

Third-Party Clinic Operations in VAMS

About Third-Party Clinics

In third-party clinics, clinic users are responsible for the entire vaccination life cycle of the recipient, including adding recipients to the system, managing scheduling for recipients, and documenting their vaccine administration. This is different from VAMS standard and mobile clinics, where clinic users cannot add recipients to VAMS directly.

In VAMS, third-party clinics do NOT:

- **Show up in search results** in the Recipient Portal.
- **Include appointment scheduling functionality.** Therefore, all scheduling for third-party clinics must occur outside of VAMS. Third-party clinic recipients do not schedule appointments or self-register in VAMS.

Third-party clinics MUST establish business processes outside of VAMS for activities such as:

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

Third-party clinic user roles:

- Include the **clinic administrator, healthcare professional, and inventory manager** roles
- Do NOT include a **front desk** role because recipients in third-party clinics do not need to be “checked in” to VAMS

The activities each user performs in VAMS are listed here and are noted to the right of each section header in this document. Note that some activities can be performed by multiple roles.

Activities performed in VAMS by third-party clinic users	Clinic Administrator	Healthcare Professional	Inventory Manager (optional)
Manage clinic information (e.g., physical address)	✓		
Manage (add, edit, remove) VAMS users	✓		
Manage vaccine inventory	✓		✓
Add recipients in VAMS	✓	✓	
Document Prevacination Actions have been completed	✓	✓	
Log vaccine administration		✓	
Track recipients' next-dose eligibility	✓	✓	

To Set Up Your Third-Party Clinic, Follow the Steps Listed Below ✓ Clinic Administrator

Details on steps 2–4 are provided on the following pages.

1. Activate your account and register your clinic in VAMS (follow the prompts in your registration email from vams@cdc.gov to complete this step). **You will not be able to proceed with clinic setup if your clinic is not registered.**
2. Add clinic staff as VAMS users.
3. Place a vaccine inventory request in VAMS.
4. Add vaccine inventory in VAMS.
5. Add recipients in VAMS.

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Manage VAMS Users

✓ Clinic Administrator

Add Users

- Click the Manage Users tab.
- Click **New** in the top right corner of the Manage Users table.
- In the pop-up window, enter the user's email address and click **Search**.
- In the next pop-up window, enter the user's information and select the role(s) you want them to perform in VAMS. Click **Save**. This will trigger a registration email to the user so they can activate their account in VAMS.

Note: If the user is already registered in VAMS, they will receive an email notification stating they have been added as a user to your clinic.

Edit and Remove Users

- Click the user's name in the Clinic Members table.
- Click **Edit** in the upper right corner to edit a user's information or roles.
- Click **Remove** to remove the user from your clinic.

Key Considerations

- At a minimum, your third-party clinic must have one clinic administrator and one healthcare professional.
- You can add as many users as you want.
- Each user can be assigned multiple roles.
- Clinic administrators can perform inventory management activities, but you can also designate a separate inventory manager, if desired.
- Third-party clinics do not use the front desk role.

Manage Vaccine Inventory

✓ Clinic Administrator
✓ Inventory Manager

Place Inventory Requests

- Click the **Inventory Requests** tab.
- Click **New** in the upper right corner of the Inventory Requests table.
- Click in the **Product** field and select the vaccine product or click **Show All Results** from the drop-down menu to see more options.
- In the Vaccine Results pop-up window, click the number in the Vaccine Name column of the table to select the vaccine product you want to request.
- 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 you are assigned to.
- Enter the **date** of your inventory request.
- Enter the **date** by which you want to receive the doses you are requesting.
- Click **Save**. VAMS will send your request to your jurisdiction point of contact (POC).

Track Inventory Requests

- Click the system-generated inventory request number to open an inventory request record to monitor its status and communicate with the jurisdiction POC about the request. For detailed information on communicating with the jurisdiction POC in the inventory request record, see the Clinic Administrator User Manual.

Key Considerations

- While you will place all inventory requests in VAMS, your jurisdiction POC will place all COVID-19 vaccine orders outside of VAMS through an established process determined by the jurisdiction.
- An inventory request does not guarantee you will receive all inventory requested by the date specified in the request.

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Manage Vaccine Inventory *(continued)*

- ✓ Clinic Administrator
- ✓ Inventory Manager

To log or reduce inventory, you will enter the information on the **UoS** and **UoU**.

Log Inventory

- Click the Inventory Management tab.
- Click **Manually Log Inventory**.
- Select the **manufacturer** and **product** from the drop-down menus in the pop-up window.
- Enter the **UoS National Drug Code (NDC)** and **UoS Lot Number** shown on the packaging.
- Enter the **UoU Lot Number** listed on one of the UoUs (vials).
- Enter the **total number of UoUs** (vials) in the UoS (package).
- Enter the **expiration date** listed.
- Click **Next**.
- Review and confirm** the information you entered is correct, then click **Next**.
- Click **Finish** in the pop-up window.

Key Considerations

- Unit of use, or **UoU**, is the vaccine vial.
- Unit of sale, or **UoS**, is the packaging in which the vaccine vials are delivered.
- You **must** enter each UoS **individually**.
- Each **UoS** contains multiple vials or **UoUs**.

Reduce Inventory

- Click the Inventory Management tab.
- Click **Manually Reduce Inventory**.
- Select the **manufacturer** and **product** from the drop-down menus in the pop-up window.
- Enter the **UoU (vial) Lot Number**.
- Select **reason for reduction** from the drop-down menu.
- Enter the **number of doses** reduced.
- Click **Next**.
- Review and confirm** the information you entered is correct, then click **Next**.
- Click **Finish** in the pop-up window.

Third-Party Clinic Operations in VAMS

Add Recipients in VAMS

- ✓ Clinic Administrator
- ✓ Healthcare Professional

Clinic administrators or healthcare professionals can add potential vaccine recipients one at a time or via bulk upload. **Third-party clinics must add recipients to their clinic before administering vaccine.** Third-party clinics can only use the bulk upload feature to add recipients, **not** to upload multiple vaccinations at one time.

Add Recipients One at a Time

- Click **Add Recipient** on the Manage Recipients page.
- Enter the **recipient's information**. Click **Next**.
- Enter the recipient's insurance information (*if applicable*). Click **Next**.
- Review all information entered on the Add Recipient pages and verify everything is correct. Click **Next**.
- After clicking Next, the recipient's record is saved in VAMS.

Bulk Upload Recipients

- Click **Import Recipients** on the Manage Recipients page.
- Click the **Recipient Import Template** link in the pop-up window. 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 Microsoft Excel.
- Click **Upload Files** in the Import Recipients pop-up window and select the .csv file you want to upload. You can also drag and drop the .csv file in the Drop Files area of the page.
- Click **Close**.

Required* Information When Adding Recipients in VAMS:

- First and last name
- Gender
- Ethnicity and race
- Whether Pre vaccination Actions have been completed

Additional Information That May Be Required Depending on Jurisdiction or Clinic Policy:

- Insurance information (*if applicable*)
- Medications (*if applicable*)
- Other relevant medical information (*if applicable*)

*Required information is noted by an asterisk in VAMS and in the column titles in the Recipient Import Template.

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Add Recipients in VAMS *(continued)*

- ✓ Clinic Administrator
- ✓ Healthcare Professional

To Confirm Bulk Upload

- Click the **Recipient Import** tab.
- Click the **Import ID** number.
- Click the **Result Log for Bulk Upload** link to open the log and view the results of your import.
- The **status column** shows whether a recipient was added in the system.
 - All recipients who have a status of “**Success**” have been imported into the system.
 - Recipients whose statuses include an error message have not been imported into the system. The error message describes why the recipient was not successfully imported.

Recipient Import Template Information

- Ensure you download and use the latest version of the import template **each time** you bulk upload recipients in VAMS to take advantage of constant improvements and to avoid data issues/inconsistencies.
- The file opens on your computer as an .xlsx file, but you **must** save it as a **CSV UTF-8 (Comma delimited) (.csv)** file **after** entering all information and **before** uploading to VAMS. VAMS does not accept any other file type.
- VAMS will not upload a recipient if any of the required fields are left blank.
- You are limited to uploading a maximum of 9,999 recipients at one time.

To Add Registered Recipients or Recipients from Other Third-Party Clinics

Clinic administrators and healthcare professionals can use this VAMS functionality if you need to add a recipient to your clinic who either:

- Is already a member of a different third-party clinic or
- Has already created a recipient account in VAMS

The **Other Recipients** tab and **Find a recipient** function enable authorized users to search, view, and add recipients to their clinic:

- Click the **Other Recipients** tab.
- Click **Find a recipient**.
- Enter the **recipient’s information** (first name, last name, date of birth, and gender).
- Click **Search**.
- If found, you can select the **checkbox** to the left of the recipient’s name, then click **Add recipient**.
- Review the **pop-up window**, then click **OK** if you want to continue.
- After clicking OK, a **success message** will appear at the top of your screen confirming you have successfully added the recipient to your clinic.

Key Considerations:

- VAMS will search for all recipients, including those registered in VAMS as recipients and those added to other third-party clinics.
- You do not need to include a recipient’s email address when searching for other recipients.

Third-Party Clinic Operations in VAMS

Document Prevacination Actions Are Complete

Prevaccination Actions will vary by clinic but can include things such as screening the recipient for contraindications, providing the Emergency Use Authorization (EUA) Fact Sheet, and acquiring authorization, if required.

- Click a recipient's name in the Manage Recipients table to access their **recipient record**.
- Click **Edit Recipient Details**.
- Record that the recipient has completed their Prevaccination Actions, then click **Next** through the Insurance and Review pages.

- ✓ Clinic Administrator
- ✓ Healthcare Professional

Key Considerations:

- In third-party clinics, clinic administrators have access to recipient PHI (protected health information).

Log Vaccine

- Click a recipient's name in the Manage Recipients table to access their **recipient record**.
- Click the **Vaccine Administration** tab.
- Click **Log Vaccination**.
- Assess recipient condition, click **Next**.
- Select a **method of logging vaccine information** (at this time you must enter vaccine information manually), click **Next**, then **enter UoU (vial) information** using the drop-down menus and click **Next**.
- Select the **vaccination site** using the drop-down menu, click **Next**.
- If you are **logging vaccination events** that happened in the past, you must log the patient's first dose of vaccine received before entering the second dose of vaccine.
- The **Vaccination Date** will default to the day and time of entry, but you can backdate a vaccination event by selecting a previous date and time.
- Log **vaccination outcome**, click **Next**.
- Indicate if **any inventory was wasted** during the appointment, click **Next**.
- From the **Successful Vaccination** page, click Next.

- ✓ Healthcare Professional

Key Considerations:

- In a recipient's record, you can download a vaccination certificate and provide it to a recipient after they receive each dose.
- Vaccination events can be backdated in VAMS by selecting a Vaccination Date and Time during the "logging vaccination event" process.

Track Vaccine Recipients' Next-Dose Eligibility

- Navigate to the **Manage Recipients** page.
- Review the **recipient list**.
- Review the **COVID-19 vaccine status** column.
- Review the **Next COVID-19 eligible date** column.
- The recipient is eligible for their next dose of COVID-19 vaccine on the date in the "Next COVID-19 eligible date" column.

- ✓ Clinic Administrator
- ✓ Healthcare Professional

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.*

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