

User Manual

Healthcare Professional Third-Party Clinic

Table of Contents

Title	Page
Introduction	
• Welcome to VAMS _____	<u>2</u>
• About Third-Party Clinics in VAMS _____	<u>3</u>
• Your Role and Activities in VAMS _____	<u>4</u>
• User Manual Guidance _____	<u>5</u>
• Navigating VAMS _____	<u>6</u>
• Getting Started in VAMS - Activate Your User Account _____	<u>7</u>
Section 1 Add Recipients in VAMS _____	
• Add Recipients One At A Time _____	<u>10</u>
• Bulk Upload Recipients _____	<u>10</u>
• Other Recipients _____	<u>13</u>
• Export Recipients _____	<u>14</u>
Section 2 Vaccine Administration _____	
• Document Completion of Prevacination Actions _____	<u>16</u>
• Log Vaccination _____	<u>17</u>
• Track Vaccine Recipients' Next-Dose Eligibility _____	<u>20</u>
• Record Past Vaccinations _____	<u>21</u>
• Search for Past Vaccination Records _____	<u>22</u>
Section 3 Additional VAMS Functionality _____	
• Access Multiple Clinics in VAMS _____	<u>24</u>
• Access Support _____	<u>25</u>
• VAMS Downtime Procedures _____	<u>26</u>
Glossary of Terms _____	<u>27</u>

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

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 Users:

- 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.



Your Role and Activities in VAMS

Your role in VAMS is critical to making sure recipient vaccinations are successful.

As the healthcare professional, you or the clinic administrator will serve as the third party for vaccine recipients who cannot activate an account or record their medical history in VAMS.

As a **healthcare professional (HP)**, you will use VAMS to manage the COVID-19 vaccine administration process for recipients. In VAMS, you can review recipient information, log vaccination, and view/track dates when recipients are eligible to receive their second dose of vaccine (if applicable).

The table below illustrates the activities that only you, as the HP, can perform in VAMS and some that you share with other users.

Activity in VAMS	Healthcare Professional	Clinic Administrator	Inventory Manager (optional)
Serve as the clinic point of contact (POC) for your jurisdiction. <i>(Typically, the clinic administrator serves as the clinic POC.)</i>		✓	
Manage clinic information (e.g., shipping address).		✓	
Manage (add, edit, remove) VAMS clinic users.		✓	
Manage clinic COVID-19 vaccine inventory (place and track inventory requests; log and reduce inventory).		✓	✓
Add vaccine recipients and their information in VAMS.	✓	✓	
Document in recipient records that Prevacination Actions have been completed and edit recipient details (if necessary).	✓	✓	
Administer and log vaccination (vaccine information, outcome, and waste if applicable).	✓		
Search for, edit, or invalidate recipient vaccination records.	✓		
Track recipients' next-dose eligibility (if applicable).	✓	✓	

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 healthcare professional, please visit CDC's [COVID-19 Vaccination Reporting Data Systems](#) site to access the standard and mobile clinic user manuals.




Third-Party Clinic Healthcare Professional 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/vams-non-recipient-login).
Gray hyperlinks	Gray hyperlinks in the footer link to section dividers and to this manual’s table of contents (e.g., “Return to Table of Contents” links in the page footers).
Dark blue hyperlinks	Dark blue hyperlinks link to other pages in this manual (e.g., Step 1: Activate Your Account in VAMS).
	Buttons like the one pictured also link to other pages in this user manual.

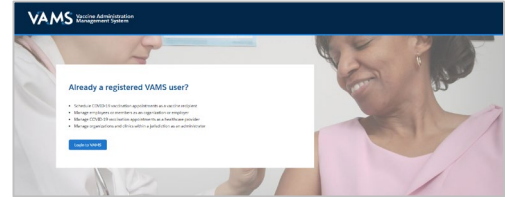
A Note About Privacy

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.

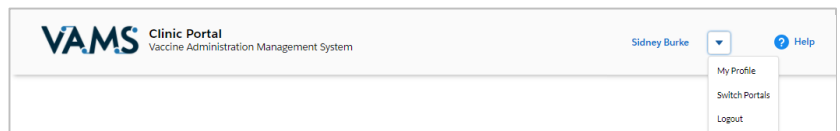
To access VAMS once registered, visit the landing page (<https://vams.cdc.gov/vaccineportal/s/vams-non-recipient-login>) and log in with your user name and password (see the next page for how to activate your VAMS account).



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

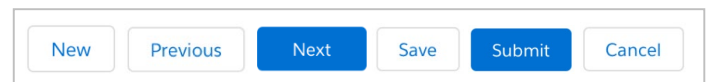
Header/Banner

- 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 multi-factor 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**.



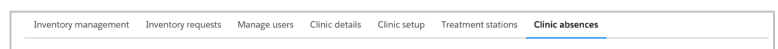
Buttons

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.

Operating hours			New	
3 items • Sorted by Name • Filtered by my accounts				
Day of week ↑	Start time ↑	End time		
1 Monday	8:00 AM	12:00 PM		
2 Monday	3:00 PM	5:00 PM		
3 Tuesday	9:00 AM	4:00 PM		

Activate Your VAMS 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 clinic administrator 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 clinic administrator.

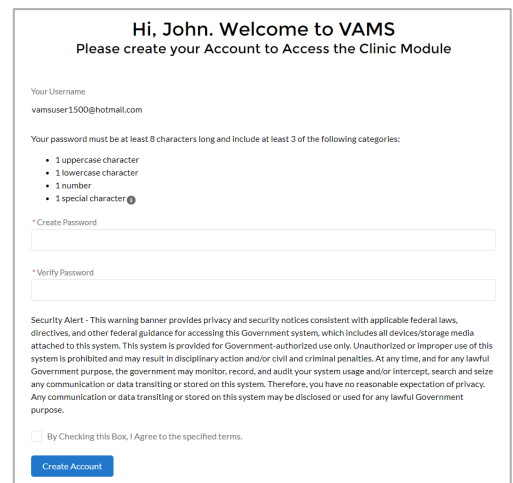
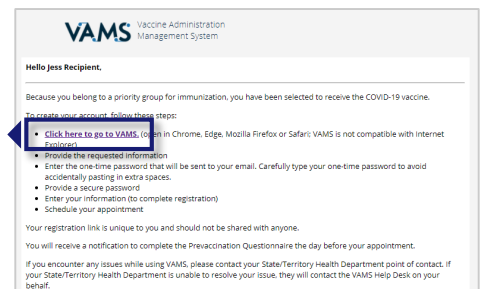
- Click the **registration link** in the email. This takes you to the account creation page in VAMS.

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.

After creating your account, you will be immediately taken to your clinic's home page, where you will see the **Manage Recipients** table.



Section 1

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.

Adding 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 search feature on the Other Recipients tab to search for recipients who have already been added in VAMS. If desired, add them to your clinic to receive vaccination.

Managing Recipients

Document Prevacination
Actions

Both the clinic administrator and the healthcare professional at a third-party clinic can document the completion of Prevacination 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:

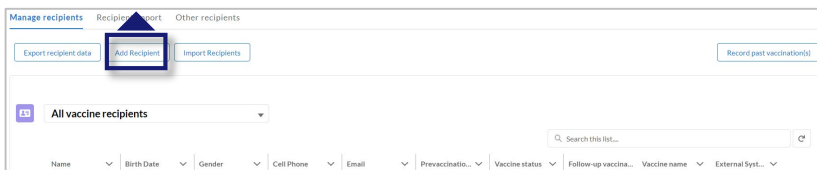
- An auto-generated number called a **VAMS ID** will be created for each recipient added in VAMS. These system-generated IDs are not editable and are assigned to all existing and future recipients upon record creation. VAMS IDs are searchable on the Manage Recipients and Other Recipients tabs and will appear on recipients' vaccination certificates.
- The system will perform a **duplication check** when recipients are added to a third-party clinic, regardless 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. to administer vaccine. More information about the search functionality on the Other Recipients tab can be found on [page 13](#) 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**.

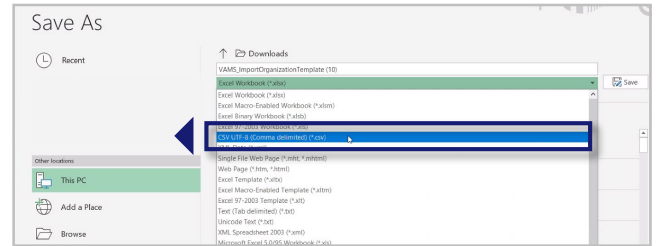


Add Recipients via Bulk Upload *(continued)*

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



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.

Confirm Bulk Upload

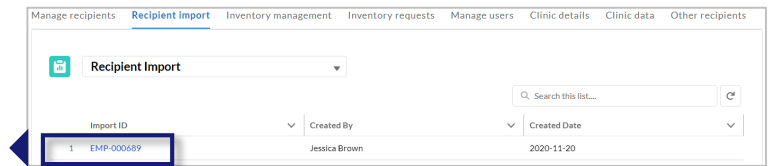
After importing a list of recipients, the following processes automatically occur in VAMS:

- 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)*

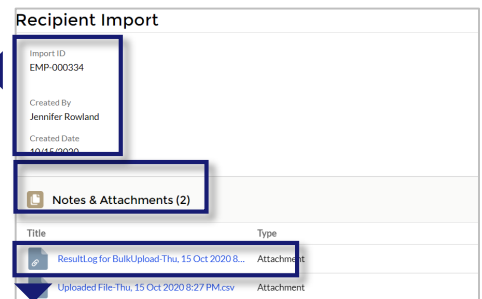
Confirm Bulk Upload *(continued)*

- 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.
 - The Result Log for Bulk Upload file shows the results of your file upload.



- Click the **Result Log for Bulk Upload** link to open the file.
- Scroll to the right until you see the **status column**. The **status column** shows whether a recipient was added in the system.

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

- All recipients who have a status of **Success** have been uploaded in the system.
- Recipients whose statuses include an error message were not uploaded in the system 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 does not 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 will not 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 [page 13](#) 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 Pre vaccination 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

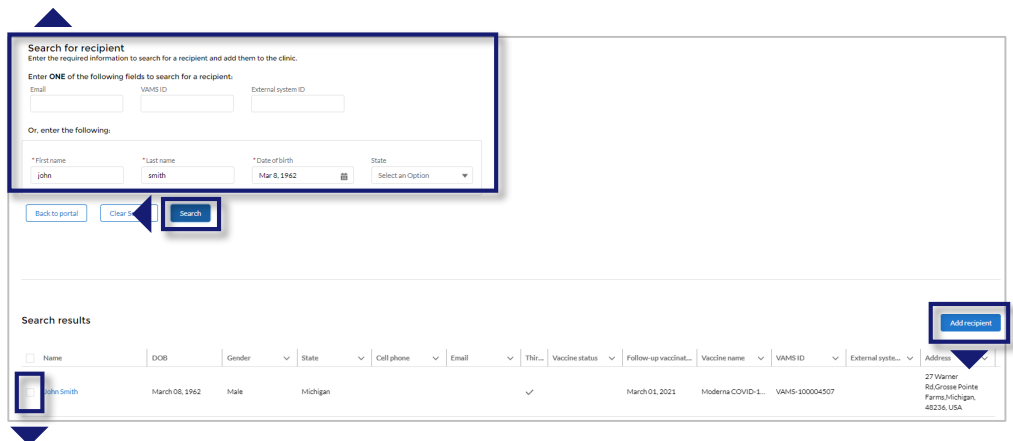
Prior to adding a recipient in VAMS, you can use the search feature on the **Other Recipients** tab to see if they have already been added in the system. The search feature will search for all recipients in VAMS, including those who have registered their own accounts at standard and mobile clinics as 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 cannot add recipients to your clinic who already have an appointment scheduled at another clinic.
- You cannot 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.



Name	DOB	Gender	State	Cell phone	Email	Thir...	Vaccine status	Follow-up vaccinat...	Vaccine name	VAMS ID	External syste...	Address
<input checked="" type="checkbox"/> John Smith	March 08, 1962	Male	Michigan					March 01, 2021	Moderna COVID-1...	VAMS-100004507		27 Warner 440 Grasse Pointe Farms, Michigan, 48236, USA

- 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 will not appear on the Manage Recipients tab. The Manage Recipients tab will contain recipients newly added in VAMS by your clinic staff.

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)

	A	B	C	D	E	F	G	H	I	J	K	L
	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
1	11/23/2020	Mr.	JJ	OConnor	11/3/1978			1 Dose		Yes	1/13/2021	Recipient
2	1/5/2021		Obi	Test	1/25/2002			1 Dose	Pfizer-BioNTech Covid-19 Vaccine	Yes	2/14/2021	Recipient
3	1/25/2021		Marcus	Lewis	1/21/1985	vamsuser1500@hotmail.com	1234567890	1 Dose	Pfizer-BioNTech Covid-19 Vaccine		2/11/2021	Other recipient
4	1/27/2021		abd	dee	1/14/2021			N/A		Yes		Recipient
5	2/3/2021		Marcus	Brown	2/23/1988			1 Dose	Pfizer-BioNTech Covid-19 Vaccine	Yes	2/24/2021	Recipient
6	2/5/2021		Sample	User	2/5/2007			2+ Doses	Pfizer-BioNTech Covid-19 Vaccine	Yes		Recipient
7	2/9/2021	Mr.	Osborne	Test	10/29/2001			N/A		Yes		Recipient
8	2/27/2021		test	test	2/10/1949			N/A		Not Applicable/Other		Recipient
9	3/1/2021	Ms.	Joan	Crawford	2/6/1945			N/A		Yes		Other recipient
10	3/10/2021		John	Smith	1/2/1995			N/A		Yes		Recipient
11	3/10/2021		Jane	Doe	1/2/1995			N/A		Yes		Recipient
12	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 2

Vaccine Administration

Below are the steps you'll follow in VAMS to **log vaccine administration**.

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

Step	Details
<input type="checkbox"/> Step 1: Document Completion of Prevacination Actions	<p>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.</p> <p>You will need:</p> <ul style="list-style-type: none"> • Recipient's name
<input type="checkbox"/> Step 2: Log Vaccination	<p>You will need:</p> <ul style="list-style-type: none"> • Vaccine manufacturer, product, and UoU (vaccine vial) information; vaccination site <p>You will perform these steps:</p> <ul style="list-style-type: none"> • 2a. Log vaccine information • 2b. Select vaccination site, date, and time • 2c. Review vaccine information
<input type="checkbox"/> Step 3: Track Next-Dose Eligibility (if applicable)	<p>You will need:</p> <ul style="list-style-type: none"> • Access to the Manage Recipients tab

Below are actions you can take to log past vaccinations on behalf of yourself or another healthcare professional or if you need to edit or invalidate a past vaccination record.

Action	Details
<p>Record Past Vaccination(s) for yourself or on behalf of another healthcare professional.</p>	<p>You will need:</p> <ul style="list-style-type: none"> • Name or email address of the healthcare professional who administered the vaccination(s) • Recipient's name • Vaccine manufacturer, product, and UoU (vaccine vial) information; vaccination site, date/time of administration
<p>Search Past Vaccinations so you can edit or invalidate past recipient vaccination records.</p>	<p>You will need:</p> <ul style="list-style-type: none"> • Recipient's name

❑ Step 1: Document Completion of Prevaccination Actions

You will need:

- Recipient's name

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.

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

- 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**.

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.

- 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.

- 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.

□ Step 2: Log Vaccination

You will need:

- Vaccine manufacturer, product, and UoU (vaccine vial) information; vaccination site

You will perform these steps:

- 2a. Log Vaccine Information
- 2b. Select Vaccination Site, Date, And Time
- 2c. Review Vaccine Information

- Click the **Vaccine Administration** tab.
- Click **Log Vaccination**.
- **Answer** if the recipient has ever received a COVID-19 vaccine.
 - If you answer **Yes**, you will enter which vaccine the recipient received and the prior vaccination date.
 - If you answer **No**, you do not need to provide additional information on this page.
- After answering the question(s) about past COVID-19 vaccinations, click **Continue**.
- On the Log Vaccination page, respond to the question shown on the screen.
- If you answer **No**, the recipient is ineligible for vaccination at this time. You will be taken to a screen that says, "Because the vaccine was not able to be administered, a reschedule prompt has been sent to the recipient's email."
 - **Select** a reason for the unsuccessful administration from the drop-down menu and click **Next**.
- If you answer **yes**, additional fields will appear for you to continue the vaccination process.

NOTE: While VAMS will notify you that a reschedule prompt has been sent to the recipient's email address, be aware that this will not apply to you or the recipient since third-party clinic recipients do not need to add email address to their record, do not have access to the Recipient Portal, and do not schedule vaccination appointments in VAMS.

□ Step 2: Log Vaccination *(continued)*

2a. Log Vaccine Information

- After confirming you can administer the vaccine, additional fields will appear for you to enter vaccine details.
- Select the **Manufacturer** from the drop-down menu.

NOTE: Based on vaccine inventory data already logged in the system, the drop-down selections for the next two fields will be dependent upon the manufacturer you selected.
- Select a **Product** from the drop-down menu.
- Select a **UoU (vial) lot number**.
- The expiration date will prepopulate and cannot be edited.

The screenshot shows a form titled "Enter vaccination details" with the following sections:

- Recipient:** Jane Doe, DOB: Mar 3, 1993.
- COVID-19 vaccine administration confirmation:** Radio buttons for "Yes" (selected) and "No".
- Vaccine details:**
 - * Manufacturer: Moderna US, Inc.
 - * Product: Moderna COVID-19 Vaccine
 - * UoU (vial) lot number: 123456
 - * Expiration date: Feb 5, 2021
- Vaccination site and date:**
 - * Site: Left Deltoid
 - * Vaccination date: Date (Mar 16, 2021) and Time (10:00 AM)
- Waste information:**
 - Was any inventory wasted during the appointment? (Yes selected)
 - Wastage was from same vial entered above
 - * Reason for wastage: Broken Vial/Syringe
 - * Number of doses wasted: 1
- Buttons:** Cancel and Log vaccine.

2b. Select Vaccination Site, Date, And Time

- Under the vaccine details drop-down menus, you can see fields to **select the vaccine administration site** (e.g., left deltoid) and fields to enter the **vaccination date** and **vaccination time**.

NOTE: 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.
- Select the **Vaccination Administration Site**.
- Select the **Vaccination Administration Date**.
- Select the **Vaccination Administration Time**.
- Indicate if any **inventory** was **wasted** during the appointment.
 - If you select **yes**, you will see additional fields to detail the inventory that was wasted (e.g., vial, reason, number of doses wasted).
 - If you select **no**, you will not see additional fields relating to wasted inventory.
- After logging wasted inventory (if necessary), click **Log Vaccine** in the bottom right of the screen.

□ Step 2: Log Vaccination *(continued)*

2c. Review Vaccine Information

- **Review the vaccination details** you entered on the previous page. If everything is correct, click **Submit** in the bottom right corner of the page.

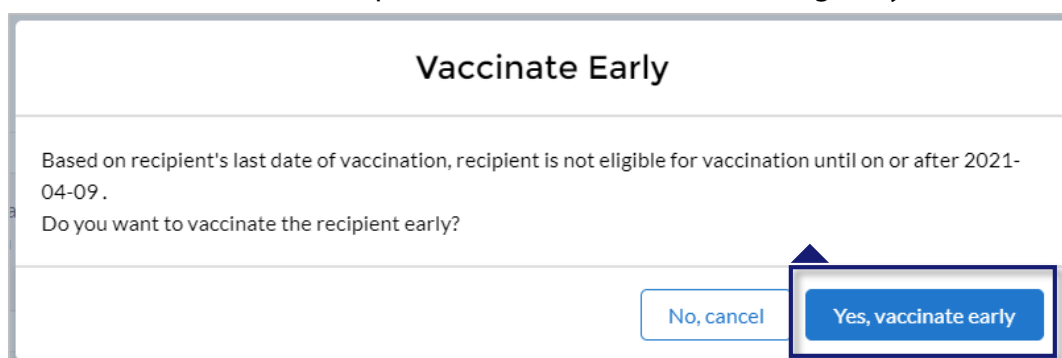
Backdating Vaccination Events

- If you are not able to log vaccine administration at the time of vaccination (e.g., due to loss of internet connectivity), you can use the vaccination date and time fields to backdate vaccinations. VAMS will identify the individual who logs the vaccine in VAMS as the same person who also administered the vaccine. If you want to log a past vaccination on behalf of another healthcare professional, the information on [page 21](#) will give you detailed instructions on to do so.
- You cannot use these fields to log future dates.

NOTE: If you are logging multiple past vaccination events for one recipient, you must log the patient's first dose of vaccine received before entering the second dose of vaccine.

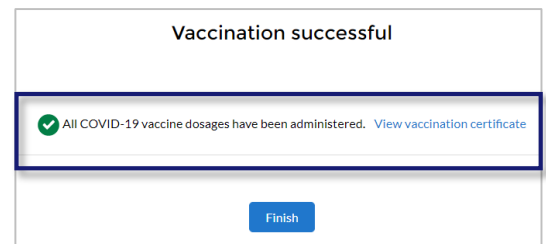
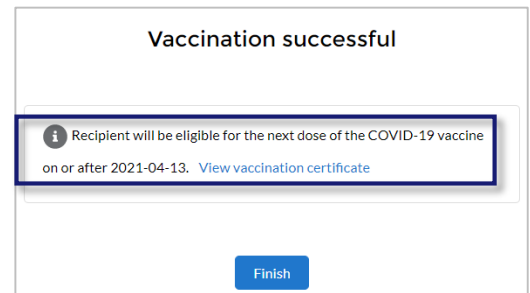
Vaccinate Early

- If necessary, you can vaccinate recipients ahead of their designated next-dose eligibility date.
- Navigate to the **Recipient Record** of the recipient you want to vaccinate.
- Click the **Vaccine Administration** tab in the recipient record.
- Click **Log Vaccination**.
- When you click Log Vaccination, a pop-up window will appear notifying you that, based on the recipient's last date of vaccination, the recipient is not yet eligible for vaccination. The window will then ask you if you want to vaccinate the recipient early.
- If you want to vaccinate the recipient ahead of their designated next-dose eligibility date, click **Yes, vaccinate early**.
 - You are then taken to the standard log vaccination page and can continue through the process as you normally would.
- If you do not want to vaccinate the recipient ahead of their next-dose eligibility date, click **No, cancel**.



□ Step 3: Track Next-Dose Eligibility (if applicable)

- After clicking **Submit** on the final screen, a new window appears notifying you when the recipient is eligible to receive their next dose of COVID-19 vaccine, if required for the vaccine product received.
- The vaccine data entered in the system determine the date the recipient is eligible to receive their next dose and will not allow the recipient to book an appointment before that date.
- If the recipient provided contact information, VAMS **sends a notification** to the recipient that includes the date they are eligible to receive their next dose along.
 - Inform the recipient of their **follow-up vaccination eligibility date**.
- You can **view the vaccination certificate** by clicking the hyperlinked text on the confirmation page (see screenshot), by accessing the recipient record, or by downloading the certificate as a PDF.
- If no further doses are required, the pop-up window states all COVID-19 vaccine doses have been administered.
 - Click **Finish** to return to the home page.



NOTE: The recipient's vaccination certificate will only reflect the dose(s) administered in VAMS.

Track Dates When Recipients Can Get Second Dose of Vaccine (if applicable)

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.

Manage recipients									
Recipient import Other recipients									
Export recipient data			Add Recipient			Import Recipients			Record past vaccination(s)
All vaccine recipients									
Search this list...									
Name	Birth Date	Gender	Cell Phone	Email	Prevaccinatio...	Vaccine status	Follow-up vaccina...	Vaccine name	External Syst...
1	Jane Doe	January 2, 1995	Female		Yes	1 / 2 received	Apr 9, 2021	Pfizer-BioNTech C...	
2	John Smith	January 2, 1995	Male		Yes	0 / 0 received			



Record Past Vaccination(s)

You will need:

- Name or email address of the healthcare professional who administered the vaccination(s)
- Recipient's name
- Vaccine manufacturer, product, and UoU (vaccine vial) information; vaccination site, date/time of administration

In addition to logging your own vaccination events, you can use VAMS to log vaccination events on behalf of other healthcare professionals at your clinic.

- On the **Manage Recipients tab**, select **Record Past Vaccination(s)** in the top right corner of the screen.
- Search for the healthcare professional who administered the vaccine by **name** or **email address**.
 - Once you start typing, relevant healthcare professionals will populate below the search bar.
 - This can be your own email address if you are recording for yourself.

- Once you've found the correct healthcare professional, select their **name/email address**, click **Search**, then click **Record vaccination(s)**.

- This brings you to the Choose Recipient and Enter Vaccination Details page.

- Search for the **Recipient's Name** who received vaccine. When the name populates in the drop-down list, **select the name**.

- The selected recipient's name and date of birth will now appear below the Recipient Name search bar.

- If you select **Yes**, you can then select the manufacturer, product, and UoU lot number from the drop-down lists.

- The expiration date will prepopulate and cannot be changed.

- Select the **vaccination site, date, and time**, then click **Done**.

- If there is no record of the recipient completing the Prevacination Actions, an error message will appear reading "Warning, Prevacination Actions have not been completed. COVID-19 vaccine administration cannot be performed without a record of Prevacination Actions." If this occurs, exit the **Vaccine Administration** page and complete the necessary Prevacination Actions before reattempting to log the vaccination.

- After advancing to the successful vaccination page, you can either return to the Manage Recipients tab by clicking **View Portal**, or record additional past vaccinations by clicking **Record Additional Vaccinations**.

Search Past Vaccination Records

You will need:

- Recipient’s email address or VAMS ID; or first and last name, and date of birth

Search for, edit, and invalidate past recipient vaccination records.

NOTES:

- This feature can be used to review recipient vaccination records for recipients added to your clinic.
- Recipients have one vaccination record for each dose received.
- You can only edit/invalidate vaccination records for doses administered at your clinic.

Search for Past Recipient Vaccination Records

- On the **Manage Recipients** tab, select the Recipient you want to review.
- Once in the **Recipient Record**, navigate to the **Vaccine Administration** tab.
- On this tab, you can view information on any vaccine(s) administered to the recipient.
- Click the **View Record** link on the right side of the **Vaccines Administered** table for a detailed view of the administered vaccine.

Edit Past Recipient Vaccination Records

- To edit the vaccination record, click **Edit Record** on the recipient’s Vaccination Record Details page.
- **Update** any information you need to edit, then select a **reason for record update** from the drop-down menu in the pop-up window and click **Save**.

Invalidate Past Recipient Vaccination Records

In addition to editing the vaccination record, you can also invalidate vaccination records that were entered in error on the **Vaccination Records Details** page.

- To invalidate a vaccination record, click **Invalidate Record** at the top of the Vaccination Record Details page.
- Select a **reason for record invalidation** from the drop-down menu, then click **Yes** to confirm you want to invalidate the record.

Section 3

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.

Access Multiple Clinics in
VAMS

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

Access Support

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

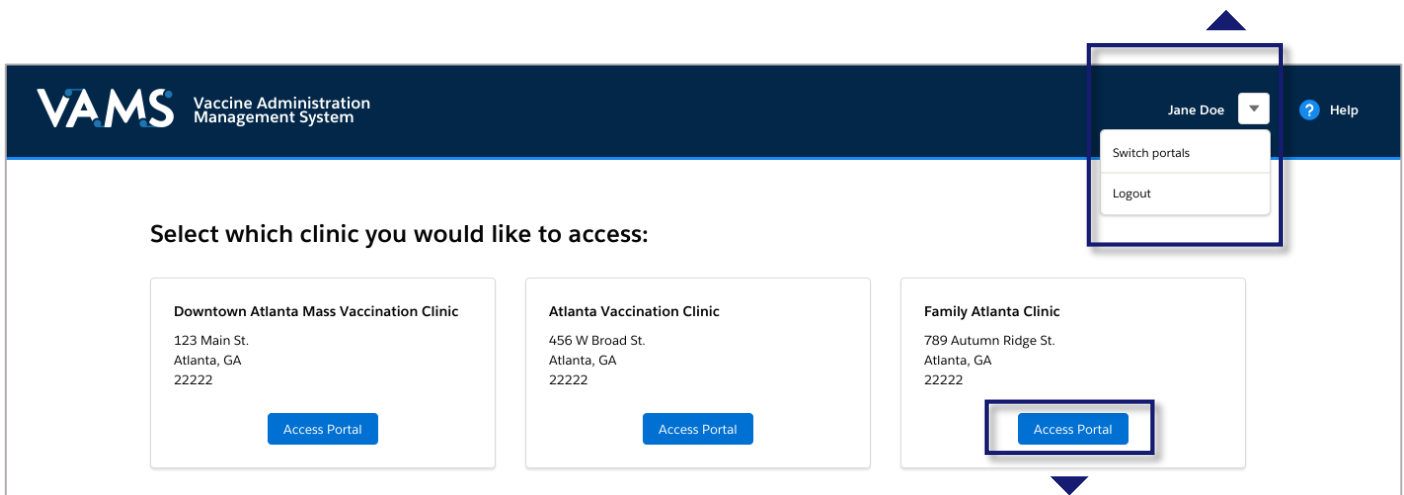
VAMS Downtime Procedures

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**.
 - If you have multi-portal access (i.e., you have access to more than one portal—Clinic Portal and Recipient Portal, for example) this will take you to the **Portal Selection** page. Click the **Clinic Portal** button, then you will see the **Clinic Selection** page shown below.
 - If you only have multi-clinic access (i.e., you have a clinic role at more than one clinic but do not have access to another portal) clicking **Switch Portals** will take you straight to the **Clinic Selection** page.



The screenshot displays the VAMS interface. At the top left is the VAMS logo and the text 'Vaccine Administration Management System'. On the top right, the user's name 'Jane Doe' is shown next to a dropdown arrow, with a 'Help' icon to its right. A dropdown menu is open, showing 'Switch portals' and 'Logout' options. Below the header, the main content area is titled 'Select which clinic you would like to access:'. It contains three cards, each representing a clinic with its name, address, and an 'Access Portal' button. The 'Family Atlanta Clinic' card is highlighted with a blue border and a blue arrow pointing to its 'Access Portal' button.

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

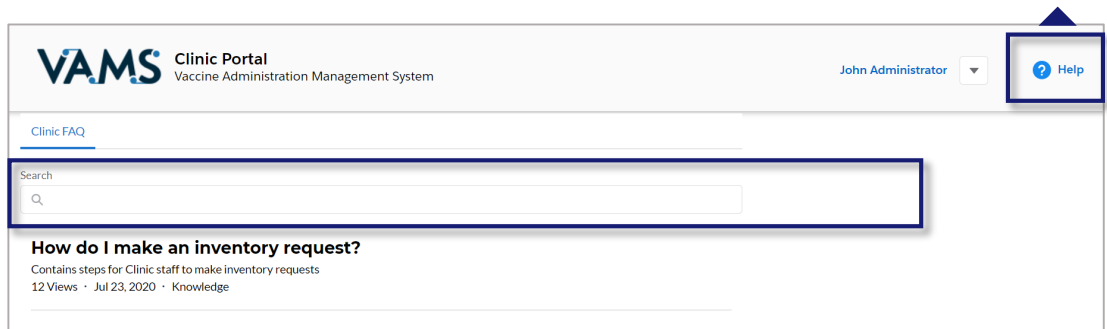
Access Support

Where to Find Additional VAMS Resources and Information

Help Page

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

- If you need help when using VAMS, click the **Help** link in the upper right corner of the navigation bar to find support.
- You can read through the list of FAQs or you can search for a particular topic in the search bar located below the FAQs tab.



Submit a Question

- If you don't find the information you're looking for, you can **submit a question**.
- From the **Help** page, click **Submit a Question**.
- Click **Submit a Case** and select **New Clinic Case**.
- When logged into the system, your name will be prepopulated in your case.
- **Select the category of your question** (and subcategory, if applicable), select your jurisdiction, type the subject of your question, then type your question in the text box.
- After clicking **Confirm**, a message will appear on the screen confirming your question was sent.
- A response to your question will be sent to you via email from **vamshelp@cdc.gov**.
- Once you receive a response to your question, you can communicate back and forth with the support team by replying to the email.

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

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
- Scheduling vaccination appointments, completing Prevacination Questionnaires, 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 Prevacination 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>.
- Make a plan to enter the data from these appointments in VAMS as soon as possible.
 - You can manually enter the vaccination date and time while logging any recipient's vaccination. You can also record vaccinations on behalf of another healthcare professional using the Record Past Vaccination(s) button on the Manage Recipients tab. You can learn more about this functionality in [Step 5: Record Past Vaccinations](#).

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 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.