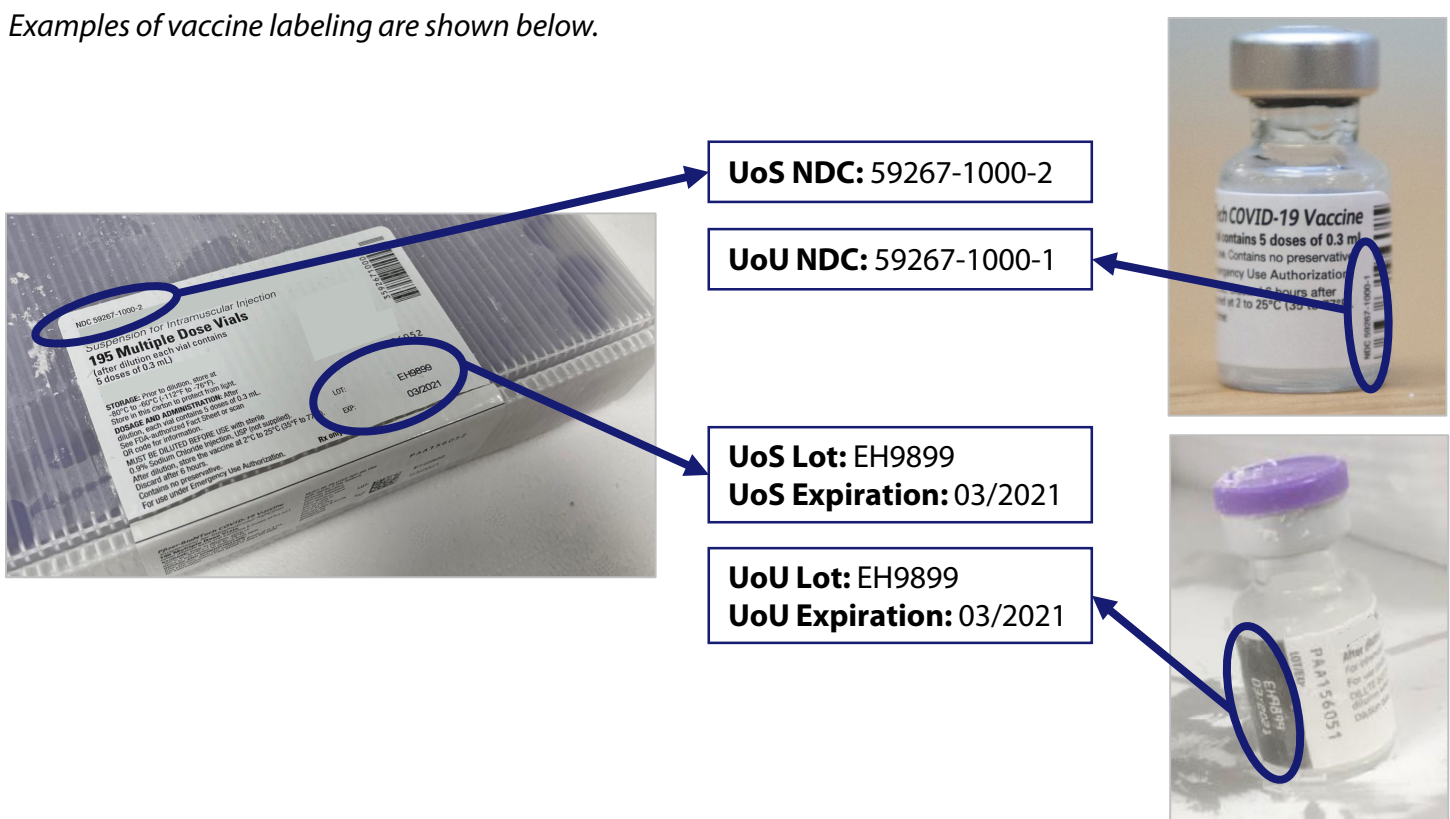## National Drug Code or NDC Numbers

- 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.

Examples of vaccine labeling are shown below.

UoS NDC: 59267-1000-2

UoU NDC: 59267-1000-1

UoS Lot: EH9899
UoS Expiration: 03/2021

UoU Lot: EH9899
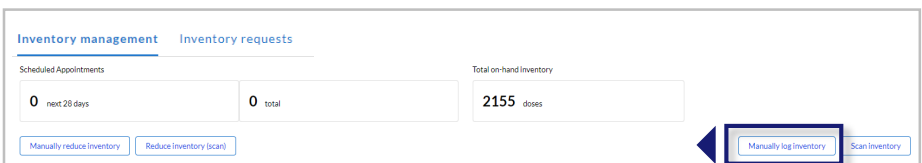**UoU Expiration:** 03/2021

👤 Log COVID-19 Vaccine Inventory

When you receive a COVID-19 vaccine delivery, you can log it in VAMS in **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.

Log Vaccine Inventory Manually

➢ On the Inventory Management tab, 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.

➤ On the Clinic Portal home page, below the doses section of the Inventory Management tab, click **Scan Inventory**.
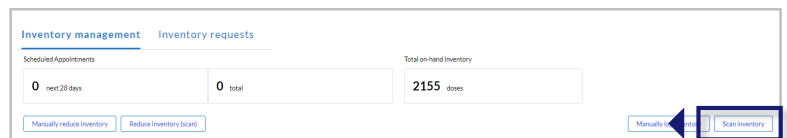
NOTE: You **must** scan each UoS **individually**. Each UoS contains multiple vials or UoUs. When logging inventory, you must scan one UoU from each UoS. See the step-by-step instructions below.

➤ 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**.
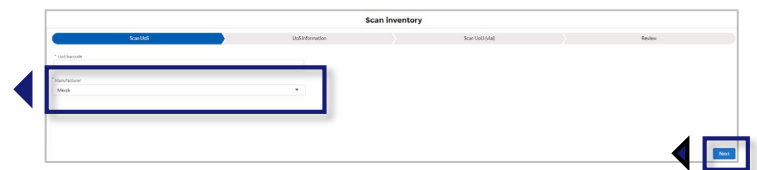
➤ The UoS Information screen will appear with prepopulated UoS information. **Enter** the Total UoU (vials) in UoS, then click **Next**.
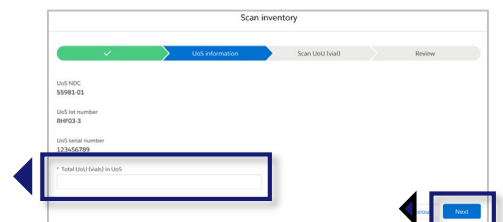
➤ **Scan** the UoU barcode on one of the vials from the UoS you are logging, and it will appear in the UoU barcode field. Click **Next**.
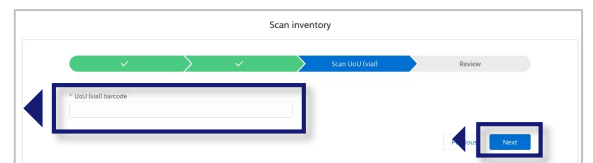
➤ **Review** and confirm the information you entered is correct, then click **Next**.

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

👤 Reduce Vaccine Inventory

Similar to how you log vaccine inventory, you can reduce vaccine inventory in VAMS in **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.

Reduce Vaccine Inventory Manually

➢ On the Inventory Management tab, below the available appointments data, click the **Manually Reduce Inventory** button.
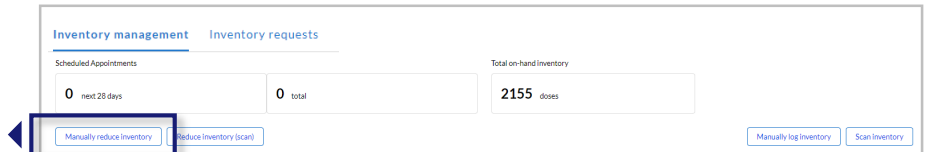
➢ In the Manually Reduce Inventory pop-up window, enter the manufacturer name, product, and UoU lot number.

➢ The expiration date will auto-populate and cannot be changed.

➢ Select a **reason for reduction**.

Quick Tip: Select "Other" as a reason for reduction when you are adjusting inventory due to an edit or invalidation of a recipient record that requires an inventory adjustment. Healthcare professionals can now edit or invalidate a recipient's vaccine record in VAMS if they made a mistake when logging vaccination. Inventory does not automatically get updated in VAMS if an edit or invalidation is saved in the system so you will need to adjust your inventory accordingly.
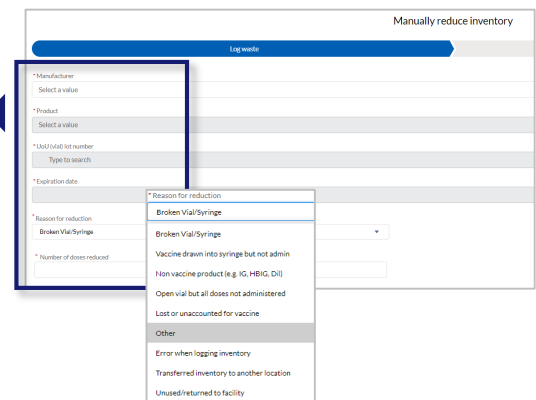
➢ Enter the **number of doses reduced**, then click **Next**.
NOTE: VAMS will not allow you to reduce more inventory than you have on hand.

➢ **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 tab, 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**.
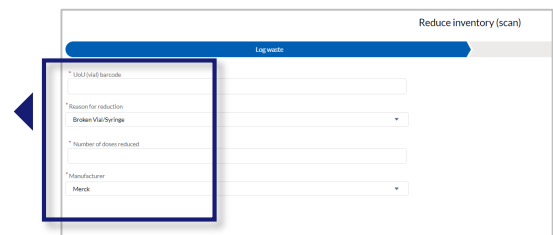
Monitor COVID-19 Vaccine Inventory Levels

Clinic administrators and inventory managers can use the Inventory Management tab to monitor inventory levels and view snapshots of available and booked appointments. This tab gives you a complete view of important information about your vaccine inventory level.

| Manage recipients | Recipient import | **Inventory management** | Inventory requests | Manage users | Clinic details | Clinic data | Other recipients |

Scheduled Appointments		Total on-hand inventory
0 next 28 days	**0** total	**5000** doses

NOTE: Third-party clinics are not available for recipients to schedule appointments. Your scheduled appointments snapshot will always show zero appointments for the next 28 days and overall because your clinic is not available for recipients to schedule appointments.

This tab gives you a snapshot of the total number of vaccine doses your clinic has in its **on-hand vaccine inventory***.

*The total on-hand inventory data on this tab 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.

NOTE: For a more detailed inventory report, as well as information on other clinic reports, see Clinic Data Reports in Section 4. In addition, as inventory managers do not have access to the Clinic Data tab, they cannot view the Inventory-Vaccine Level Report.

Section 3

Manage Recipients in VAMS

This section will show you how to add and manage recipients in VAMS.

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

Add Recipients

| 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. |

| Other Recipients | Use the Other Recipients tab to search for recipients who have already been added to another VAMS clinic. If desired, add them to your clinic to receive vaccination. |

Manage Recipients

| 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 (if applicable) | Both the clinic administrator and the healthcare professional at a third-party clinic can track next-dose eligibility. |

| Export Recipients | Export recipient data from your clinic and download the file to your device. |

| Remove Recipients | Remove recipient records from your clinic. |

Add Recipients in VAMS

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

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

- **First and Last Name**
- **External System ID** (optional). You can use this field to capture existing patient IDs, if applicable. When entered, clinic administrators and healthcare professionals can then search for recipients by their External System ID.
- **Gender**
- **Date of Birth**
- **Ethnicity**
- **Race**
- **Home Address**
- **Contact Information** (optional). A recipient's email address, home phone number, and/or cell phone number as well as their preferred method of contact can be added in VAMS. If SMS is selected as the preferred contact method, VAMS will send the recipient a verification code via SMS. You must enter this code to continue adding the recipient. You can also add contact information to an existing third-party recipient's record in VAMS. Third-party recipients who provide an email address or phone number and elect to receive communications from VAMS will receive follow-up communications from VAMS via their preferred contact method (e.g., communications about reporting adverse events and reminders for next-dose eligibility).
- **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** (optional)

Notes about adding recipients in VAMS:
- An auto-generated number called a **VAMS ID** will be created for each recipient added in VAMS. These system-generated IDs are not editable and are assigned to all existing and future recipients upon record creation. VAMS IDs are searchable on the Manage Recipients and Other Recipients tabs and will appear on recipients' vaccination certificates.
- The system will perform a **duplication check** when recipients are added to a third-party clinic, regardless of whether they are added individually or via bulk upload. The duplication check will review first and last name, date of birth (DOB), ZIP code, and External System ID (if provided) and will not allow two recipients with the same name, DOB, ZIP code, and External System ID (if provided) to be added.
- After adding recipients, you can **edit their information**, including name and home address and whether their Prevaccination 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.
- Prior to adding a recipient in VAMS, you can search on the **Other Recipients** tab to see if they have already been added by another VAMS clinic. If desired, you can then add them to your clinic to receive vaccination. More information about the search functionality on the Other Recipients tab can be found on of this user manual.

Add Recipients One at a Time, via Bulk Upload

On the Manage Recipients tab, there are two ways to add recipients in VAMS — one at a time or via bulk upload.

Add Recipients One at a Time

➢ Click the **Add Recipient** on the **Manage Recipients** tab, which is also your third-party clinic's home page in VAMS.
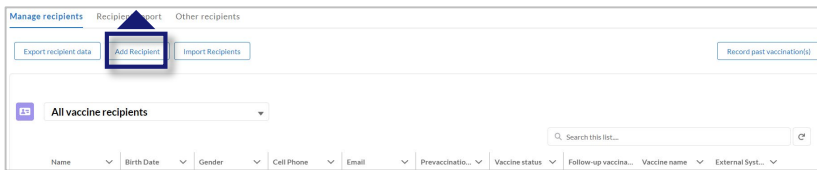
➢ Enter the **recipient's information**. Note that fields marked with a red asterisk are required. Click **Next**.

➢ Enter the **recipient's insurance information** (optional). 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.
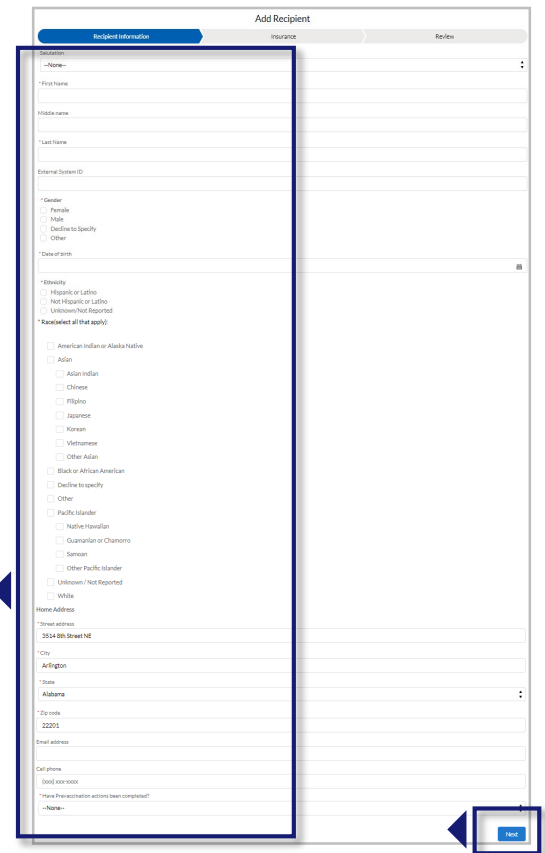
Add Recipients via Bulk Upload

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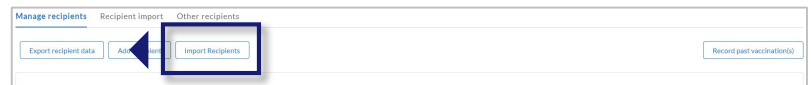
➢ Click the **Recipient Import Template** link in the pop-up window that appears. After clicking the link, the template file will download to your computer.

➢ 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 pop-up window.

➢ Click **Close**.
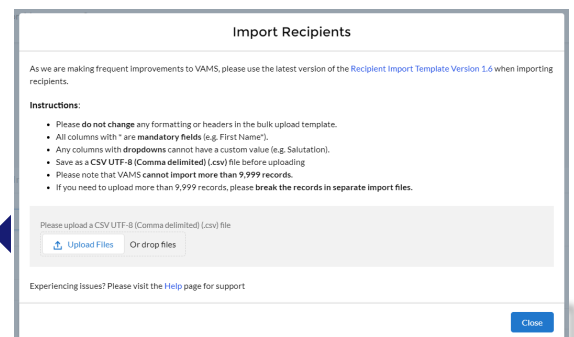
👤 **Add Recipients via Bulk Upload** *(continued)*

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 <u>must</u> 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 in VAMS.

- You <u>must</u> 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.

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.

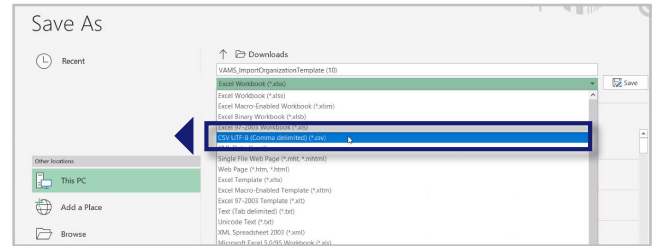- All fields within the template marked with an asterisk are required. VAMS will not upload a recipient if any of the required fields are left blank.

- Fields that contain a pick list or drop-down options **must** contain a selection.

- The recipient's DOB <u>must</u> 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."

- After inputting recipient information and saving the **Recipient Import Template** as a CSV UTF-8 file, you should close the file and immediately upload it into VAMS. <u>Do not</u> reopen the file on your computer between conversion and upload. In some cases, reopening the file after saving as a CSV UTF-8 file could alter field properties and cause the recipient upload to fail.

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 tab.

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

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

👤 **Add Recipients via Bulk Upload** *(continued)*

Confirm Bulk Upload *(continued)*

➢ Click the **Import ID** number of the recipient import to open the Import Details page.
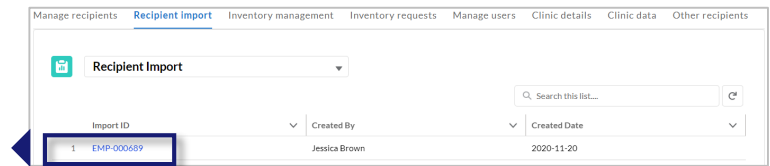
There are two main sections on the **Import Details** page:

- **Import details,** which include the import ID, who created it, and the date created.
- **Notes and Attachments** table, which includes two files: a Result Log for Bulk Upload file and the recipient import file you uploaded.
  - o The Result Log for Bulk Upload file shows the results of your file upload.
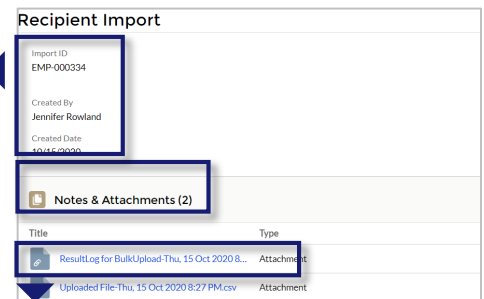
➢ Click the **Result Log for Bulk Upload** link to open the file.

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

- 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 and the message will tell you why.

NOTE: When bulk uploading recipients, VAMS will cross-check them against existing recipients who have been entered in VAMS.
- If a recipient <u>does not</u> exist in VAMS, the system will create a new record for that person on the **Manage Recipients** tab.
- If a recipient was previously removed from your third-party clinic or if a recipient already exists in VAMS, they <u>will not</u> be added to your clinic via bulk upload. To add them to your clinic, use the search feature on the **Other Recipients** tab in VAMS to search for recipients and then add them to your clinic. See <u>page 28</u> for information about the Other Recipients tab in VAMS.

Quick Tip: Once recipients have been added in VAMS, you can edit their information, including if their Prevaccination Actions have been completed from the Manage Recipients tab. Click the **name** of the recipient whose record you want to edit, then click **Edit Recipient Details** below the Recipient Details tab within the recipient's record.

Remove Recipients

You can remove recipients by clicking the **drop-down arrow** on the right side of their row in the Manage Recipients table. After clicking Remove, you must confirm you wish to remove them before VAMS will remove the recipient from your clinic.

👤 Other Recipients
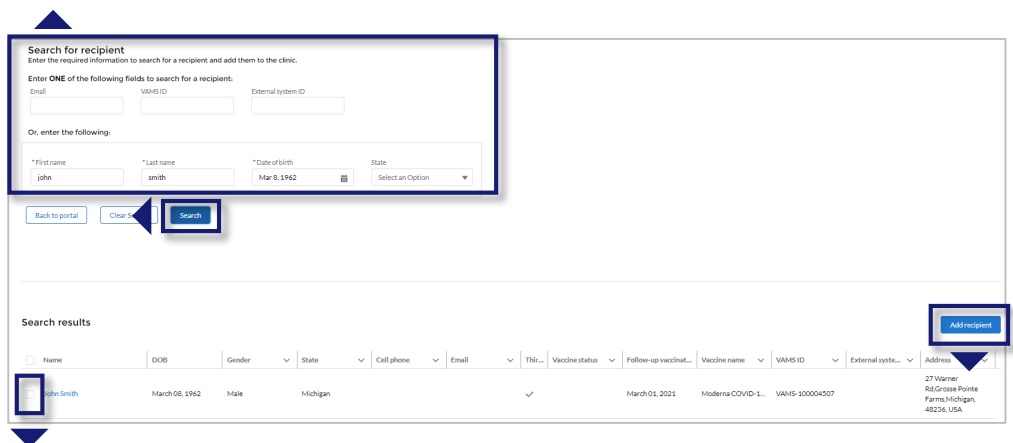
Search for Recipients Already in VAMS

Prior to adding a recipient in VAMS, you can use the search feature on the **Other Recipients** tab to see if they have already been added in the system. The search feature will search for all recipients in VAMS, including those who have registered their own accounts at standard and mobile clinics as well as those who were added by other third-party clinics. It will also search for recipients who were previously removed from your clinic. Once you find a recipient in the system, you can then add them to your clinic to receive vaccination.

NOTES:
- You <u>cannot</u> add recipients to your clinic who already have an appointment scheduled at another clinic.
- You <u>cannot</u> add recipients to your clinic who have completed their vaccination schedule.

➢ Click the **Other Recipients** tab.

➢ Click **Find a Recipient** in the top right corner of the screen.

➢ Search for the recipient's record by entering their email address, VAMS ID, or external ID, **or** by entering their first and last name and date of birth. Note in the second option, the first three fields are required as indicated by a red asterisk.

➢ Click **Search**.

- The results of your search will appear at the bottom of the page.

➢ Once you find your desired recipient, click the **checkbox** to the left of their name, then click **Add Recipient** in the top right corner of the Search Results table.
   - After adding the recipient, you will see a green alert at the top of the screen confirming you successfully added the recipient to your clinic.

➢ If you cannot find the recipient you're looking for and still want to add the recipient to your clinic, click **Back to Portal**. After returning to the Manage Recipients tab, click **Add Recipient** to add the recipient as a new recipient in VAMS.

NOTE: Recipients added to your clinic by using the search feature on the Other Recipients tab will remain on that tab and <u>will not</u> appear on the Manage Recipients tab. The Manage Recipients tab will contain recipients newly added in VAMS by your clinic staff.
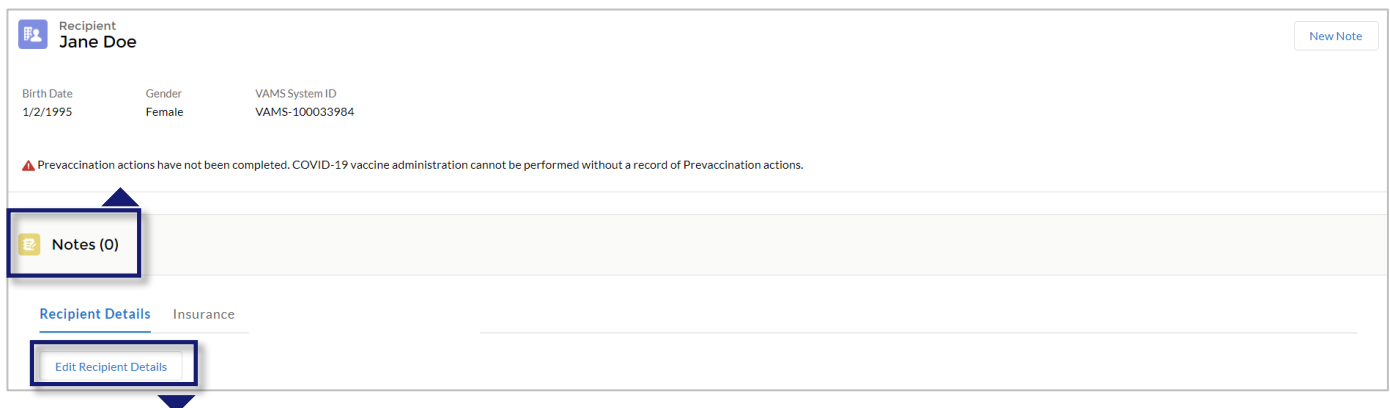
Document Completion of Prevaccination Actions

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 for Recipients and Caregivers, 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 tab, you will see an alert that indicates whether a recipient's prevaccination actions are complete.

NOTE: On the **Manage Recipients** tab, you can filter your list view of recipients by **All Vaccine Recipients** (default view), New Vaccine Recipients (those who have received zero doses), Today's Eligible Recipients, Tomorrow's Eligible Recipients, and Vaccine Protocol Completed (those who have completed their vaccination schedule). These list views include standard recipient details such as name, date of birth, gender, contact information (if provided), whether Prevaccination Actions are completed, vaccine status, and External System ID.

➢ 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.
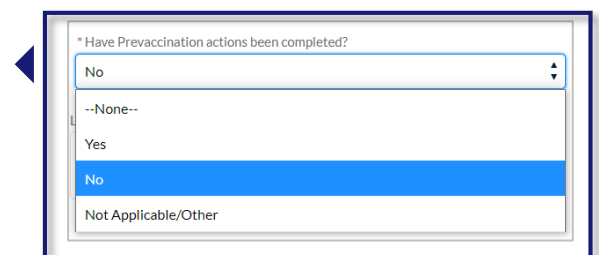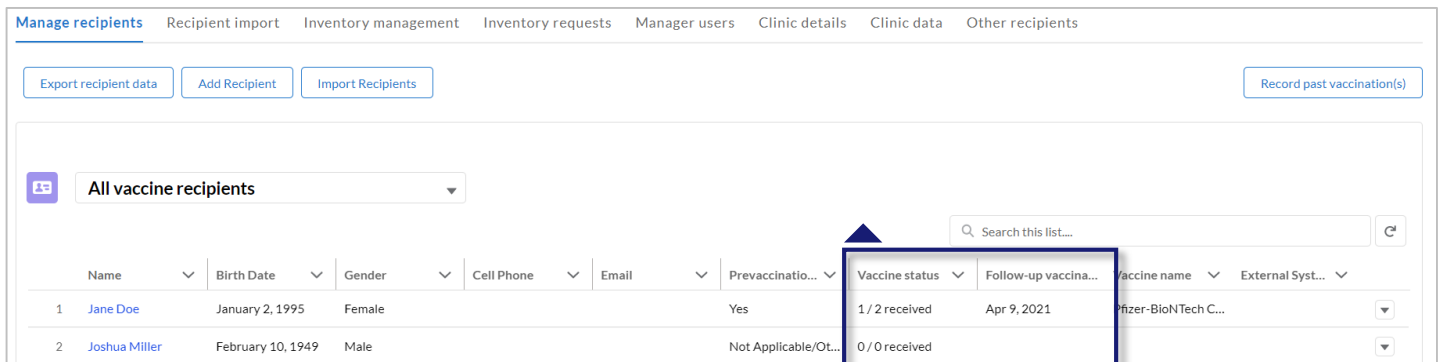
👤 **Track Next-Dose Eligibility** (if applicable)

Both the clinic administrator and the healthcare professional at a third-party clinic can track next-dose eligibility. The **Manage Recipients** tab 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** (if applicable). You can use this tab to track recipient next-dose eligibility outside the recipient record.

➢ Navigate to the **Manage Recipients** tab.

➢ Review the **recipient list**.

➢ Review the **vaccine status** column.

➢ Review the **follow-up vaccination 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.

Export Recipients

If desired, you can use VAMS to export recipient data from your third-party clinic. You can use **Export Recipient Data** on the Manage Recipients tab to export recipient data within a certain date and time range. Note that VAMS only exports recipients added to your third-party clinic during your specified date and time range. For example, if you added a recipient to your clinic on March 1, and you export recipient data from March 5 to March 15, the recipient you added on March 1 will not appear in your export file.

➢ From the **Manage Recipients** tab, click **Export Recipient Data** on the left side of the screen.

➢ Select the **start date and time** and **end date and time** for the recipients you want to export.

➢ Click **Export**.

• The export file will download to your device and can be opened as an Excel document.

• Your VAMS export file contains the following recipient information:

  • Date added to your clinic

  • Salutation (if applicable)

  • First name

  • Last name

  • Date of birth

  • Email address (if provided)

  • Phone number (if provided)

  • Dose (1st/2nd)

  • Vaccine name

  • If prevaccination actions are complete

  • Next COVID-19 vaccine eligible date

  • Recipient type (e.g., recipient or other recipient, if the recipient was added via the Other Recipients tab)

Export recipient data

Enter a data range and click "Export" to download a list of recipients added to this clinic within that timeframe. Only 5,000 records can be exported at one time. If the file does not successfully download, please revise parameters and try again.

* Start date & time

* End date & time

Cancel Export

	A	B	C	D	E	F	G	H	I	J	K	L
1	Date added	Salutation	First Name	Last Name	DOB	Email	Phone	Dose (1st / 2nd)	Vaccine Name	Pre-vaccination actions complete	Next COVID-19 vaccine eligible date	Recipient type
2	11/23/2020	Mr.	JJ	OConnor	11/3/1978			1 Dose		Yes	1/13/2021	Recipient
3	1/5/2021		Obi	Test	1/25/2002			1 Dose	Pfizer-BioNTech Covid-19 Vaccine	Yes	2/14/2021	Recipient
4	1/25/2021		Marcus	Lewis	1/21/1985	vamsuser1500@hotmail.com	1234567890	1 Dose	Pfizer-BioNTech Covid-19 Vaccine		2/11/2021	Other recipient
5	1/27/2021		abd	dee	1/14/2021			N/A		Yes		Recipient
6	2/3/2021		Marcus	Brown	2/23/1988			1 Dose	Pfizer-BioNTech Covid-19 Vaccine	Yes	2/24/2021	Recipient
7	2/5/2021		Sample	User	2/5/2007			2+ Doses	Pfizer-BioNTech Covid-19 Vaccine	Yes		Recipient
8	2/9/2021	Mr.	Osborne	Test	10/29/2001			N/A		Yes		Recipient
9	2/27/2021		test	test	2/10/1949			N/A		Not Applicable/Other		Recipient
10	3/1/2021	Ms.	Joan	Crawford	2/6/1945			N/A		Yes		Other recipient
11	3/10/2021		John	Smith	1/2/1995			N/A		Yes		Recipient
12	3/10/2021		Jane	Doe	1/2/1995			N/A		Yes		Recipient
13	3/10/2021		Manuel	Reynolds	9/25/1978	vamsuser10@hotmail.com	5555555555	1 Dose		Yes	2/1/2021	Other recipient

NOTE: You can export up to 5,000 recipient records at one time. If the export file does not successfully download to your device, please revise your export start date and time and end date and time and try again.

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 shipping address; update your clinic's identifiers including the Facility ID, Provider PIN, Parent Org ID; deactivate your clinic. |

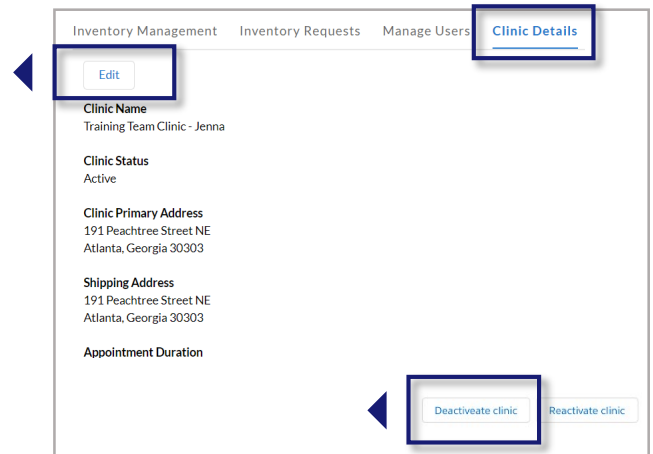| Manage Clinic Users | Edit a user record, remove a VAMS user, or add a multi-clinic user. |

| Clinic Data Reports | Reports available to view and export include: Vaccination Administration and Inventory-Vaccine Level. |

Manage Clinic Information

Access and edit information such as your clinic's shipping address; your clinic's Facility ID, Provider PIN, and Parent Org ID; deactivate or reactivate your clinic on the **Clinic Details** tab.
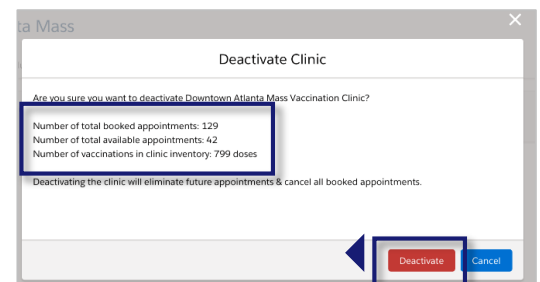
To edit any of your clinic information referenced above:

➢ Click the **Clinic Details** tab, then click the **Edit** button above your clinic's name.

➢ Click **Save** after you've made the desired updates.

| Inventory Management | Inventory Requests | Manage Users | **Clinic Details** |

Edit

Clinic Name
Training Team Clinic - Jenna

Clinic Status
Active

Clinic Primary Address
191 Peachtree Street NE
Atlanta, Georgia 30303

Shipping Address
191 Peachtree Street NE
Atlanta, Georgia 30303

Appointment Duration

Deactiveate clinic   Reactivate clinic

To 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.

➢ Click **Deactivate Clinic** 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.

ta Mass   ✕

Deactivate Clinic

Are you sure you want to deactivate Downtown Atlanta Mass Vaccination Clinic?

Number of total booked appointments: 129
Number of total available appointments: 42
Number of vaccinations in clinic inventory: 799 doses

Deactivating the clinic will eliminate future appointments & cancel all booked appointments.

Deactivate   Cancel

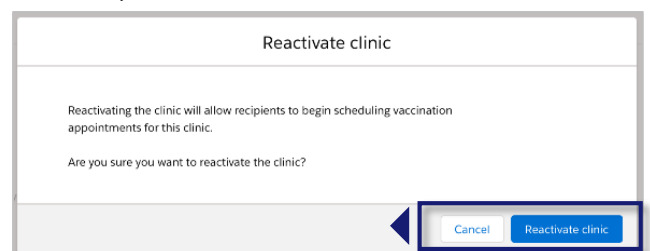**NOTE:** Deactivating a clinic in VAMS triggers the system to:
• Send an email to the jurisdiction POC informing them the clinic is deactivated.
• Deactivate all vaccine inventory requests.

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.

If you would like to **reactivate your clinic**, simply click the **Reactivate Clinic** button in the bottom left corner of the **Clinic Details** tab.

• A pop-up window will appear, confirming you want to reactivate your clinic.

➢ Click **Reactivate Clinic** or **Cancel**.

Reactivate clinic

Reactivating the clinic will allow recipients to begin scheduling vaccination appointments for this clinic.

Are you sure you want to reactivate the clinic?

Cancel   Reactivate clinic

Manage VAMS Clinic Users

On the Manage Users tab, you can edit a user record, remove a VAMS user, or add a multi-clinic user.
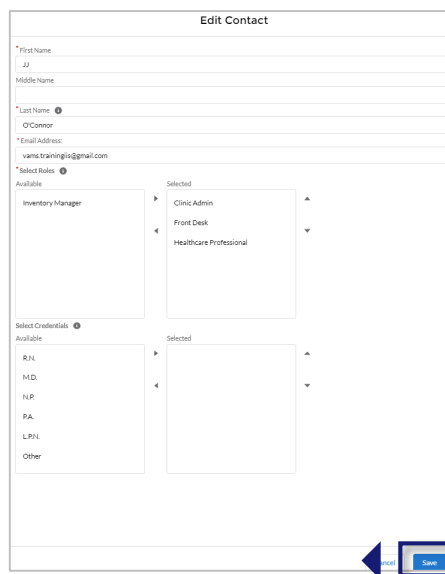
Edit or Remove a VAMS Clinic User

➢ To **edit a user's information**, click the **user's name** in the Clinic Members table.
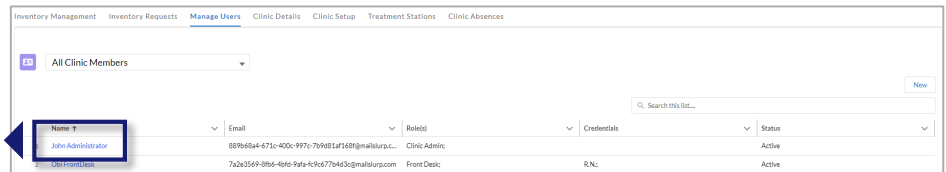
➢ On the user's information page, you can **edit** the user's details by clicking the **Edit** button in the upper right corner or **remove** the user by clicking the **Remove** button.
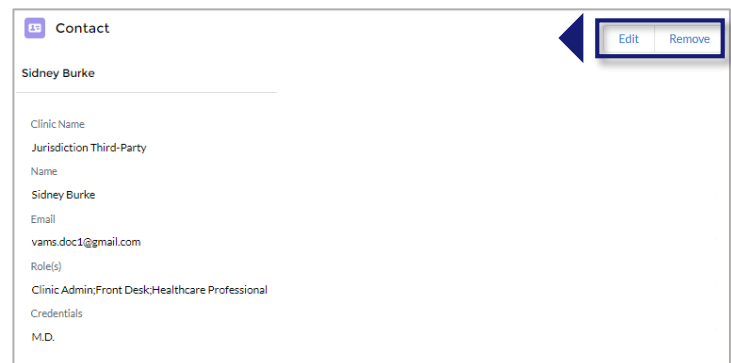
➢ If you edit the user's record, click **Save**.

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. The user will not be notified that they have been removed from your clinic.

➢ Answer **Yes** or **No** and click **Next**.
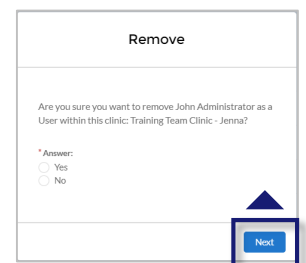
NOTE: To remove a clinic administrator role from a user's profile, you must submit a case on the **Help** page as described in Access Support in Section 5. To remove a user who has been assigned the clinic administrator role from your clinic, navigate to the **Manage Users** tab, click on their name in the **Clinic Members** table, then click **Remove** in the top right corner of the screen.

👤 Manage VAMS Clinic Users *(continued)*

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

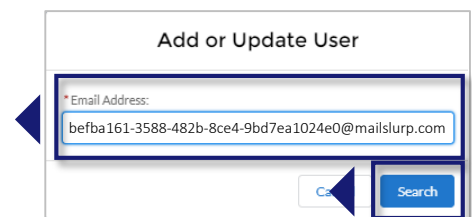You can add a user to your clinic who is already a registered VAMS user at another clinic. The system will recognize the user through their email address.
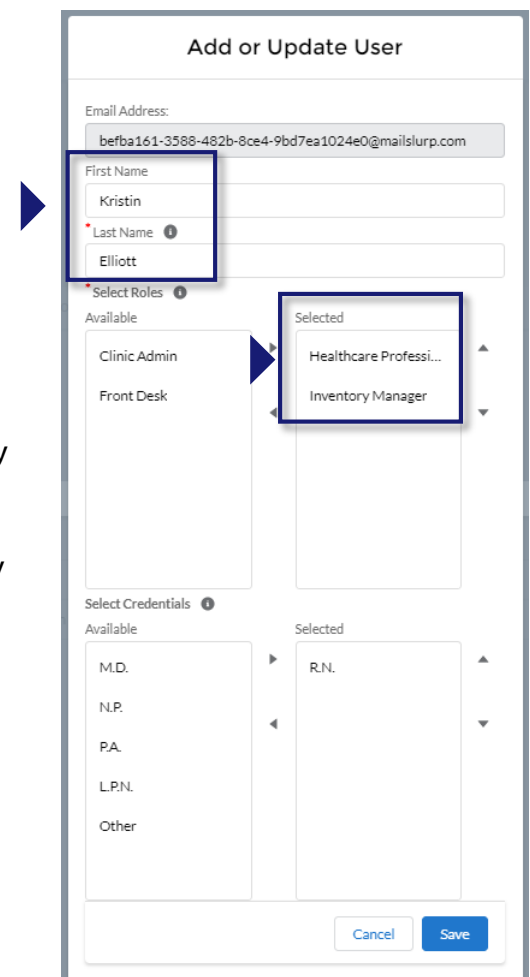
➢ In the **Add or Update User** pop-up window, enter the user's **email address** and click **Search**.

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

> **Add or Update User**
>
> * Email Address:
> befba161-3588-482b-8ce4-9bd7ea1024e0@mailslurp.com
>
> Ca...   Search

• 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.

> **Add or Update User**
>
> Email Address:
> befba161-3588-482b-8ce4-9bd7ea1024e0@mailslurp.com
>
> First Name
> Kristin
>
> * Last Name ⓘ
> Elliott
>
> * Select Roles ⓘ
> Available   Selected
> Clinic Admin   Healthcare Professi...
> Front Desk   Inventory Manager
>
> Select Credentials ⓘ
> Available   Selected
> M.D.   ▶   R.N.
> N.P.
> P.A.   ◀
> L.P.N.
> Other
>
> Cancel   Save

• 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.

Clinic Data Reports

There are two clinic data reports available to standard and mobile clinics in VAMS.

- **Inventory – Vaccine Level Report:** Includes data on your clinic's current inventory, including total doses remaining as well as doses remaining by manufacturer and product.

- **Vaccination Administration Report:** Includes a range of data on vaccines administered at your clinic, including recipient information, vaccine administration dates, administering healthcare professional information, and vaccine information.

Access to clinic data reports is dependent upon a user's assigned role(s) in VAMS. User access for each report is noted below and below each report section header.

- Clinic users with *only* the clinic administrator role assigned in VAMS can view:
    - o **Inventory – Vaccine Level Report** for today. Note the inventory manager does not have access to this report since they do not have access to the Clinic Data tab.

- Clinic users *with **both*** the clinic administrator and healthcare professional roles assigned in VAMS can view this additional report:
    - o **Vaccination Administration Report** for data on vaccines administered at your clinic today, past 7 days, and past 30 days.

Access the Reports

Access your clinic's reports from the **Clinic Data** tab. Under each report header, click the time frame to view its data and visualizations.

Vaccination Administration Report
✓ Users with **Both** Clinic Administrator and Healthcare Professional Roles Assigned in VAMS

This report includes the following **data on vaccines administered at your clinic**:

- Clinic name
- Clinic address
- Recipient name (first, middle, last)
- Recipient date of birth, gender
- Recipient mailing address (state, city, street, etc.)
- Recipient phone number, email address
- Recipient demographic information (race, etc.)
- Date of vaccine administration
- Recipient insurance information (if applicable)
- Administering healthcare professional name
- Vaccine information (CVX code, manufacturer, product, UoU, NDC, dose, lot number, and expiration date)

The Vaccination Administration Report can be **filtered** by **date administered**:
- Today
- Past 7 days
- Past 30 days

👤 **Clinic Data Reports** *(continued)*

Inventory – Vaccine Level Report
✓ Clinic Administrators

This report includes the following **data on current clinic inventory**:

- Total manufacturers
- Total doses remaining
- Doses remaining by manufacturer and product

NOTE: Inventory-Vaccine Level reports provide data on **current inventory levels only**.

Manufacturer ↑	Product	Doses Remaining
Moderna US, Inc. (1)	Moderna COVID-19 Vaccine	77
Subtotal		77
Pfizer Manufacturing Belgium NV (1)	Pfizer-BioNTech Covid-19 Vaccine	2,999
Subtotal		2,999
Sanofi-Pasteur (1)	COVID-A	130
Subtotal		130
Total (3)		3,206

Report: Site Inventory based on Clinic
Inventory - Vaccine Level Report
Inventory - Vaccine Level report for clinic

Total Records: 3
Total Doses Remaining: 3,206

Interact with Report Data

After selecting and viewing a clinic data report, you can interact with the data by **filtering**, **sorting**, and **grouping them** and **creating charts** within the different reports.

- **Filter:** Filter data by clicking the **filter icon** in the top right corner of the screen. You can filter vaccination administration and scheduled appointment reports by administration date and scheduled start date, respectively.
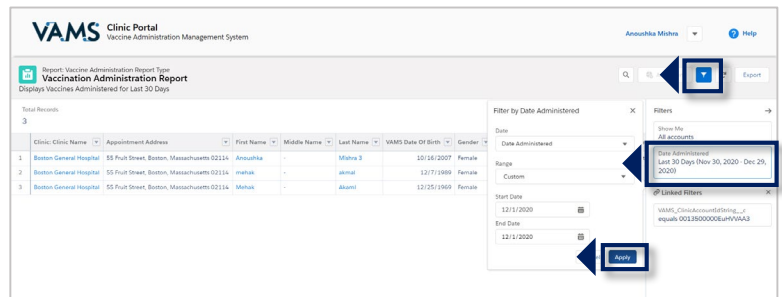
- **Sort:** Sort data by clicking the **arrow** on the right side of each column header within a report. From the drop-down menu, you can select how you want to sort the data in the report.

- **Group:** Group data by clicking the **arrow** on the right side of each column header within a report. From the drop-down menu, you can select to group the report by the data in that column by selecting "Group Rows by This Field."
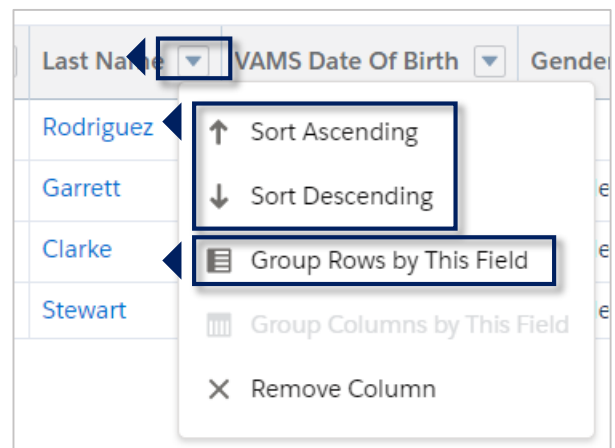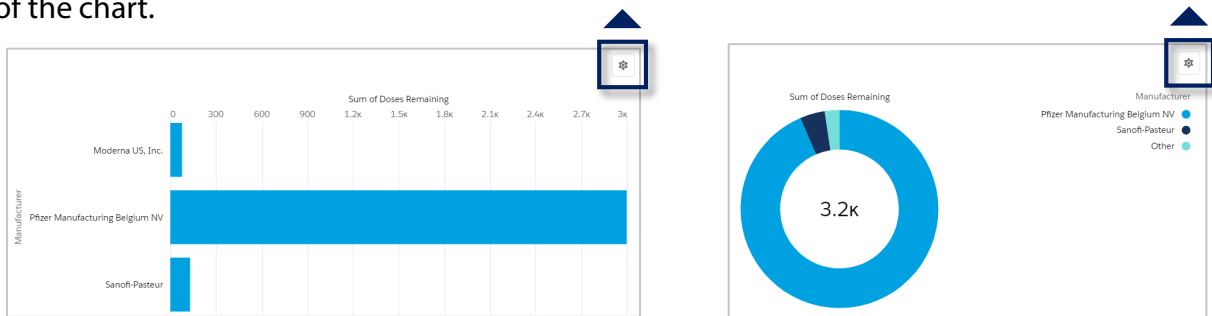
Clinic Data Reports *(continued)*

Interact with Report Data *(continued)*

- **Charts:** Create charts to represent data by first grouping the data you want to transition into a chart.

    After grouping your desired data (e.g., doses remaining by manufacturer), you can click **Add Chart** in the top right corner of the screen to create a chart.
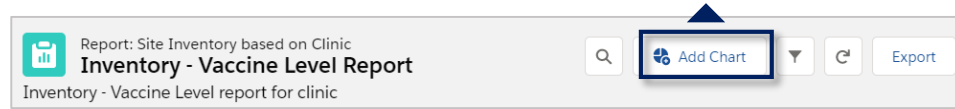
- After your chart is created, you can change the chart type by clicking the **gear icon** on the top right corner of the chart.
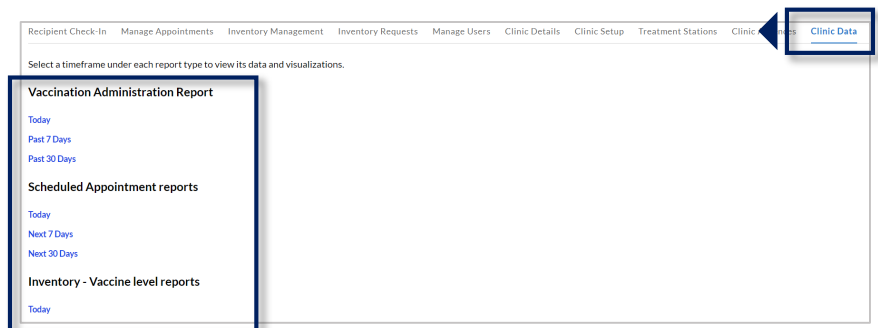
Example charts

Export Report Data

Export clinic data reports in **Formatted** or **Details Only** views.

- **Formatted** includes the report header, groupings, and filter settings and can only be exported in Excel (.xlsx) format.
- **Details Only** includes only the detail rows.

To export a report:

1. From the **Clinic Data** tab, select the **report** and **time frame** you want to view (e.g., Vaccination Administration report for the past 30 days).
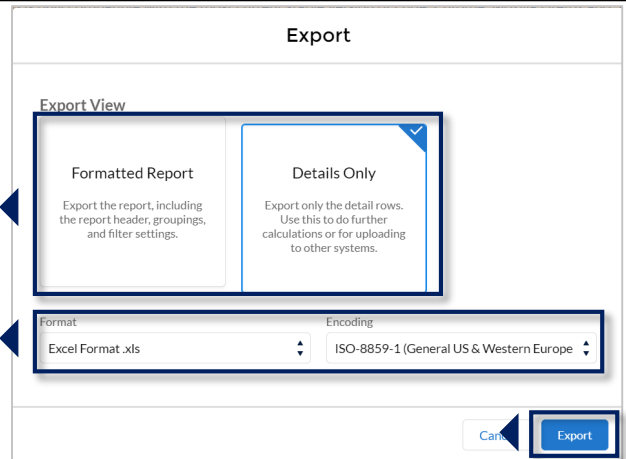
2. Click **Export** in the top right corner of the screen.

Clinic Data Reports *(continued)*

Export Report Data *(continued)*

3. Select your desired **export view** (Formatted or Details Only). If choosing a Details Only view, select the file type from the Format drop-down menu (.xls or .csv) and select from the encoding options drop-down menu.

4. Click **Export**.

Congratulations!

You have successfully exported the report and can access it as a downloaded file on your device.

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. |

| COVID-19 Vaccine Eligibility for Clinic Staff | If you or your clinic staff want to register as recipients in VAMS, follow the process outlined in this section. |

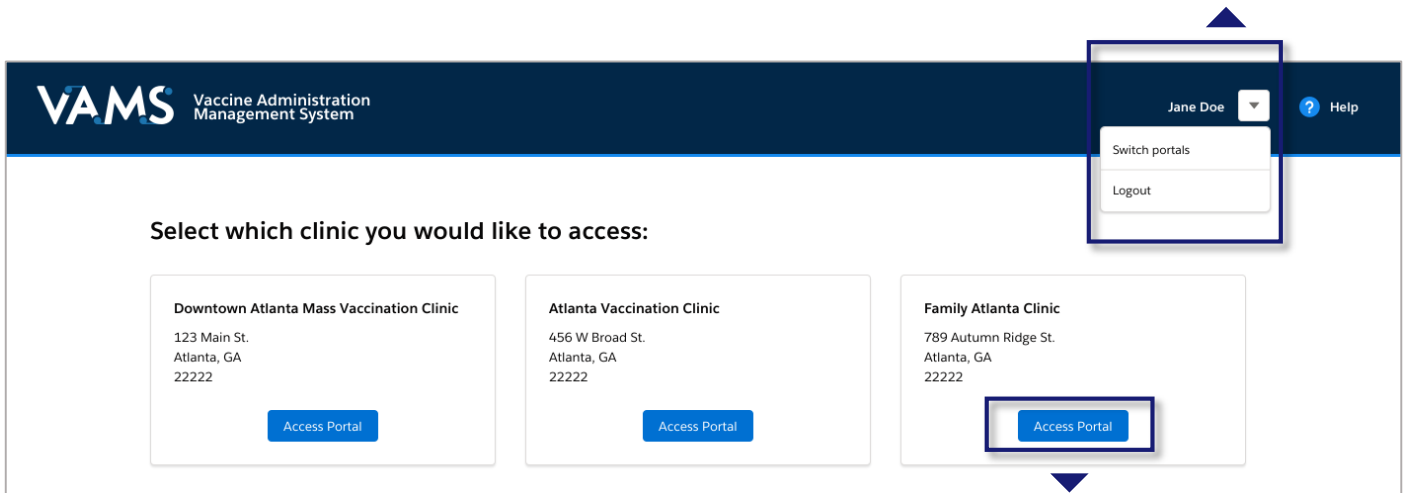| Access Support | Know how to find answers to frequently asked questions (FAQs) about VAMS and submit questions to the VAMS Help Desk. |

| VAMS Downtime Procedures | Review recommended activities leading up to and during scheduled VAMS maintenance downtime. |

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.**

  o 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.

  o 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.

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

Enable Recipient Registration in VAMS for Clinic Staff

Before you or your clinic staff can register as a COVID-19 vaccine recipient, you must contact your jurisdiction POC and request they add your clinic in VAMS as an organization. You or a delegate from your clinic will then register your clinic as an organization in VAMS. After completing registration, you or your clinic's delegate will add clinic staff as "members" of your new organization in VAMS, which will prompt a registration email to be sent to them. These steps are repeated below and instructions on how to perform each step are on the following pages.

1. **Request to be Added as an Organization**

2. **Register Your Clinic as an Organization**

3. **Add Clinic Staff as Organization Members**

4. **Clinic Staff Members Register as COVID-19 Recipients in VAMS and Become Multi-Portal Users**

1. Request to be Added as an Organization

You must request that your jurisdiction POC adds your clinic as an organization in VAMS. When adding your clinic as an organization, your jurisdiction POC will need contact information for the person you have selected as your clinic's delegate to be added as the "organization coordinator" for your clinic. As the clinic administrator, **you** can be the organization coordinator, or you can **select a delegate** from your clinic to be the coordinator.

Regardless of whether you choose a delegate or fill the role yourself, when you contact your jurisdiction POC, provide them with contact information for your clinic's new organization coordinator, including first and last name and the email address they use to log into VAMS.

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

Instructions for the organization coordinator on how to register your clinic as an organization and add clinic staff as members are on the next page.

Enable Recipient Registration in VAMS for Clinic Staff *(continued)*

2. Register Your Clinic as an Organization

Register your clinic as an organization in VAMS to get access to the Organization Portal and add clinic staff as members so they can be eligible for COVID-19 vaccination. In VAMS, an organization is any institution, association, company, or other group that identifies and adds members (individuals eligible for COVID-19 vaccine) in VAMS.

After your jurisdiction POC adds your clinic as an organization in VAMS, you will get an **email notification** from vams@cdc.gov with an **organization registration link.**

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

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

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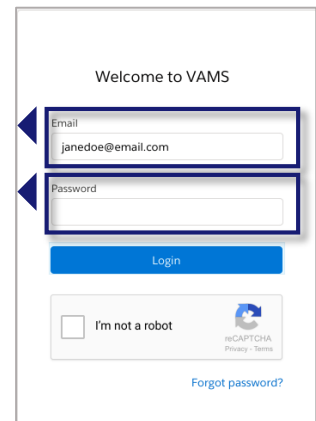
NOTE: Every time you log into VAMS, you must verify your identity by entering your password, and a number you receive via email or SMS, depending on the preferred contact method you choose (two-factor authentication process). After five log-in attempt failures, you will be locked out of the system for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

After logging in, you will see the **Portal Selection** screen where you can choose from two portals: Clinic Portal and Organization Portal.

➢ Click **Access Portal** below the Organization Portal to complete your organization registration.
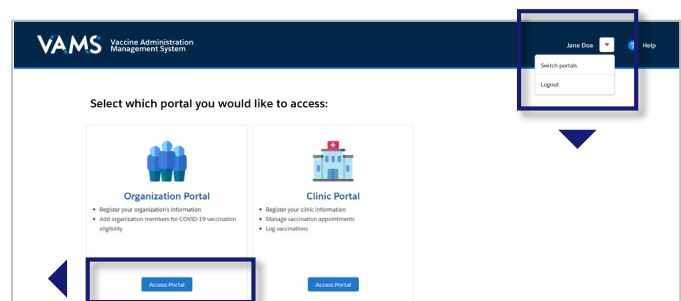
NOTE: Use the **Clinic Portal** for your role as a clinic user and the **Organization Portal** for the role as an organization coordinator for your clinic.

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**.

Enable Recipient Registration in VAMS for Clinic Staff *(continued)*

2. Register Your Clinic as an **Organization** *(continued)*

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

➢ **Verify** the information entered by the jurisdiction POC is correct and click **Next**.

➢ Enter additional **required information** on the **Organization Information** page and click **Next**.

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

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

Enable Recipient Registration in VAMS for Clinic Staff *(continued)*

3. Add Clinic Staff as Organization Members

The term organization "member" is used in VAMS to signify an individual being added in VAMS to receive a COVID-19 vaccine.

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

➢ Click the **Add Member** button on the Organization Portal home page.
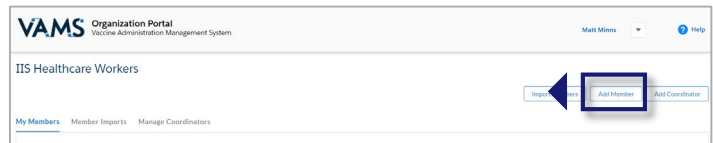
➢ Enter the member's first and last name and email address. Click **Save**.

Note the following field requirements:
- o First Name is limited to 80 characters
- o Last Name is limited to 80 characters
- o Email address must contain an "@" sign and valid domain (.com, .gov, etc.) or an error message will appear
- o If the email address you entered is already linked to another organization, you will receive an error message that states, "A member with this email address already exists."

• After adding a member in VAMS, a **registration email** will be sent to them from vams@cdc.gov with a link for them to register as a COVID-19 vaccine recipient.

NOTE:
• You can **resend member registration emails** from the My Members tab by selecting the checkbox next to the names of the members to which you want to resend the registration email, then clicking the **Resend Registration Email button** at the top right of the screen. Note that you can only resend the email once per hour, you can only resend a registration email a maximum of five times per individual, and you cannot resend a registration email to an individual who has already registered their VAMS account.

• You can **edit first name, last name, and email address** for members of your organization after uploading them to your organization in VAMS. Note that while you cannot change the information of an individual who has already registered their VAMS account, the member can edit their own first and last name during the registration process and once their account is registered; members can never change their own email addresses.

• You can **remove members** from your organization after uploading them in VAMS. Select the checkbox next to the names of the members you want to remove, then click the **Remove Registration** button at the top right of the screen. Note that you cannot remove members after they have registered and, 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.

Quick Tip: **Don't forget to add yourself as a member!** Use the same email address you use to log in as a clinic user and organization coordinator.

Follow the registration process outlined on the next page. Once registered, you will have access to three portals: Clinic, Organization, and Recipient.
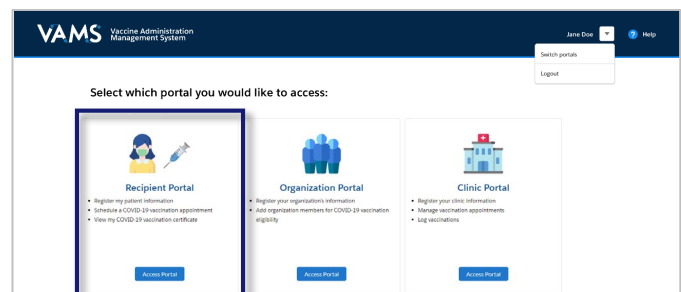
Enable Recipient Registration in VAMS for Clinic Staff *(continued)*

4. Clinic Staff Members Register as COVID-19 Recipients in VAMS and Become Multi-Portal Users

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

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

➢ Open your recipient registration **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: You must use the same email address and password to log into VAMS for every user role you hold.
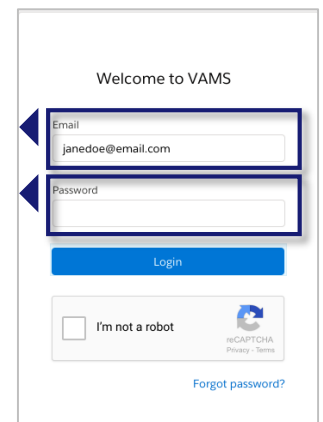
After logging in, you will be taken to the **Portal Selection** screen, where you will have multiple portals to choose from, including the Clinic Portal and Recipient Portal. **You are now officially a VAMS multi-portal user!**

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

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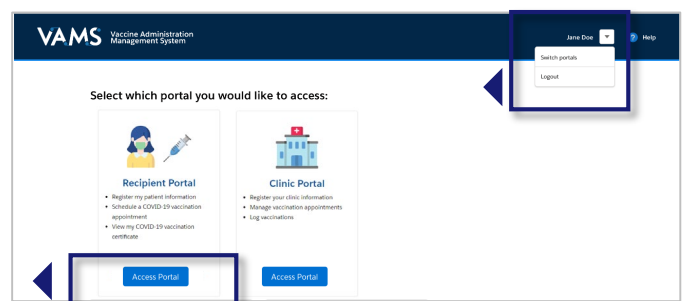
👤 Access Support

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.
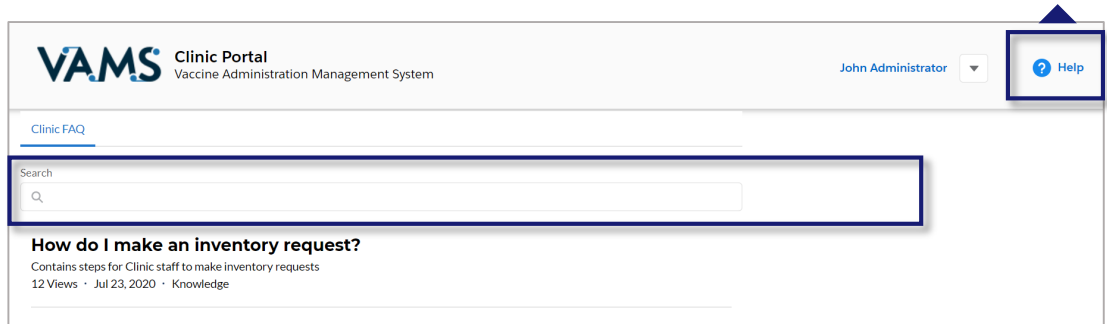

VAMS Clinic Portal
Vaccine Administration Management System

John Administrator ▾   ❓ Help

Clinic FAQ

Search
🔍

How do I make an inventory request?
Contains steps for Clinic staff to make inventory requests
12 Views · Jul 23, 2020 · Knowledge

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.

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

Help Desk

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

Toll-Free Number: +1 833-957-1100
Hours of Operation: 8:00 AM – 8:00 PM EST Monday through Friday

VAMS Downtime Procedures

VAMS is occasionally taken down for scheduled system maintenance. All VAMS functions are unavailable for all users during these scheduled downtimes. **You will be notified prior to scheduled system downtimes.**

All users should consider any processes they may need to complete prior to the downtime, such as:
- Reviewing inventory requests
- Downloading data reports
- Completing Prevaccination Actions and viewing/printing vaccination certificates

Clinics should consider these temporary processes so they can continue to administer vaccine successfully during downtimes:
- Review your upcoming appointments to see if your clinic has scheduled appointments during this time.
- Print or otherwise document the names of recipients who have appointments during this time.
- Print CDC's Prevaccination Screening Form: https://www.cdc.gov/vaccines/covid-19/downloads/pre-vaccination-screening-form.pdf.
- Print FDA's Emergency Use Authorization Fact Sheets, if necessary: https://www.cdc.gov/vaccines/covid-19/eua/index.html.
- Print CDC's Immunization Information System Data Requirement Form to document the vaccine administration information so you can add it into VAMS when the system comes back online: https://www.cdc.gov/vaccines/covid-19/reporting/downloads/IIS-data-requirement-form.pdf.
- Work with the healthcare professionals at your clinic to make a plan to enter the data from these appointments in VAMS as soon as possible.
    - Healthcare professionals can manually enter the vaccination date and time while logging any recipient's vaccination. They can also record vaccinations on behalf of another healthcare professional using the Record Past Vaccination(s) button on the Manage Recipients tab.

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.
.csv	A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values.
Emergency Use Authorization (EUA) Fact Sheet	A document produced by the vaccine manufacturer that informs vaccine recipients or their parents or legal representatives about the benefits and risks of a vaccine they are receiving.
External System ID	Optional field to capture patient IDs, if applicable, when adding recipients manually or via bulk upload. Third-party clinic administrators and healthcare professionals can search for recipients by their External System ID.
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).
National Drug Code (NDC)	A unique 10-digit or 11-digit, 3-segment number and a universal product identifier for human drugs in the United States.
Organization	Any institution, association, company, or other group that identifies and adds members (individuals eligible for COVID-19 vaccine) in VAMS.
Prevaccination Actions	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.
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.
Vaccine Information Statement (VIS)	A document that informs vaccine recipients or their parents or legal representatives about the benefits and risks of a vaccine they are receiving.
Vaccination Clinic	A clinic administering COVID-19 vaccine (sometimes referred to as a "vaccine clinic" in VAMS and this user manual).

Glossary of Terms

Term	Definition
Vaccination Schedule	A series of vaccinations, including the timing of all doses, which may be either recommended or compulsory (e.g., there are two vaccine doses that must be administered with an appropriate time interval between them for a COVID-19 vaccination schedule to be complete).
VAMS ID	An auto-generated number created for each recipient in VAMS. These system-generated IDs are not editable and are assigned to all existing and future recipients upon record creation. VAMS IDs are searchable on the Manage Recipients and Other Recipients tabs and will appear on recipients' vaccination certificates.