

User Manual

Clinic Administrator Standard and Mobile 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.

Your Role and Activities in VAMS

Your role in VAMS is critical to your clinic's success.

As a **clinic administrator** at a standard or mobile clinic, you will use VAMS to define and manage your clinic's information (e.g., shipping address), your clinic's schedule (e.g., operating hours), your clinic's COVID-19 vaccine inventory, and add clinic staff as VAMS users.

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. If you are not your clinic's POC, you will skip Step 2: Register Your Clinic in Section 1 of this user manual.

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 17](#).

Activity in VAMS	Clinic Administrator	Inventory Manager (optional)	Front Desk	Healthcare Professional
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).	✓			
Set and manage clinic schedule.	✓			
Manage (add, edit, remove) VAMS clinic users.	✓			
Manage clinic COVID-19 vaccine inventory.	✓	✓		
Search for and/or add recipients.			✓	
Check in vaccine recipients.			✓	
Create walk-in vaccine recipient appointments.			✓	
Cancel vaccine recipient appointments.			✓	✓
Administer and log vaccination.				✓
View vaccine recipient next-dose eligibility date(s) (if applicable).				✓

NOTE: Your clinic **must** have the clinic administrator, front desk, 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: Third-party clinics operate differently than standard and mobile clinics. As such, third-party clinics have different role requirements and permissions. For information and instructions specific to the role of a third-party clinic administrator, please visit CDC's [COVID-19 Vaccination Reporting Data Systems](#) site to access the Third-Party Clinic Administrator User Manual.




Clinic Administrator User Manual

This user manual is designed for **you**.

This manual describes your role and activities (often referred to as “tasks” in this user manual) in VAMS. Detailed instructions on how to perform your tasks are included in each section. This manual also includes an overview of other VAMS user roles and responsibilities to provide context on how you will work with other users in the system.

How to Use this User Manual

Throughout this user manual, you will see the following components.

Component	Description
NOTE:	Notes are need-to-know pieces of information you should be aware of.
Quick Tip:	Quick Tips are good-to-know pieces of information and tips for getting the most out of VAMS.
➤ Arrows	Arrows indicate action items (e.g., “Click the button”).
• Bullets	Circular bullets indicate information about steps in a process that don’t require action (e.g., “A pop-up window will appear”).
Bright blue hyperlinks	Bright blue hyperlinks link to external pages (e.g., https://vams.cdc.gov/vaccineportal/s).
Gray hyperlinks	Gray hyperlinks in the footer link to section dividers and to this manual’s table of contents (e.g., “Return to Table of Contents” links in the page footers).
Dark blue hyperlinks	Dark blue hyperlinks link to other pages in this manual (e.g., Step 1: Activate Your Account in VAMS).
	Buttons like the one pictured also link to other pages in this user manual.

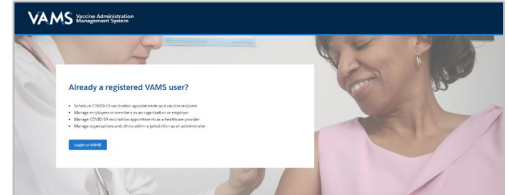
A Note About Privacy

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.

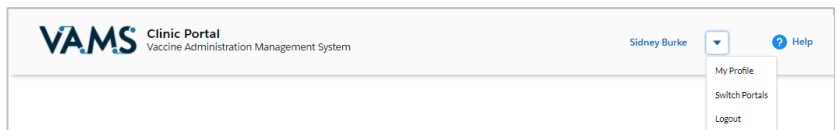
To access VAMS once registered, visit the landing page (<https://vams.cdc.gov/vaccineportal/s/vams-non-recipient-login>) and log in with your user name and password (see the next page for how to activate your VAMS account).



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

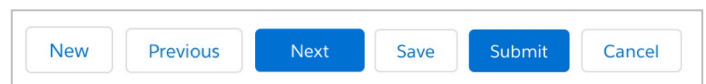
Header/Banner

- 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.



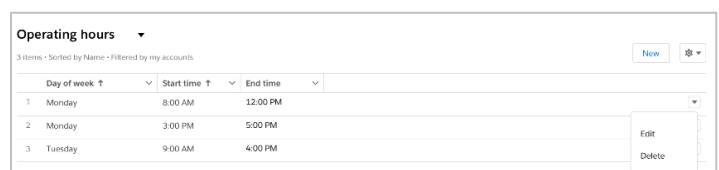
Tabs

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

Four Steps to Set Up Your Clinic in VAMS

This checklist summarizes the four 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,
- Recipients will be able to schedule appointments at your clinic,
- Your front desk staff will be able to check in recipients, and
- Your healthcare professionals will be able to log vaccine administration.

Step	What You'll Need to Complete this Step
<p><input type="checkbox"/> Step 1: Activate Your User Account in VAMS. Follow the prompts in your registration email from vams@cdc.gov to complete this step.</p>	<ul style="list-style-type: none"> • Access to the internet • Access to your email account • Registration email from vams@cdc.gov
<p><input type="checkbox"/> Step 2: Register Your Clinic in VAMS (<i>clinic POC only</i>). 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 clinic administrators at your clinic will not perform this step.</p>	<ul style="list-style-type: none"> • Clinic name • Clinic type (types defined on page 8) • Primary address • Shipping address • Phone number • Clinic Facility ID • Provider PIN • Parent Org ID (if required by your jurisdiction) <p>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.</p>
<p><input type="checkbox"/> Step 3: Set Up Your Clinic's Schedule in VAMS. This step includes selecting an appointment duration time, setting clinic operating hours, and adding treatment stations and their operating hours.</p>	<ul style="list-style-type: none"> • Desired appointment duration at your clinic (10, 15, 20, or 30 minutes) • Clinic start and end date and time zone • Clinic operating hours (days and hours your clinic will be open) • Number of vaccination stations (referred to as treatment stations in VAMS). Each treatment station represents an available appointment slot based on the selected appointment duration. <p>NOTE: You must set up at least one station to make appointments available.</p> <ul style="list-style-type: none"> • Treatment station operating hours (hours each station will be staffed on each day)
<p><input type="checkbox"/> Step 4: Add Clinic Staff as VAMS Users so your clinic staff receives a registration email to activate their own VAMS account.</p>	<ul style="list-style-type: none"> • Familiarity with the VAMS Role and Activity Matrix on page 17 • First and last name, and 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.

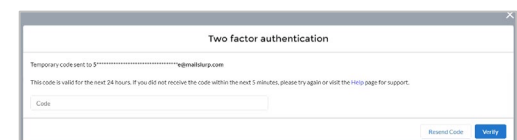
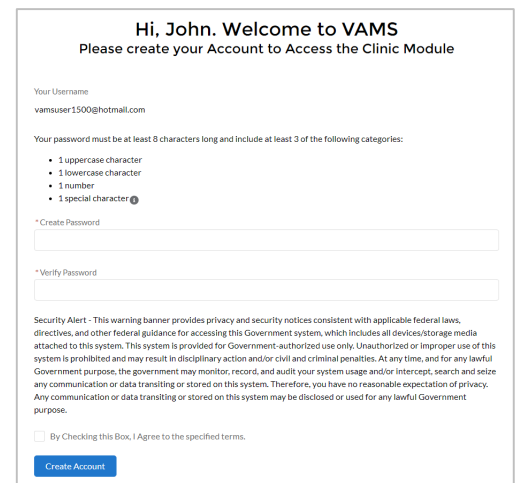
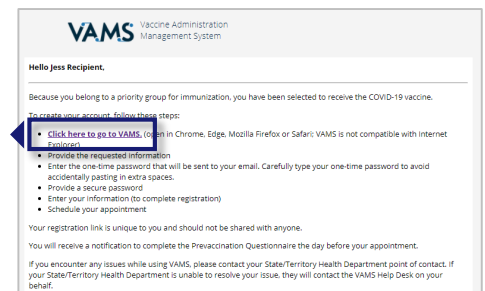
- Click the **registration link** in the email. This takes you to the account creation page in VAMS.

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.

Clinic Types in VAMS

In VAMS, clinics are categorized within three main types — standard, mobile, and third-party. Within the standard clinic type, there are 4 sub-types. 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

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

Mobile - uses all four clinic user roles, searchable by recipients in VAMS

Clinic with multiple locations for vaccination	Mobile clinic bus, mobile clinic van
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Third-party - does not use front desk clinic user role, not searchable by recipients in VAMS

Clinics responsible for both adding and managing recipient records as well as administering and tracking recipients in VAMS	Long-term care facility (LTCF), employees-only clinic within a hospital, etc.
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Other - "other" can be selected if a clinic doesn't fall within one of the categories listed above.

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

- 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:**
 - **You cannot edit your clinic's physical address after completing registration.**
 - Your clinic's shipping address can be different from the physical address if you prefer vaccine to be shipped to another location. Your clinic's shipping address **can be edited** at any time.
 - Mobile clinics must have a permanent shipping address for inventory but can change their physical address. If you work for a mobile clinic, see [Mobile Clinic Locations and Operating Hours](#) in Section 4 for more information on how to add additional locations after you've completed your mobile clinic's registration.

- 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: Set Up Your Clinic's Schedule in VAMS](#).

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** until your clinic's schedule is set up in VAMS.

□ Step 3: Set Up Your Clinic's Schedule

What you'll need to complete this step

- Desired appointment duration at your clinic (10, 15, 20, or 30 minutes)
 - Clinic start and end date and time zone
 - Clinic operating hours (hours and days your clinic will be open)
 - Number of vaccination stations (referred to as treatment stations in VAMS). Each treatment station represents an available appointment slot based on the selected appointment duration.
 - Operating hours for each treatment station (hours each station will be staffed on each day) if desired
- NOTE:** You must set up at least one station to make appointments available.

Quick Tip: Guidance on other settings in VAMS you can use to manage your clinic's availability for scheduling is provided in Section 2, [Manage Clinic Schedule](#). The steps outlined below are the minimum you must complete in VAMS for your clinic to appear in search results and be available for scheduling.

To set up your clinic's schedule, you will:

- 3a. Select an appointment duration for appointments scheduled in VAMS
- 3b. Set operating hours for your clinic
- 3c. Add treatment station(s) and set their operating hours

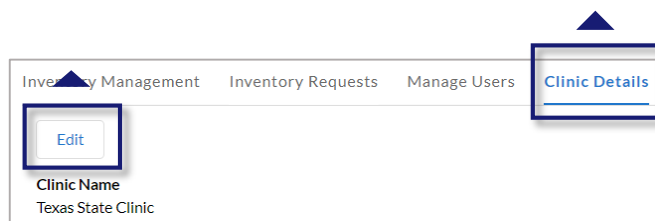
3a. Select Appointment Duration

The appointment duration selection applies to all treatment stations within your clinic and will determine how many appointment slots are available at each treatment station each day of operation. You can set the duration of appointments for your clinic in VAMS for 10, 15, 20, or 30 minutes.

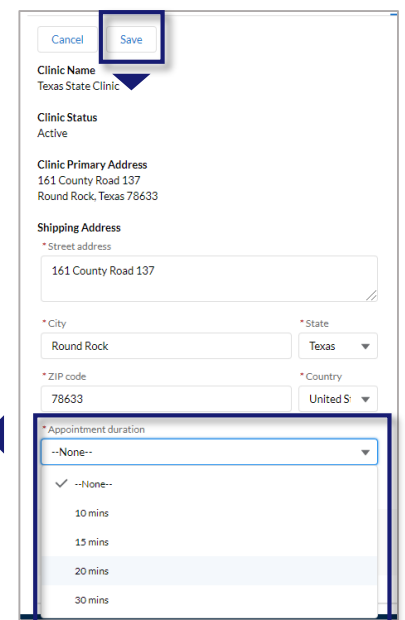
NOTE for mobile clinics: The appointment duration selected for your mobile clinic will apply to all clinic locations you add in VAMS.

Quick Tip: Your appointment duration should include time for patient intake, vaccine administration and education, and station reset for the next appointment.

- To select an appointment duration for your clinic, click the **Clinic Details** tab.
- Click the **Edit** button located at the top left of the Clinic Details tab.



- **Select an appointment duration** from the drop-down menu, then click **Save** at the top of the page. This will set the appointment duration for all treatment stations you add for your clinic in VAMS. You may edit this setting at any time.



□ Step 3: Set Up Your Clinic's Schedule *(continued)*

3b. Set Operating Hours for Your Clinic

Now that you have selected an appointment duration for your clinic, set clinic operating hours to determine when you will be open for recipient appointments. These hours, along with the appointment duration and number of treatment stations, determine how many appointments your clinic can accommodate each day.

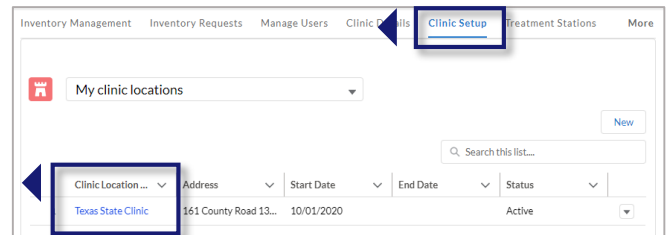
Quick Tips:

- Before you begin, plan the weekly schedule for your clinic, including which days and hours you want your clinic to be open.
- Operating hours can vary each day (e.g., hours from 8 AM–5 PM on Monday and 8 AM–12 PM on Tuesday).

NOTE for mobile clinics:

- Operating hours must be set for each clinic location you add in VAMS. [Mobile Clinic Locations and Operating Hours](#) in Section 4 provides detailed information on how to add new locations in VAMS.

- To set operating hours for your clinic, click the **Clinic Setup** tab.

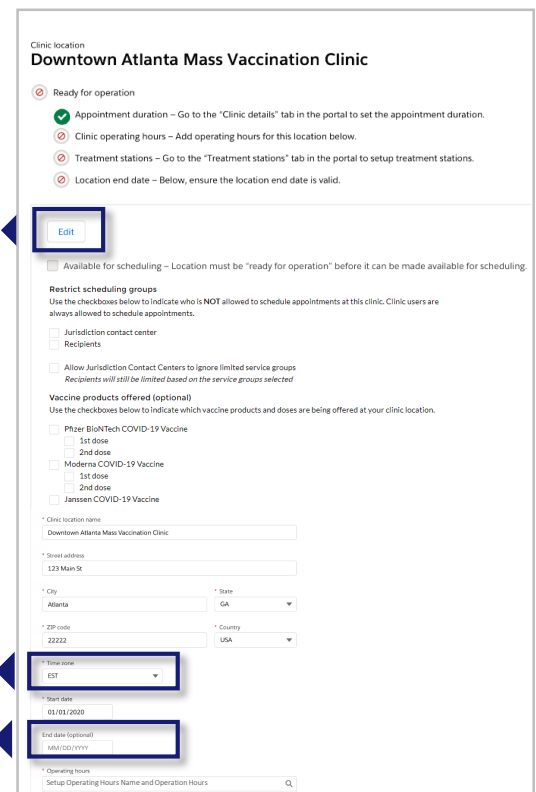


- Click your **clinic's name** in the Clinic Locations table.

The **Clinic Location** tab includes a checklist of steps that must be completed in order for your clinic to be “ready for operation” in VAMS. Once all steps are complete, the system will also show a green check mark next to “Ready for Operations,” signifying your clinic is successfully set up. Since you would have already selected an appointment duration on the Clinic Details tab, that item will have a green check next to it.

The two steps we will address on the Clinic Location page are in **bold** below.

- Appointment Duration
 - **Location End Date**
 - Treatment Stations
 - **Clinic Operating Hours**
- Click the **Edit** button below the “Ready for Operation” checklist.



Location End Date

- First, confirm the **time zone** is correct for your clinic's physical location or make any necessary changes.
- Your clinic start date will auto-populate to today's date but can be edited. **An end date** will determine how far in advance appointments can be scheduled. If you do not enter an end date, the system will default to set an end date 365 days in the future. This allows your clinic to accept recipient appointments even if you did not manually enter an end date.
- Click **Save**. If you don't see your updates reflected on the Clinic Location Details tab, **refresh the page**.
- After you've clicked Save, the text in the Operating Hours field will become a link to the **Clinic Operation Hours** page.

❑ Step 3: Set Up Your Clinic's Schedule *(continued)*

3b. Set Operating Hours for Your Clinic *(continued)*

Clinic Operating Hours

- Click the **Setup Operating Name and Operation Hours** link located under Operating Hours at the bottom of the page.

- **Name your clinic's operating hours** by clicking the **pencil icon** to the right of the Operating Hours Name field. **Type a name** for your clinic's operating hours, then click **Save**.

Quick Tip: Consider using a standard naming convention for your clinic's operating hours.

- Next, click the **Operating Hours** tab to add time slots for the hours your clinic will be open each day.
 - The time slots allow you to break your operating hours into intervals to account for down time during the day (e.g., you can set hours from 8 AM–12 PM, then again for 1 PM–5 PM to account for a shift change or lunch break).

- Click **New** in the Clinic Operating Time Slots table.

- In the pop-up window, select a **day of the week** and a **start and end time** for the time slot you are adding.

- Once you have made your selections, click **Save**.

- If you want to add another time slot for the same day or for other days, click **Save & New**. This will save your time slot and open a new pop-up window for you to add another time slot.

- **Continue this process** until all time slots are set for each day your clinic is open.

NOTE: To **edit or delete time slots in your clinic's operating hours**, click the link in the Slot # column, then click the **Edit** or **Delete** button.

□ Step 3: Set Up Your Clinic's Schedule *(continued)*

3c. Add Treatment Station(s) and Set Their Operating Hours

VAMS uses the term “treatment station” to refer to a vaccination station. The instructions listed below will use the term “treatment station” to align with what you see in VAMS.

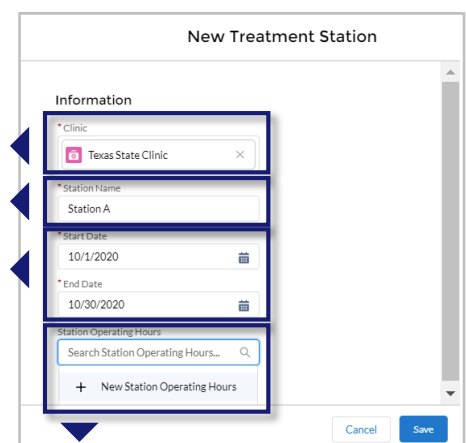
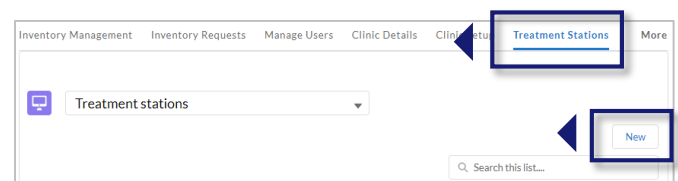
- You will **add a treatment station in VAMS for each vaccination station** in your clinic. Each treatment station represents an available appointment slot based on the selected appointment duration. No appointments will show as available to recipients until you set up at least one treatment station.
- The number of **treatment stations and their operating hours affect the number of available appointment slots each day at your clinic.** *For example:*
 - *Scenario 1:* You have **one** treatment station whose operating hours are 8 PM–5 PM on Tuesday, with an appointment duration of 20 minutes. This means a total of 24 appointment time slots will be available.
 - *Scenario 2:* You have **two** treatment stations with the same operating hours and appointment duration. This means a total of 48 appointment time slots will be available.
 - ❖ In the first scenario, if a recipient schedules an appointment for 2 PM on Tuesday, they have taken the only time slot available at 2 PM because there is only one treatment station open at that time. This means no other recipient can select the 2 PM time slot for that day.
 - ❖ In the second scenario, the 2 PM time slot on Tuesday will be available for two recipients since there are two treatment stations operating from 8 PM–5 PM that day.
- Treatment station hours will automatically default to your clinic’s operating hours unless you want a treatment station to have its own unique operating hours.

NOTE for mobile clinics: Treatment station hours will automatically default to each clinic location you add in VAMS unless you want a treatment station to have its own unique operating hours.

Add Treatment Station(s)

- To add a treatment station in VAMS, click the **Treatment Stations** tab.
- Click the **New** button.
- In the New Treatment Station pop-up window that appears, **select** your clinic’s name in the Clinic field.
- **Name** the treatment station you are adding.

Quick Tip: Consider giving each treatment station a name that aligns with how they are marked in your clinic or how they will be referenced by healthcare professionals (e.g., Station A or Station 1).
- Select the **start** and **end dates** (i.e., the dates you want this station to be available for recipient appointments) for your treatment station.
- Select **New Station Operating Hours** in the Station Operating Hours field.



□ Step 3: Set Up Your Clinic's Schedule *(continued)*

3c. Add Treatment Station(s) and Set Their Operating Hours *(continued)*

- **Name** the operating hours for this treatment station in a way that makes it easy to differentiate from other hours (e.g., "Station 1 Monday Hours" or "default to clinic operating hours") and click **Save**.

Quick Tip: Consider using a standard naming convention for your stations' operating hours (e.g., Station 1 Monday Hours).

- Once you've entered the required information for your treatment station, click **Save** and you will be taken to that **treatment station's Details page**.

NOTE: You can add as many treatment stations in VAMS as you need. You can edit a treatment station's name, start and end date, or delete a treatment station from the **Treatment Stations** tab. Making edits to or deleting your clinic's treatment stations will impact recipient appointments scheduled during those treatment stations' operating hours.

Set Treatment Station Operating Hours

Quick Tip: If you want your treatment station hours to default to your clinic operating hours, skip this step and repeat the previous steps for each additional treatment station.

To set unique operating hours for a treatment station, follow the same process you used to set your clinic's operating hours.

- From the treatment station's Details page, click the name of the operating hours for the treatment station.

- Click the **Station Operating Hours** tab.
- On the **Station Operating Hours** page, in the Treatment Stations table, click **New**.

- In the New Station Operating Time Slots pop-up window, select the **day of the week** and a **start and end time** for the time slot you are adding, keeping it within clinic operating hours.

- If you want to add another time slot for the same day or for other days, click **Save & New**. This will save your time slot and open a new pop-up window for you to add another time slot. Otherwise, click **Save**.

NOTE: You can **rename treatment station hours**, or **edit or delete a time slot in a treatment station's operating hours**, from the Station Operating Hours page. Deleting or editing operating hours will impact the number of time slots available for recipients who want to schedule an appointment at your clinic.

□ Step 3: Set Up Your Clinic's Schedule *(continued)*

Once you have completed steps 3a–3c, your final step will be to check the **"Available for Scheduling"** checkbox on the **Clinic Location** page.

As a reminder, the **"Available for Scheduling"** checkbox must be checked if you are ready to start allowing appointments to be scheduled at your clinic; however, note that it cannot be checked until all "Ready for Operation" tasks have been completed.

- To access the Clinic Location page, click the **Clinic Setup** tab.
- Click your **clinic's name** in the Clinic Locations table.

- Note the green check mark next to "Ready for Operations," signifying your clinic has been successfully set up.

- Click the **Edit** button below the "Ready for Operation" checklist.
- Click the **"Available for Scheduling"** checkbox.
- Click **Save**.

Clinic location
Downtown Atlanta Mass Vaccination Clinic

Ready for operation

- Appointment duration – Go to the "Clinic details" tab in the portal to set the appointment duration.
- Clinic operating hours – Add operating hours for this location below.
- Treatment stations – Go to the "Treatment stations" tab in the portal to setup treatment stations.
- Location end date – Below, ensure the location end date is valid.

Edit

Available for scheduling – Location must be "ready for operation" before it can be made available for scheduling.

Restrict scheduling groups
Use the checkboxes below to indicate who is NOT allowed to schedule appointments at this clinic. Clinic users are always allowed to schedule appointments.

Jurisdiction contact center
 Recipients

Allow Jurisdiction Contact Centers to ignore limited service groups
Recipients will still be limited based on the service groups selected

Vaccine products offered (optional)
Use the checkboxes below to indicate which vaccine products and doses are being offered at your clinic location.

Pfizer BioNTech COVID-19 Vaccine
 1st dose
 2nd dose

Moderna COVID-19 Vaccine
 1st dose
 2nd dose

Janssen COVID-19 Vaccine

* Clinic location name

* Street address

* City * State

* ZIP code * Country

* Time zone

* Start date

End date (optional)

* Operating hours

□ Step 4: Add Clinic Staff as VAMS Users

What you'll need to complete this step

- Familiarity with the VAMS Role and Activity Matrix on the next page. Roles in VAMS include clinic administrator, healthcare professional, front desk, and inventory manager.
- First and last name and email address for each user you plan to add

NOTE: Your clinic **must** have the clinic administrator, front desk, and healthcare professional roles filled to maintain clinic operations in VAMS. 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 gives them access to perform their role in the system.

As shown in a condensed version of the VAMS Role and Activity Matrix on [page 3](#), the four VAMS clinic user roles should generally align with each user's existing scope of responsibility at your clinic (e.g., the front desk user role has access in VAMS to perform the activities of a front desk employee, including recipient check-in and appointment management).

However, as the clinic administrator, **you can assign multiple user roles to one user**, giving them access to perform additional roles in VAMS.

For example, a healthcare professional at your clinic should be assigned a healthcare professional role in VAMS. You can also assign the front desk role to that healthcare professional user so they have access in VAMS to check in recipients or create appointments.

NOTE: Prior to assigning multiple roles to clinic staff, **it is important to be familiar with the VAMS Role and Activity Matrix** on the next page, which provides a detailed description of the access each user has based on their role(s) in VAMS.

The healthcare professional role must be assigned only to healthcare professionals and other authorized staff because they have access to view recipient personally identifiable information (PII) and protected health information (PHI). Assigning a healthcare professional role in VAMS to a non-healthcare professional or authorized staff is **strictly prohibited**.

□ Step 4: Add Clinic Staff as VAMS Users (continued)

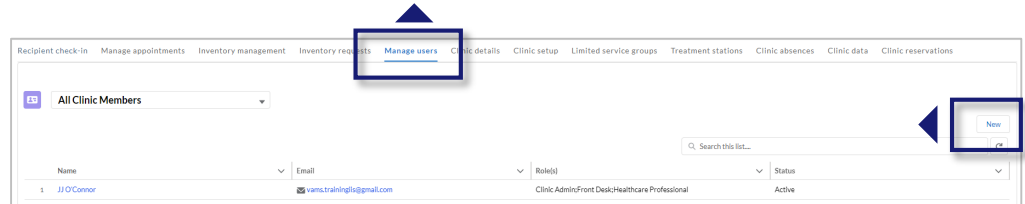
VAMS Role and Activity Matrix

Activity in VAMS	Clinic Administrator	Inventory Manager (optional)	Healthcare Professional	Front Desk
Serve as the clinic POC for your jurisdiction. (Typically, the clinic administrator serves as the clinic POC.)	✓			
Manage clinic information (e.g., shipping address).	✓			
Set and manage clinic schedule.	✓			
Manage (add, edit, remove) VAMS 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 to match appointments scheduled.	✓	✓		
Search for and/or add recipients.				✓
Check in vaccine recipients.				✓
Create walk-in vaccine recipient appointments.				✓
Cancel vaccine recipient appointments.			✓	✓
Confirm vaccine recipient identity.			✓	✓
Access and review vaccine recipient record (name, date of birth [DOB], Prevacination Questionnaire responses, etc.); add notes to record.			✓	
Administer and log vaccination (vaccine information, outcome, and waste if applicable).			✓	
Search for, edit, and invalidate recipient vaccination records.			✓	
View vaccine recipient next-dose eligibility date(s) (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 Scheduled Appointment Report.	✓			
View and export Inventory-Vaccine Level Report.	✓			

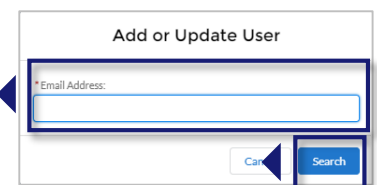
❑ Step 4: Add Clinic Staff as VAMS Users (continued)

➤ 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**.



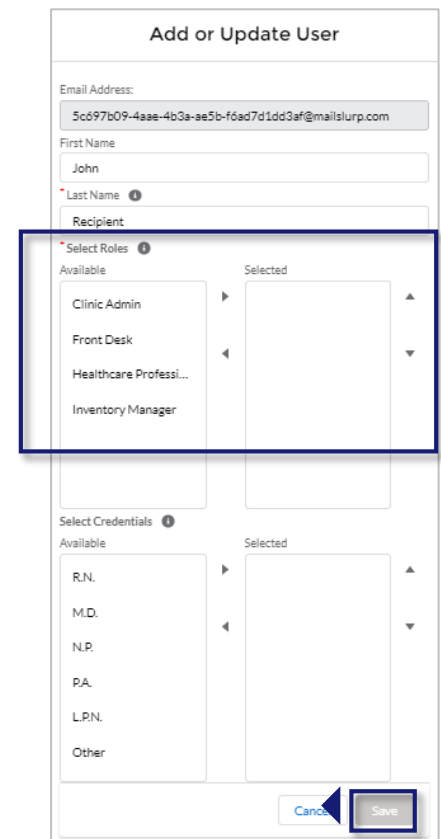
NOTE: This feature searches to see if the user's email address has already been activated in VAMS. For detailed information about adding clinic staff members who are already VAMS users for other clinics, see [Multi-Clinic Users](#) in Section 2.

➤ 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 will provide guidance on how to perform additional tasks in VAMS.

Section 2

Manage Your Clinic in VAMS

Now that you have completed the four steps to set up your clinic in VAMS, you can use the system to perform tasks such as managing your clinic's information, schedule, user access, accessing clinic data reports.

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

Manage Clinic Info

Update your clinic's shipping address, Facility ID, Provider PIN, and Parent Org ID; or deactivate or reactivate your clinic.

Page 20

Manage Clinic Schedule

Set up clinic absences to define time frames during which you want to stop or pause appointments scheduled at your clinic; set appointment rules; set up limited service groups; restrict clinic scheduling; indicate which vaccines your clinic offers; set up clinic reservation tiers; and create a message visible to recipients.

Pages 21–28

Manage VAMS Clinic Users

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

Pages 29–30

Clinic Data Reports

Reports available to view and export include: Vaccination Administration, Scheduled Appointments, and Inventory-Vaccine Level.

Pages 31–34

Manage Clinic Information

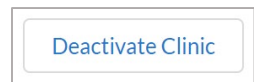
Access and edit information such as your clinic’s shipping address; your clinic’s Facility ID, Provider PIN, and Parent Org ID; deactivate or reactivate your clinic on the **Clinic Details** tab.

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.

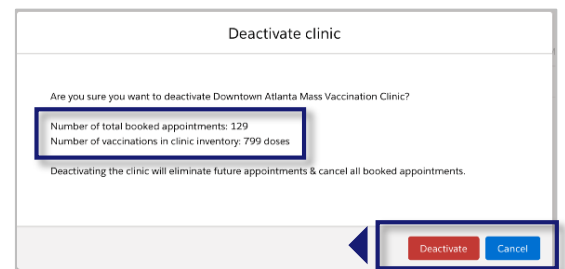
To deactivate your clinic when it is no longer needed to administer COVID-19 vaccines:

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



- A Deactivate Clinic pop-up will appear and ask you to **confirm deactivation**. It will also give you the number of total booked appointments and vaccine doses in your clinic’s inventory.

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



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

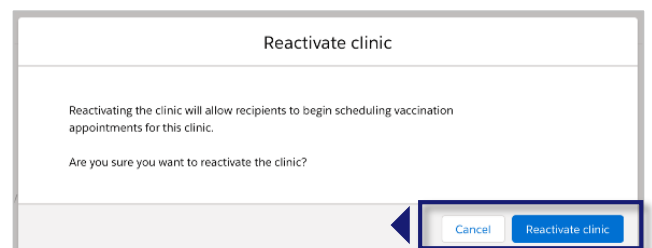
- Send an email to the jurisdiction POC informing them your clinic is deactivated.
- Cancel all recipient appointments booked at your clinic.
- Send a cancellation email to recipients whose appointments are cancelled.
- Remove your clinic in the search results for recipients.
- Deactivate all vaccine inventory requests.
- Close all open appointments.

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**.



Manage Clinic Schedule

As you learned in [Step 3: Set Up Your Clinic's Schedule](#), the following settings and processes affect your clinic's schedule and if/how it appears to recipients in VAMS:

- Appointment duration
- Checking or unchecking the "Available for Scheduling" checkbox to make your clinic available or unavailable for recipients to schedule appointments in VAMS
- Changing your clinic's operating hours by editing or deleting time slots
- Adding or deleting treatment stations
- Changing treatment station operating hours

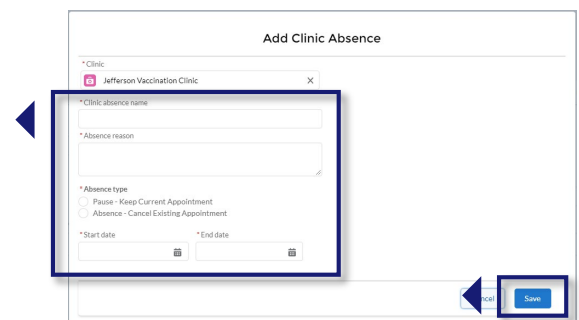
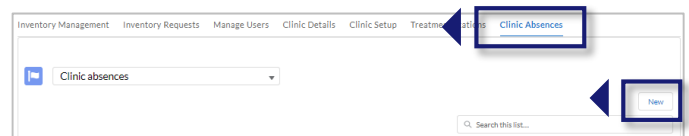
Manage Clinic Schedule in this section provides guidance on other settings in VAMS you can use to manage your clinic's availability for scheduling.

- **Set up clinic absences** to define time frames during which you want to stop or pause appointments scheduled at your clinic. (See below)
- **Set appointment rules** to limit how far out appointments can be scheduled at your clinic and/or stop accepting appointments at a set time each day to limit same-day or next-day appointments. (See page 22)
- **Set up limited service groups** or closed PODs to limit your clinic's visibility in VAMS to members from only select organizations you specify. (See page 23)
- **Restrict clinic scheduling** to the people or groups that are permitted to schedule appointments at your clinic: Recipients and/or Jurisdiction Contact Center users. (See page 24)
- **Indicate which vaccines your clinic offers** for recipients to see prior to scheduling appointments. (See page 24)
- **Set up clinic reservation tiers** to reserve a percentage of appointments for first dose, second dose, and walk-in appointments. (See pages 25–27)
- **Create a message visible to recipients** after they schedule an appointment. (See page 28)

Set Up Clinic Absences

Pause accepting appointments at your clinic without cancelling existing appointments or create an absence that cancels all existing appointments. During a clinic absence, the system will show your clinic as closed and appointments will not be available to recipients.

- Click the Clinic Absences tab.
- On the Clinic Absences tab, click **New** to create a clinic absence.
- Enter the **absence name** and **reason**.
- Select **Pause–Keep existing appointments** to create a temporary absence that will not affect currently scheduled appointments or **Absence–Cancel existing appointments**.
- Enter a **start date**. Adding an end date is optional.
- If you choose to pause and keep appointments, you also have the option to select the applicable scheduling group(s) (Jurisdiction Contact Center or Recipients).
- Once you've made all your selections, click **Save**.



- All clinic absences will appear in the Clinic Absences table. Here you can **edit or delete** them by clicking your clinic name, then clicking Edit or Delete in the upper right corner.



Manage Clinic Schedule *(continued)*

Set Appointment Rules

Limit how far out appointments can be scheduled at your clinic and/or stop accepting appointments at a set time each day to limit same-day or next-day appointments.

NOTE: If you are a mobile clinic, these rules will apply to all locations that fall within your clinic.

- On the **Clinic Details** tab, click **Edit**.
- Go to the **Appointment Rules** section of the page.

To limit how far out appointments can be scheduled at your clinic:

- Enter the **number of days** in advance you want to accept appointments.
 - You must enter a number between 35 and 365. This will allow appointments to be scheduled only for a set number of days based on your selection. For example, specifying a 35-day rolling basis on March 1 will allow appointments to be scheduled only for the next 35 days (through April 5). On March 2, appointments will be allowed to be scheduled only for the next 35 days (through April 6). This will continue until you remove your selection.

Appointment Rules
Set appointment rules to restrict when Recipients and Jurisdiction Contact Centers can schedule appointments. Existing appointments will not be affected.

To limit how far out users can schedule appointments, enter the number of days to be shown as available. For example, setting the limit to 35 days will prevent users from scheduling farther out than 35 days from the day they are attempting to schedule.

Limit appointment availability (optional - must be between 35 and 365 days)

To limit same-day or next-day appointments, you can specify a start time as 6:00PM and the duration as 16 hours. As a result, users trying to schedule appointments at 6:00PM will see 10:00PM the following day as the next available appointment.

Start Time	Duration (Hours)
6:00 PM	16 hours

- Click **Save**.

To stop accepting appointments at a set time every day:

- Enter a **time** you want to stop accepting appointments each day in the Start Time field.
- Select a **duration** to stop accepting appointments from the drop-down menu.
 - Duration options are available in 4-hour increments from 12 to 36 hours. For example, if you want to limit same-day or next-day appointments, you can set the start time to 6:00 PM and the duration to 18 hours. This will prevent recipients and Jurisdiction Contact Center users from scheduling appointments between 6:00 PM today and 12:00 PM the next day.
 - This rule does not apply to clinic users, who can always schedule appointments on behalf of recipients.
- Click **Save**.
- To remove these preferences in the future, click the **Edit** button, then delete the start time, set the duration to none, and click **Save**.

Manage Clinic Schedule *(continued)*

Set Up Closed PODs (Limited Service Groups)

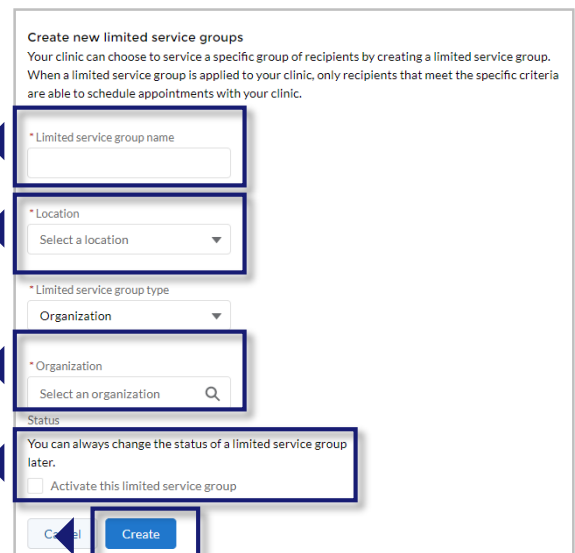
Establish closed PODs (points of dispensing), known in the system as limited service groups, to limit your clinic’s visibility in VAMS to members from only select organization(s) you specify. This means your clinic will only be visible in search results to members of the organization(s) you choose.

NOTES:

- You can only add organizations that are already registered in VAMS.
- You can establish up to 10 limited service groups.
- Your clinic will not be visible to anyone outside of the selected organization as long as your clinic has active limited service groups. If all of your clinic’s limited service groups are inactive, your clinic will be visible to all VAMS recipients.

To establish a limited service group:

- Click the **Limited Service Groups** tab.
- Click the **Create** button in the upper right corner of the page.
- Name the limited service group (e.g., “Memorial Hospital Employees COVID-19 Vaccination Clinic”).
- Select your clinic’s name in the **Location drop-down menu**.
 - The Limited Service Group Type field will auto-fill to Organization, which is currently the only option available.
- Search for the organization you are limiting your clinic to and select the appropriate organization with the correct address from the drop-down list that populates. **NOTE:** Only registered VAMS organizations in your jurisdiction will appear in this drop-down menu. If the organization you are searching for does not appear in the list, contact your jurisdiction POC to confirm the organization’s registration status.
- Click the **Activate this Limited Service Group** checkbox.
- Click **Create**.
- Repeat this process to add additional limited service groups, if necessary.



Create new limited service groups
Your clinic can choose to service a specific group of recipients by creating a limited service group. When a limited service group is applied to your clinic, only recipients that meet the specific criteria are able to schedule appointments with your clinic.

- * Limited service group name
- * Location
Select a location
- * Limited service group type
Organization
- * Organization
Select an organization
- Status
You can always change the status of a limited service group later.
 Activate this limited service group

Cancel Create

To edit or deactivate a limited service group:

In the Limited Service Groups table, click the hyperlinked name of the group you want to edit. On the Group Details page, you can edit fields directly and **deselect** the Active checkbox, then click **Save**. Deactivating a limited service group does not remove it from the Limited Service Groups table. To reactivate a group, you can select the group’s name in the table and click Reactivate.

To allow Jurisdiction Contact Centers to override limited service groups:

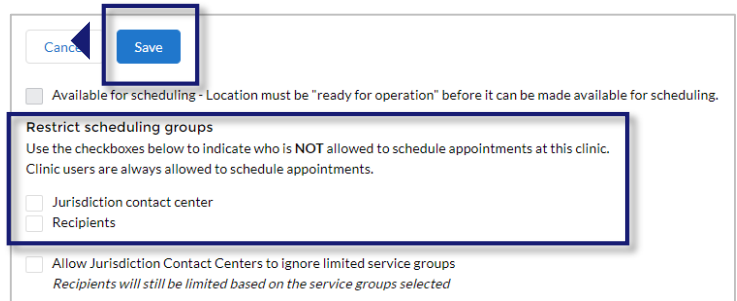
If a clinic is restricted to limited service groups, you can allow Jurisdiction Contact Centers to schedule appointments at your clinic for recipients who do not belong to a limited service group. To set up this feature, navigate to the Clinic Location record by clicking the Clinic Setup tab. Under the Restrict Scheduling Groups section, click the “Allow Jurisdiction Contact Centers to ignore limited service group rules” checkbox and click **Save**.

Manage Clinic Schedule *(continued)*

Restrict Clinic Scheduling

Select any group(s)—Recipients and/or Jurisdiction Contact Center users—you **do not** want to schedule appointments at your clinic.

- To restrict clinic scheduling to select group(s), navigate to the **Clinic Location** record by clicking the **Clinic Setup** tab.
- Click your clinic **name** in the Clinic Locations table.
- Click **Edit**.
- Under the **Restrict Scheduling Groups** section, select any group(s) you **do not** want to schedule appointments at your clinic (e.g., selecting Jurisdiction Contact Center will prevent Contact Center users from scheduling appointments at your clinic).
- If you do not select either group, your clinic will be visible to recipients and Jurisdiction Contact Centers. Clinics are always visible to that clinic’s staff.
- Once you’ve made your selections, click **Save** at the top of the page.
- Note this is also where you can allow Jurisdiction Contact Centers to override limited service groups as mentioned on the previous page.



Cancel Save

Available for scheduling - Location must be "ready for operation" before it can be made available for scheduling.

Restrict scheduling groups
Use the checkboxes below to indicate who is NOT allowed to schedule appointments at this clinic. Clinic users are always allowed to schedule appointments.

Jurisdiction contact center

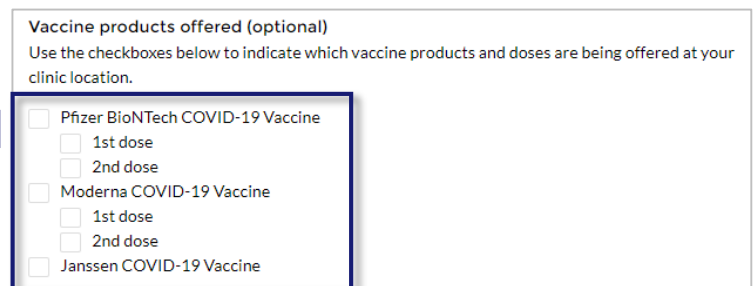
Recipients

Allow Jurisdiction Contact Centers to ignore limited service groups
Recipients will still be limited based on the service groups selected

Indicate Which Vaccines Your Clinic Offers

Indicate which vaccines your clinic offers for recipients to see prior to scheduling appointments. These selections will appear to recipients on the Find a Clinic screen and Appointment Review screen prior to booking their appointments. Selecting these vaccine offerings is optional for clinics. This functionality will not prevent a recipient from scheduling an appointment with a clinic that does not currently have the corresponding vaccine product in their inventory.

- To select which vaccines your clinic offers, navigate to the **Clinic Location** record by clicking the **Clinic Setup** tab.
- Click your clinic **name** in the Clinic Locations table.
- Click **Edit**.
- Under the Vaccine Products Offered section, select the checkboxes for the different vaccine products you offer (Moderna, Pfizer-BioNTech, and/or J&J/Janssen).
- Once you’ve made your selections, click **Save** at the top of the page.



Vaccine products offered (optional)
Use the checkboxes below to indicate which vaccine products and doses are being offered at your clinic location.

Pfizer BioNTech COVID-19 Vaccine

1st dose

2nd dose

Moderna COVID-19 Vaccine

1st dose

2nd dose

Janssen COVID-19 Vaccine



Manage Clinic Schedule *(continued)*

Set Up Clinic Reservation Tiers

Appointment reservation tiers allow standard and mobile clinics to allocate percentages of appointment capacity for each of the four appointment types: first dose, second dose, walk-in, and first come, first served (referred to in VAMS as “free for all,” these are any appointments not allocated to first dose, second dose, or walk-in appointments). Appointment reservation tiers allow clinics to have more flexibility in constructing their schedules and reserving appointments for specific types.

The reservation tiers are rolling time frames (with day 1 always being the current day) during which the reservation percentages are in effect. The tiers are based on vaccine protocol and allow clinics to set different percentages for different time periods if they anticipate their needs changing as recipients return for a second dose. VAMS updates tiers as protocols and vaccine availability change.

Tier 1

Tier 1 is the percentage of appointments available for each appointment type, on a rolling basis, for the first 20 days out from the current date.

Consider allocating the highest percentage for first-come, first-served appointments in this tier so that most availability in this 20-day time frame is open to any individual who needs an appointment (i.e., first or second dose). Consider allotting a small percentage of appointments for walk-ins based upon clinic forecasting.

Duration of Tier 1: Current Day–20 Days Out

Tier 2 appointments have start dates consistent with the recommended time frames for second doses based on the vaccine product. There are two kinds of Tier 2 appointments to account for the different recommended intervals between doses.

Tier 2a (Pfizer-BioNTech)

Tier 2a is to accommodate the first week Pfizer-BioNTech vaccine recipients would be eligible for their second dose. This tier is the percentage of appointments available for each appointment type, on a rolling basis, for 21–27 days out from the current date.

If your clinic administers Pfizer-BioNTech vaccine, **consider allocating a higher percentage for second dose appointments and a lower percentage for first dose appointments** in this tier to accommodate recipients ready to schedule their second dose after 21 days. Use the walk-in appointment allocation in this tier to reduce clinic capacity. This will block any appointment capacity you would like to become available when a date in time reaches Tier 1 eligibility.

Duration of Tier 2a: 21–27 Days Out

Tier 2b (Moderna)

Tier 2b is to accommodate the first week Moderna recipients would be eligible for their second dose. This tier is the percentage of appointments available for each appointment group, on a rolling basis, for 28–34 days out from the current date.

If your clinic administers Moderna vaccine, **consider allocating a higher percentage for second dose appointments and a lower percentage for first dose appointments** in this tier to accommodate recipients ready to schedule their second dose after 28 days. Use the walk-in appointment allocation in this tier to reduce clinic capacity. This will block any appointment capacity you would like to become available when a date in time reaches Tier 1 eligibility.

Duration of Tier 2b: 28–34 Days Out

Manage Clinic Schedule *(continued)*

Set Up Clinic Reservation Tiers *(continued)*

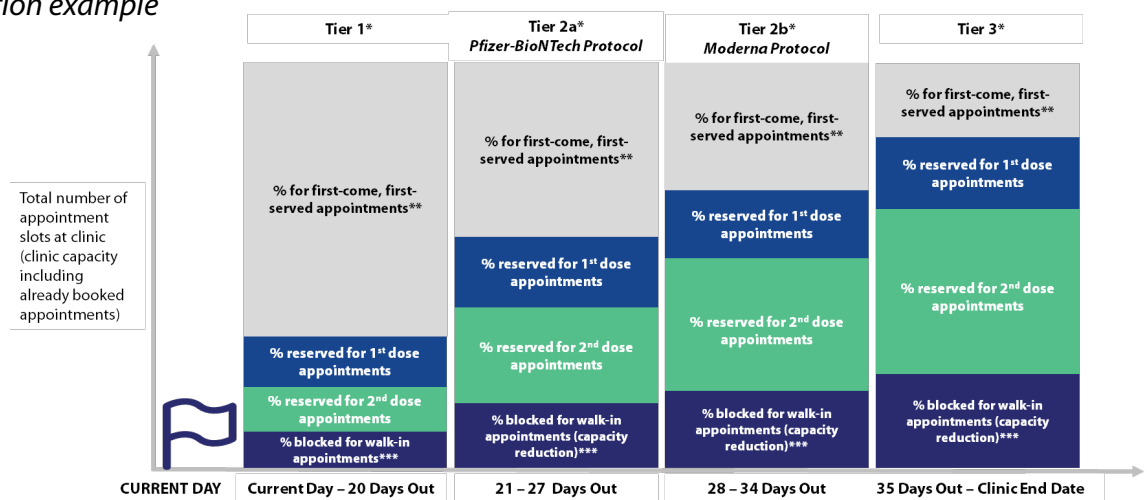
Tier 3

Tier 3 is the percentage of appointments available for each appointment type, on a rolling basis, for 35 days onward from the current date.

Duration of Tier 3: 35 Days Out–Clinic End Date

Consider allocating percentages that make up your clinic’s ideal mix of appointment types (except for walk-ins) in this tier. Use the walk-in appointment allocation in this tier to reduce clinic capacity. This will block any appointment capacity you’d like to become available when a date in time reaches Tier 1 eligibility.

Reservation Tier Allocation example



*Tiers are broken down based upon vaccine protocol (Pfizer-BioNTech second dose eligibility at day 21, Moderna second dose eligibility at day 28).

**First-come, first-served appointments are the appointments not allocated to first doses, second doses, or walk-ins.

***Blocked walk-in appointments are not available for scheduling by recipients. In tiers 2a, 2b, and 3, allocating a percentage of appointments available to walk-ins reduces clinic capacity, helping ensure appointments are available to recipients in earlier tiers (e.g., blocking 10% for walk-ins in Tier 3 and 7% for walk-ins in Tier 2b will open up 3% further capacity that can then be booked by recipients).

Allocate Percentages of Appointments at Your Clinic

Your jurisdiction may have already allocated percentages for appointments at your clinic. If so, you will see a message when you click the **Clinic Reservations** tab telling you the percentages have been set. You may override their settings at any time by clicking the **View Appointment Reservations** button to review or edit the reservations.

Edit or Allocate New Percentages

- **Click the Clinic Reservations** tab. On this page, you will see a table with the tiers listed in rows and appointment type percentages listed in columns.
- **Hover** over a cell within the table you want to edit (see the example below where we have hovered over the cell Tier 1, % Reserved for First Doses cell) until you see the **pencil icon** in the right corner of the cell.
- **Click the pencil icon** to edit the percentage set for the appointment type in that tier.
- Enter a **whole number percentage** (e.g., 20) in each editable column for each tier. Press **Enter** or click out of the field after each number you type.



Manage Clinic Schedule *(continued)*

Set Up Clinic Reservation Tiers *(continued)*

Edit or Allocate New Percentages *(continued)*

➤ When you finish entering all percentages, click **Save** underneath the table.

Tier ↑	Duration of tier	% Reserved for First-Doses	% Reserved for Second-Doses	% Reserved for Walk-Ins	% Reserved for Free-For-Alls
1 Tier 1	Day 1 - 16	0	35	2	98
2 Tier 2a	Day 17 - 27	20	35	4	41
3 Tier 2b	Day 28 - 34	25	40	4	31
4 Tier 3	Days 35 and onward	25	50	6	19

NOTE: To see another graphic that explains the tiers, click **View This Infographic** above this table in VAMS.

Quick Tips for Allocating Appointment Type Percentages

- **You only need to allocate percentages for first dose, second dose, and walk-in appointments when setting tiers.** Any percentage left over after adding up the first dose, second dose, and walk-in percentages will automatically allocate to first-come, first-served appointments (any dose). **For example:** If first dose allocation is 25%, second dose is 50%, and walk-in is 15%, the remaining 10% of appointments will be allocated to the first-come, first-served appointment type.
- **Use walk-in appointments in Tier 3, Tier 2b, and Tier 2a as a way to reduce clinic capacity in a tier.** By lowering the walk-in percentage from Tier 3 to Tier 2b to Tier 2a to Tier 1, you can ensure appointments are available for booking in all tiers. Use walk-in appointments in Tier 1 as a way to reduce capacity and accommodate actual clinic walk-ins.
- For Tier 1, consider setting first and second dose reservation percentages to **0%** so your clinic can book to full capacity. This will automatically allocate 100% of appointments not allocated for walk-ins as first come, first served.
- If you would like to have a first dose-only clinic, set the first dose appointment percentages to **100%** for all tiers.
- If you would like to have a second dose-only clinic, set the second dose appointment percentage to **100%** for all tiers.
- If you want your clinic to remain open to all recipients on a first-come, first-served basis, set first dose, second dose, and walk-in percentages in all tiers to **0%**.
- The J&J/Janssen vaccine is considered a first dose in VAMS. Adjust first dose appointments across all tiers accordingly based upon expected inventory.

Notes About Allocating Appointment Type Percentages

- **Tiers will not change previously booked appointments.** If your clinic already has booked appointments, it may take several weeks to see results of clinic reservation percentage tiers. In addition, tiers will not allow your clinic to go over capacity (e.g., setting a second dose percentage in a tier to 50% when 60% of clinic capacity is already second dose appointments does not mean your clinic will book to 110% capacity).
- **If you do not customize your percentages and your jurisdiction did not set them for you, your clinic will not have tiers activated and all appointments will book as first come, first served.**

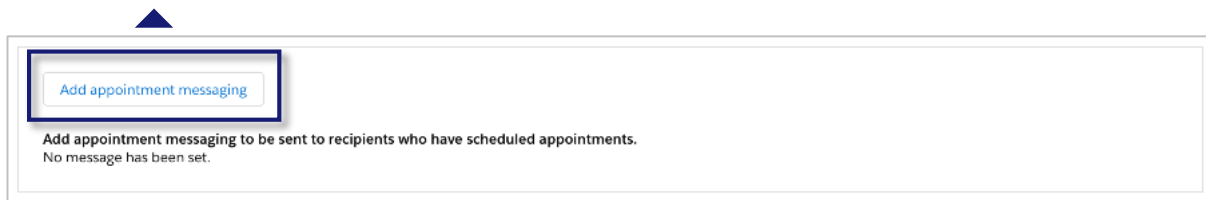
Manage Clinic Schedule *(continued)*

Create a Message Visible to Recipients

Create a message that is visible to recipients after they schedule an appointment at your clinic. Recipients will see this message as “a note from the clinic” below the QR code on their **Appointment Review** screen, **Appointment Confirmation** page, the **View Appointment** page in the Recipient Portal, and in their appointment confirmation email. This message will also be visible on the **Appointment Confirmation** page to jurisdictions and clinics scheduling appointments on behalf of recipients.

NOTE: Any messages you add will also appear for currently scheduled appointments on the recipients’ **View Appointment** pages in VAMS.

- To create a message that is visible to recipients after they schedule an appointment at your clinic, navigate to the **Clinic Location** record by clicking the **Clinic Setup** tab.
- Click your clinic **name** in the Clinic Locations table.
- Click **Add Appointment Messaging** at the bottom of the Clinic Location Details page.



- Enter a message with no more than 1,000 characters.
- Click **Save**.



- To **edit** the message in the future, return to the Clinic Location Details page and click **Edit** in the Appointment Messaging box.

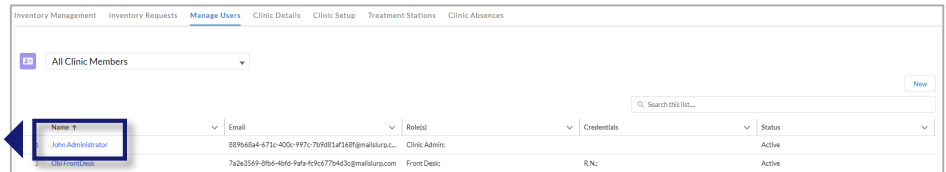


Manage VAMS Clinic Users

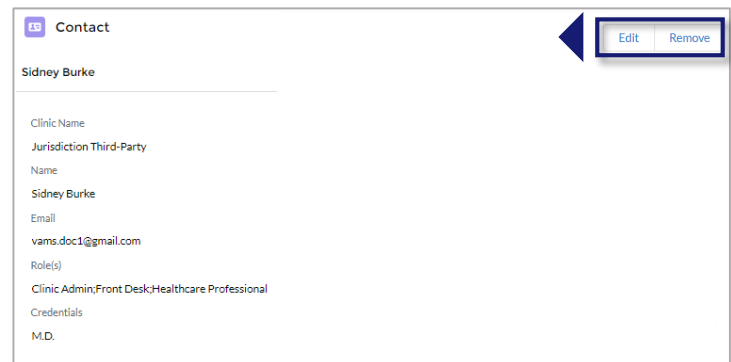
On the Manage Users tab, you can edit a user record, remove a VAMS user, or add a multi-clinic user.

Edit or Remove a VAMS Clinic User

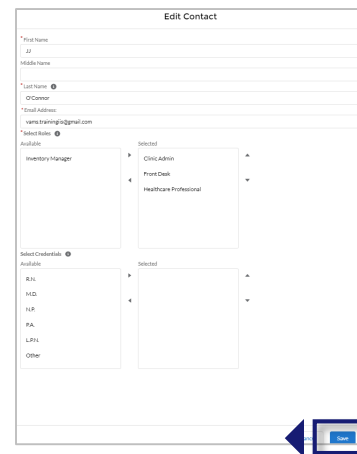
- To **edit a user's information**, click the **user's name** in the Clinic Members table.



- 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.

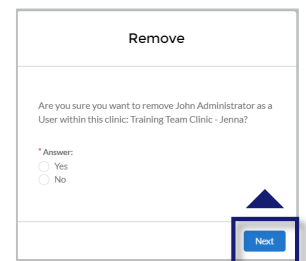


- If you edit the user's record, click **Save**.



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 on [page 53](#). 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.

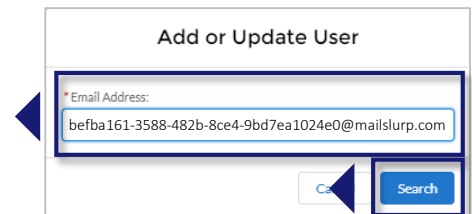
Manage VAMS Clinic Users *(continued)*

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.

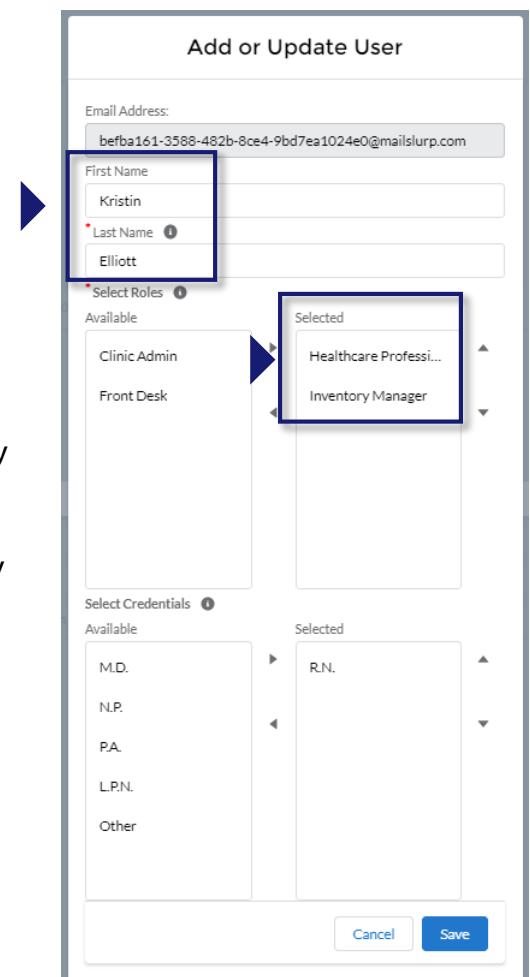
- In the **Add or Update User** pop-up window, enter the user's **email address** and click **Search**.

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



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

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



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



Clinic Data Reports

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

- **Scheduled Appointments Report:** Contains data on scheduled appointments at your clinic, including appointment date/time/status and recipient information.
- **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:
 - **Scheduled Appointments Report** for today, next 7 days, and next 30 days.
 - **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:
 - **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:**

- | | |
|--|---|
| <ul style="list-style-type: none"> • Clinic name • Appointment 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) | <p>The Vaccination Administration Report can be filtered by date administered:</p> <ul style="list-style-type: none"> • Today • Past 7 days • Past 30 days |
|--|---|

Clinic Data Reports *(continued)*

Scheduled Appointment Report

✓ Clinic Administrators

This report includes the following **data on scheduled appointments at your clinic:**

- Appointment date
- Appointment start time
- Appointment status
- Appointment address
- Recipient name (first, middle, last)
- Recipient date of birth
- Recipient gender
- Recipient mailing address (state, city, street, etc.)
- Recipient phone number
- Recipient email address
- Recipient demographic information (race, etc.)
- Recipient dose information (first/second dose, vaccine name, source, etc.)
- Recipient insurance information (if applicable)

Date Of Birth	Gender	Mailing Street	Mailing City	Mailing State/Province	Mailing Zip/Postal Code	Cell Phone	Email	Race	Vaccine Name	Source
11/18/1978	Female	123 Main St.	Detroit	Michigan	48227	5555555555	vamsuser03@hotmail.com	White	Pfizer-BioNTech COVID-19 Vaccine	VAMS
1/23/1985	Male	1500 Main St	Detroit	Michigan	48207	1234567890	vamsuser1500@hotmail.com	Black or African American		
10/10/1985	Male	3749 Hetten Lane	Woodbridge	Virginia	22193	2107741770	vams.mdrecipient@gmail.com	White		VAMS

The Scheduled Appointment Report can be **filtered by scheduled start:**

- Today
- Next 7 days
- Next 30 days
- Clinic Capacity*

*The **Clinic Capacity Report** allows you to view appointment availability based on the number of appointments that are currently booked at your clinic for a time frame you select; the default time frame is 60 days.

This report includes the following data on your clinic’s appointment capacity and utilization:

- Total capacity
- Total booked
- Remaining available
- Available capacity percentage
- Dose breakdown (e.g., dose 1 appointments booked, dose 2 appointments booked)

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.**

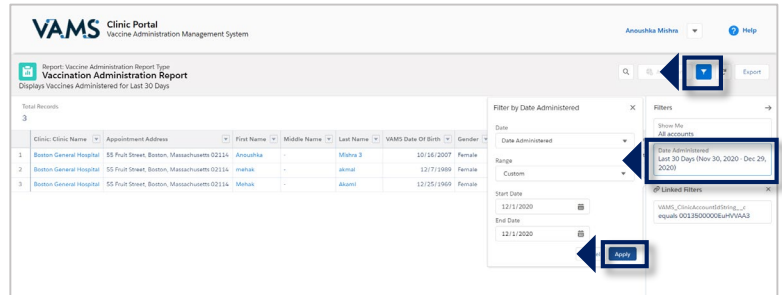
Manufacturer	Product	Doses Remaining
Moderna US, Inc. (1)	Moderna COVID-19 Vaccine	77
Subtotal		77
Pfizer Manufacturing Belgium NV (1)	Pfizer-BioNTech Covid-19 Vaccine	2,999
Subtotal		2,999
Sanofi-Pasteur (1)	COVID-A	130
Subtotal		130
Total (3)		3,206

Clinic Data Reports *(continued)*

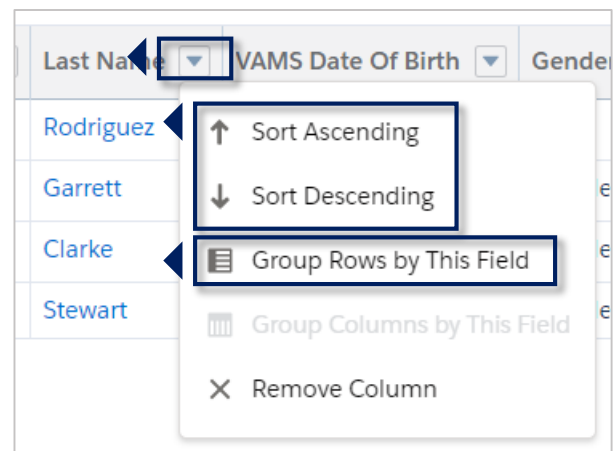
Interact with Report Data

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.

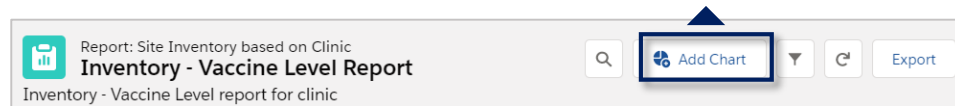
- **Filter:** Filter data by clicking the **filter icon** in the top right corner of the screen. You can filter vaccination administration and scheduled appointment reports by administration date and scheduled start date, respectively.



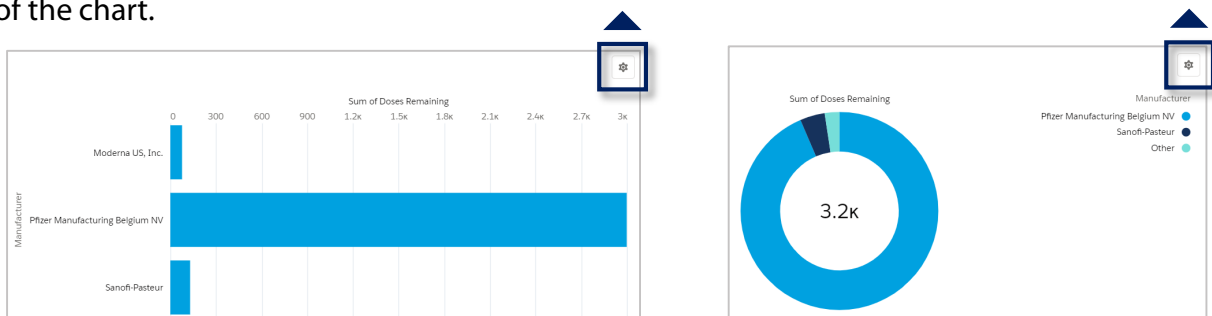
- **Sort:** Sort data by clicking the **arrow** on the right side of each column header within a report. From the drop-down menu, you can select how you want to sort the data in the report.
- **Group:** Group data by clicking the **arrow** on the right side of each column header within a report. From the drop-down menu, you can select to group the report by the data in that column by selecting "Group Rows by This Field."



- **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

Clinic Data Reports *(continued)*

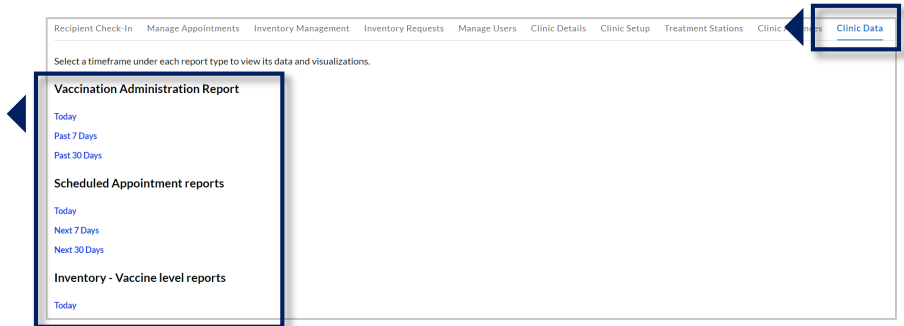
Export Report Data

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

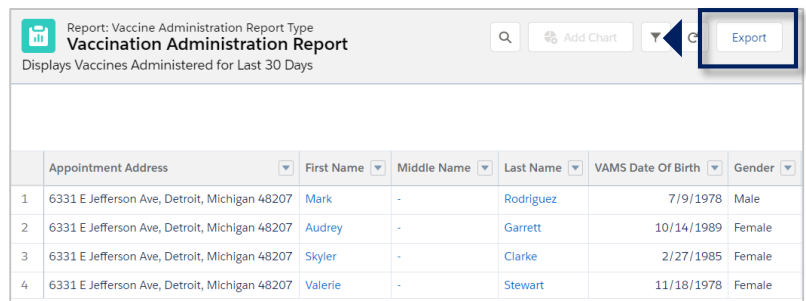
- **Formatted** includes the report header, groupings, and filter settings and can only be exported in Excel (.xlsx) format.
- **Details Only** includes only the detail rows.

To export a report:

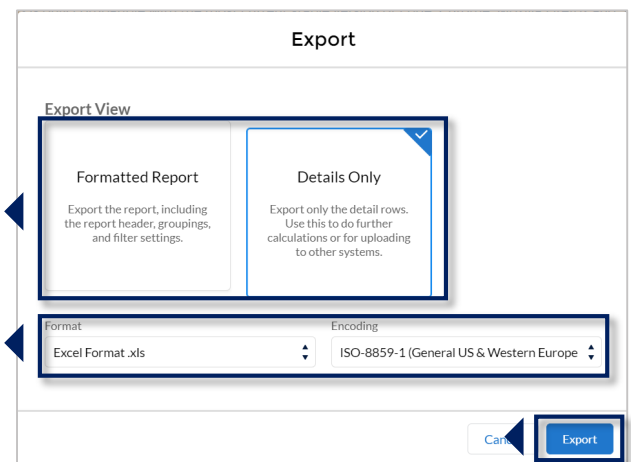
1. From the **Clinic Data** tab, select the **report** and **time frame** you want to view (e.g., Vaccination Administration report for the past 30 days).



2. Click **Export** in the top right corner of the screen.



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 3

COVID-19 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

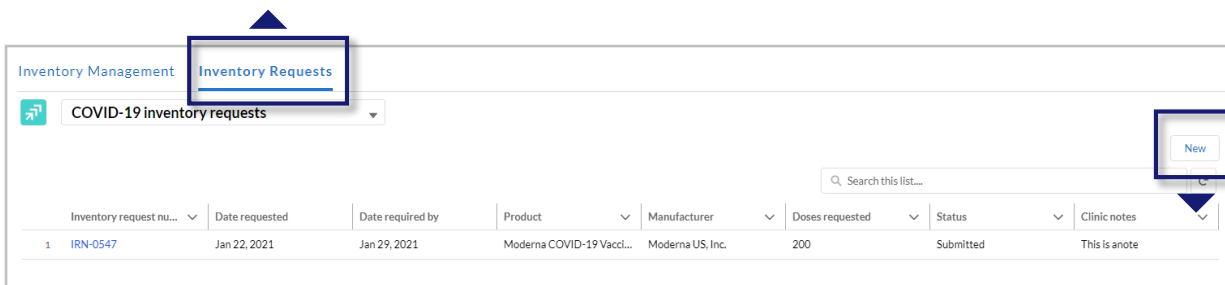
You will place your COVID-19 vaccine inventory requests in VAMS to your jurisdiction’s POC. This crucial process will allow you to ensure your clinic has enough inventory on hand to administer vaccines to recipients. **While you will place all inventory requests in VAMS, the jurisdiction POC will place all COVID-19 vaccine orders outside of VAMS through an established process determined by the jurisdiction.**

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

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

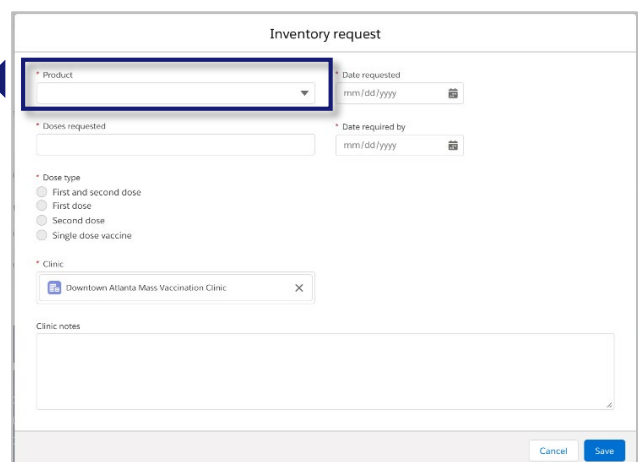
The Inventory Requests tab shows you a list of all inventory requests you’ve submitted. This list includes a system-generated **inventory request number**, **product type** (vaccine type) requested, **manufacturer**, **date requested** and **required**, number of **doses requested**, and **notes**.

- Click the **Inventory Requests** tab on your clinic’s home page.



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

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

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

- Enter the **number of vaccine doses** you are requesting.
- Select the **dose type** 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.
- If desired, you can add a note for the jurisdiction POC in the Clinic Notes field.

➤ 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.

Inventory request nu...	Date requested	Date required by	Product	Manufacturer	Doses requested	Status	Clinic notes
1 IRN-0547	Jan 22, 2021	Jan 29, 2021	Moderna COVID-19 Vaccl...	Moderna US, Inc.	200	Submitted	This is anote

From the inventory request record, you can:

View Inventory Request details.

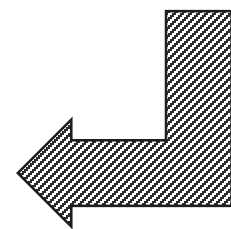
This section of the record has details about the inventory request.

Communicate with the jurisdiction POC.

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

Monitor or follow comments made to your posts.

Like you would on a social media platform, click the **Follow** button to receive email notifications when the jurisdiction POC responds to a post you make in the inventory request record. You will **not** receive notifications for new posts.



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

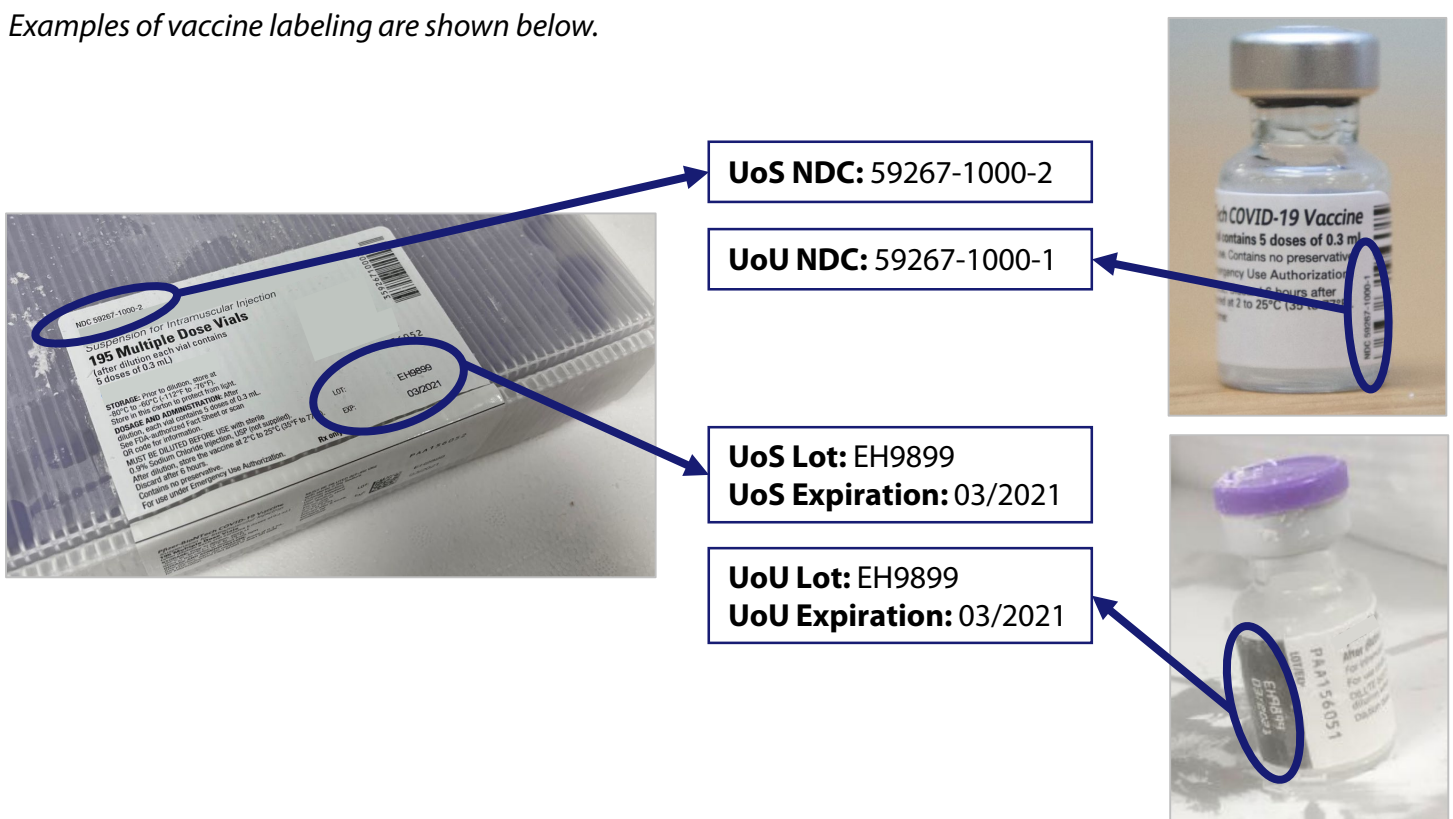
- UoS NDC is shown on the package label.
- UoU NDC is shown on the vial label.

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.



The diagram illustrates vaccine labeling examples. On the left, a box of '195 Multiple Dose Vials' is shown with blue circles highlighting the NDC number (59267-1000-2) and the lot number (EH9899). On the right, two vials are shown. The top vial has a white label with a blue circle around the NDC number (59267-1000-1). The bottom vial has a purple cap and a white label with a blue circle around the lot number (EH9899). Arrows point from these circles to callout boxes containing the following information:

- UoS NDC:** 59267-1000-2
- UoU NDC:** 59267-1000-1
- UoS Lot:** EH9899
- UoS Expiration:** 03/2021
- UoU Lot:** EH9899
- UoU Expiration:** 03/2021

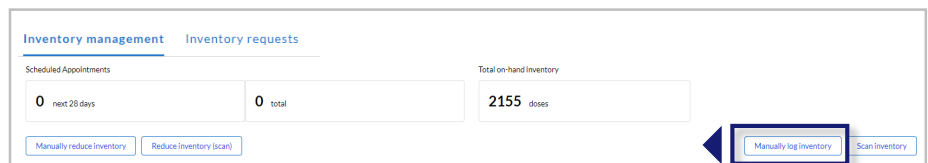
Log COVID-19 Vaccine Inventory

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.



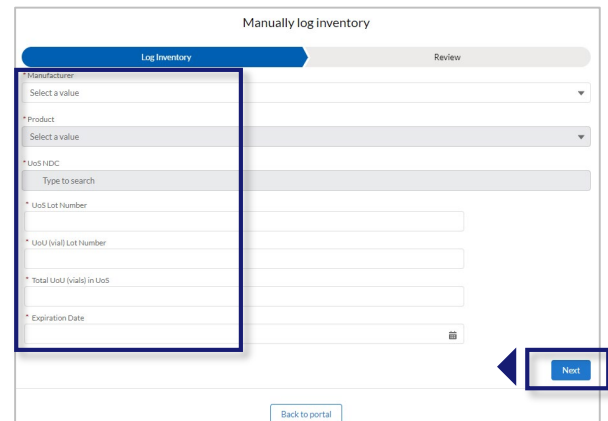
The screenshot shows the 'Inventory management' tab with 'Inventory requests' sub-tab. It displays 'Scheduled Appointments' with '0 next 28 days' and '0 total', and 'Total on-hand inventory' with '2155 doses'. At the bottom, there are buttons for 'Manually reduce inventory', 'Reduce inventory (scan)', 'Manually log inventory', and 'Scan inventory'. The 'Manually log inventory' button is highlighted with a blue box and an arrow.

- 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**.



The screenshot shows the 'Manually log inventory' form. It has a 'Log Inventory' header and a 'Review' button. The form contains several fields: 'Manufacturer' (dropdown), 'Product' (dropdown), 'UoS FIDC' (text), 'UoS Lot Number' (text), 'UoU (vial) Lot Number' (text), 'Total UoU (vials) in UoS' (text), and 'Expiration Date' (text). The 'Next' button at the bottom right is highlighted with a blue box and an arrow.

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

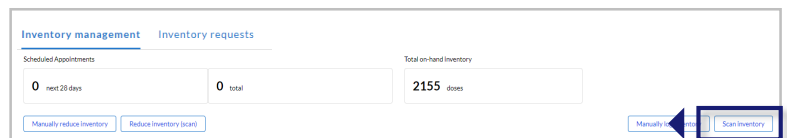
Log COVID-19 Vaccine Inventory *(continued)*

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**.

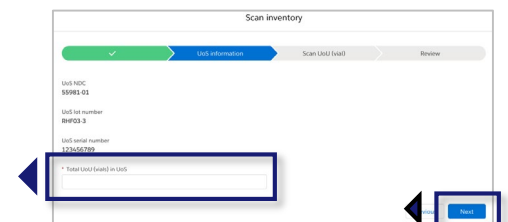


NOTE: You **must** scan each UoS **individually**. Each UoS contains multiple vials or UoUs. When logging inventory, you must scan one UoU from each UoS. See the step-by-step instructions below.

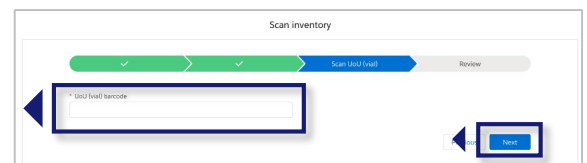
- When the Scan Inventory pop-up appears, **scan the UoS barcode** on the vial with your 2D barcode scanner. The barcode will appear in the UoS barcode field.
- Select the vaccine **manufacturer** from the drop-down menu, then click **Next**.



- 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.

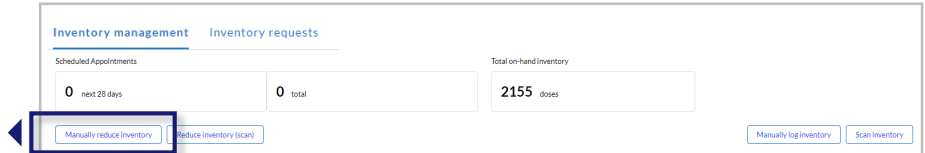
Reduce Vaccine Inventory

Similar to how you log vaccine inventory, you can reduce vaccine inventory in VAMS in **two ways**:

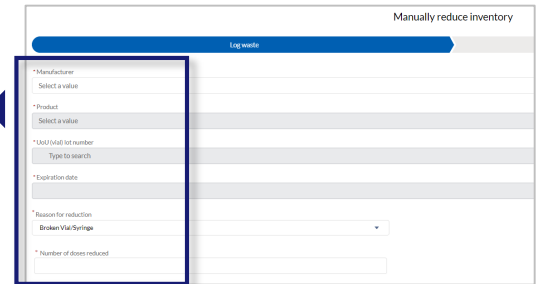
- Manually enter the information on the vaccine packaging and vials.
- Use a 2D barcode scanner to scan the barcodes on the vaccine vials.

Reduce Vaccine Inventory Manually

- On the Inventory Management tab, below the available appointments data, click the **Manually Reduce Inventory** button.



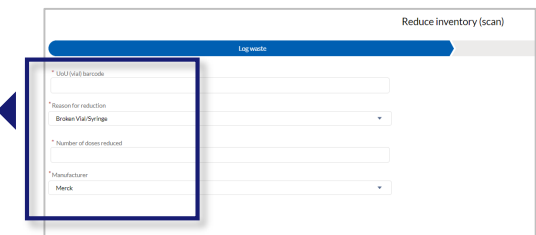
- In the Manually Reduce Inventory pop-up window, enter the manufacturer name, product, and UoU lot number.
- The expiration date will auto-populate and cannot be changed.
- Select a **reason for reduction**.



- 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

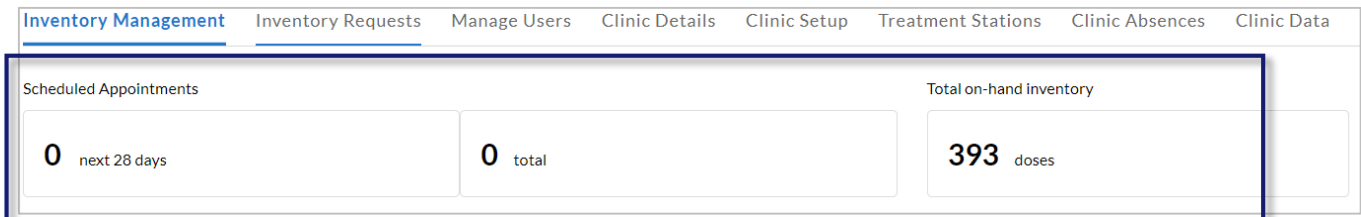
- On the Inventory Management tab, below the available appointments data, click the **Reduce Inventory (Scan)** button.
- When the Reduce Inventory (Scan) pop-up window appears, **scan the UoU barcode** on the vial with your 2D barcode scanner.
- **Enter** the required information in the Reduce Inventory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





Monitor COVID-19 Vaccine Inventory Levels

Clinic administrators and inventory managers can use the Inventory Management 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.



This tab gives you a snapshot of:

- The number of **appointments available** at your clinic over the next 28 days (including the current day).
- The total number of **appointments booked** at your clinic.
- 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 your 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, see [Clinic Data Reports](#) in Section 2 for how to access the Inventory-Vaccine Level Report. As inventory managers do not have access to the Clinic Data tab, they cannot view the Inventory-Vaccine Level Report.

Section 4

Additional VAMS Functionality

This section will show you how to complete clinic administration tasks in VAMS that occur less frequently than the tasks described in [Section 2: Manage Your Clinic in VAMS](#).

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

Mobile Clinic
Locations/Operating Hours

Are you a clinic administrator for a **mobile clinic**?

Learn how to add locations and set operating hours for your **mobile clinic**.

Multi-Clinic User

Do you work at **multiple** clinics?

Learn how to access different clinics in VAMS if you will be **working at multiple vaccination clinics** and become a multi-clinic user.

COVID-19 Vaccine Eligibility
for Clinic Staff

Do you want to **enable your clinic staff to register as recipients in VAMS**?

If you or **your clinic staff want to register as recipients in VAMS**, follow the process outlined in this section.

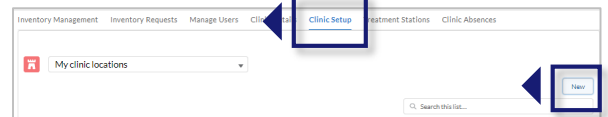
Mobile Clinic Locations and Operating Hours

Mobile clinics are those with multiple locations for vaccination (e.g., mobile clinic bus or van). These clinics can change their physical address but must have a permanent shipping address to receive inventory.

After completing your mobile clinic’s registration by following the same process outlined in [Step 2: Register Your Clinic](#) and selecting an appointment duration on the Clinic Details tab as outlined on [page 10](#), you can add new locations for your mobile clinic and set up operating hours for each location.

Add New Clinic Location

- Click the **Clinic Setup** tab to view the Clinic Locations table. This table shows all clinic locations you added and is where you can edit or delete them.



- Click **New** in the upper right corner of the table to add a clinic location.

- Click in the **Clinic** field and select your **clinic** from the populated results.
- Name the **clinic location**, enter the **address**, and select the **time zone**.

Quick Tip: Consider using a standard naming convention for your mobile clinic location names.

- Enter the **start** and **end dates** this clinic location will be active and available for recipient appointments.

NOTE: If you enter start and end dates that overlap with dates already set for another location, you will receive an error message. VAMS will not allow you to have two locations with overlapping start and end dates.

- Click in the **Operating Hours** field and select **New Clinic Operation Hours** from the drop-down menu.
- Name the **operating hours** in the pop-up window, then click **Save**.
- Click **Save** in the New Location pop-up window.

Set Operating Hours for a New Clinic Location

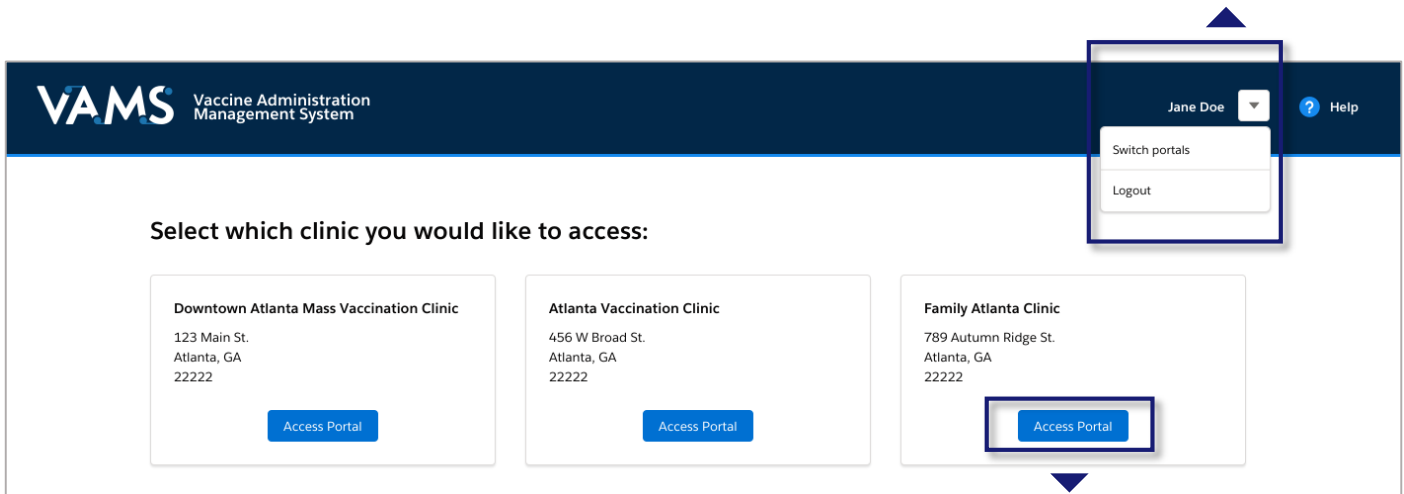
- To set operating hours for each new clinic location, you will follow the same process outlined in [Step 3b. Set Operating Hours for Your Clinic](#). Note that you must set operating hours for each mobile clinic location you add in VAMS.
- When you want this new location to be available for recipients to schedule appointments during the start and end dates you set, check the **“Available for Scheduling”** checkbox at the top of the **Clinic Location Details** page. You can edit this setting at any time.
- Click **Save**.

Guidance on other settings in VAMS you can use to manage your clinic’s availability for scheduling is provided in Section 2, [Manage Clinic Schedule](#).

Access Multiple Clinics in VAMS

You may need to perform the same or different user roles at multiple clinics. After a clinic administrator at another 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 shows the VAMS interface. At the top left is the VAMS logo and 'Vaccine Administration Management System'. On the top right, the user 'Jane Doe' is logged in, with a dropdown menu open showing 'Switch portals' and 'Logout'. The main content area is titled 'Select which clinic you would like to access:' and contains three clinic cards:

- Downtown Atlanta Mass Vaccination Clinic**: 123 Main St. Atlanta, GA 22222. Access Portal button.
- Atlanta Vaccination Clinic**: 456 W Broad St. Atlanta, GA 22222. Access Portal button.
- Family Atlanta Clinic**: 789 Autumn Ridge St. Atlanta, GA 22222. Access Portal button (highlighted with a red box).

- 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)*

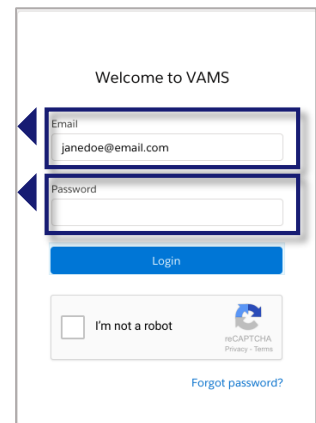
2. Register Your Clinic as an Organization

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**.

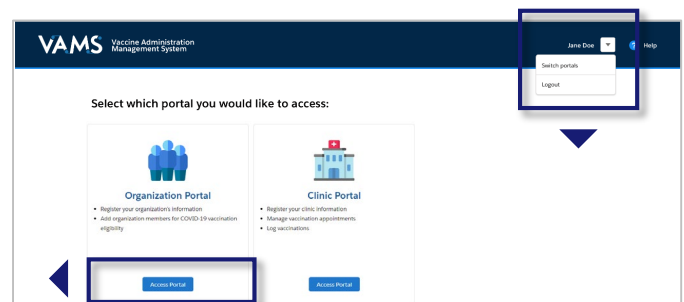
- On the next screen, enter the **email address** you use for your clinic user log-in.
- Enter the **same password** you use when logging in as a clinic user. Complete the **reCAPTCHA**, then click **Login**.



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.



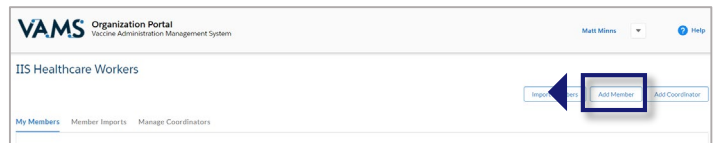
Enable Recipient Registration in VAMS for Clinic Staff *(continued)*

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:

- First Name is limited to 80 characters
 - Last Name is limited to 80 characters
 - Email address must contain an "@" sign and valid domain (.com, .gov, etc.) or an error message will appear
 - 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.

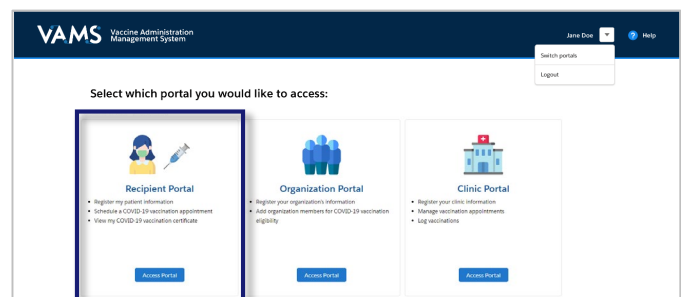
NOTES:

- 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)*

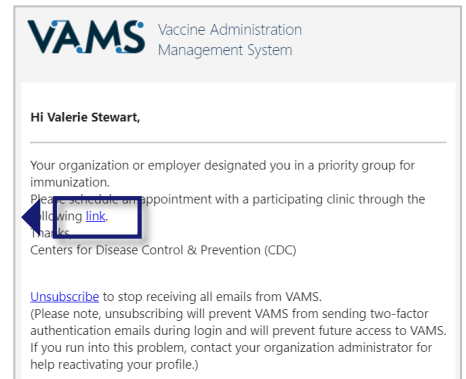
4. Clinic Staff Members Register as COVID-19 Recipients in VAMS and Become Multi-Portal Users

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**.

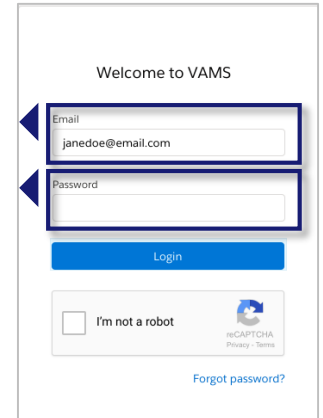
- Open your recipient registration **email notification** and click the **link** to register your account.

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**.

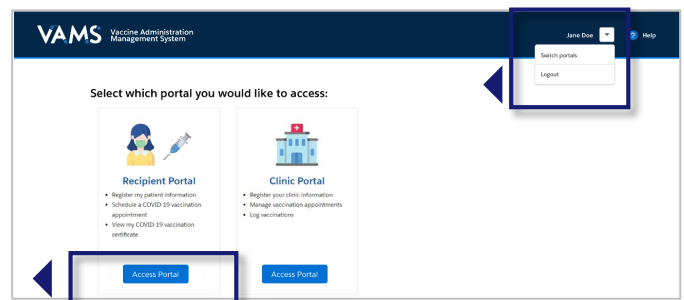
NOTE: You must use the same email address and password to log into VAMS for every user role you hold.



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**.





VAMS Downtime Procedures

VAMS is occasionally taken down for scheduled system maintenance. All VAMS functions will be 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>.
- 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.
 - Users assigned the healthcare professional role can backdate vaccinations using the Record Past Vaccination(s) button on the Manage Appointments tab. They can record vaccinations they administered or can record them on behalf of another healthcare professional. You can learn more about this functionality in the VAMS Healthcare Professional Standard and Mobile Clinic User Manual.

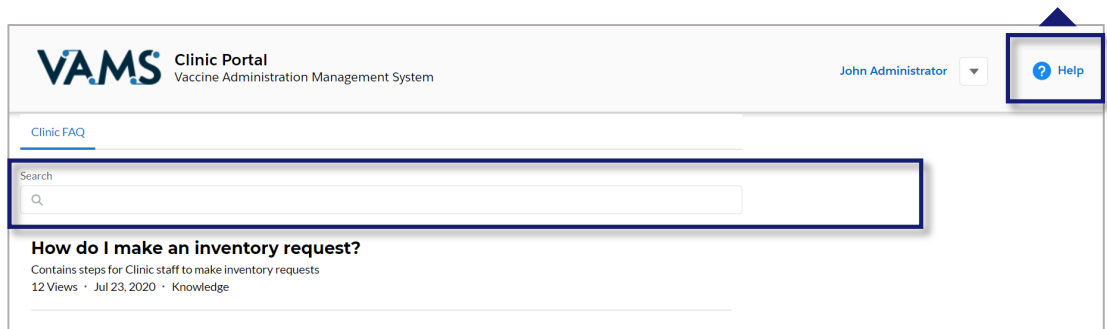
Access Support

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

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.
Closed POD (point of dispensing)	Closed PODs allow clinics to be open and available for scheduling only to recipients from the organizations they have designated as limited service groups in VAMS. A clinic can have up to 10 organizations active as limited service groups as part of their closed POD.
Member	An individual being added in VAMS to receive a COVID-19 vaccine.
Mobile Clinic	A clinic that moves to multiple locations for vaccination (e.g., a mobile clinic bus or van).
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.
Pop-Up Clinic	A temporary clinic that has one permanent location (e.g., a clinic set up in a school gym that will stay at that location while it is open).
Third-Party Clinic	Clinics responsible for both adding and managing recipient records as well as administering and tracking recipients in VAMS.
Treatment Station	Vaccination stations are currently called “treatment stations” in VAMS and therefore in parts of this user manual.
Unit of Sale (UoS)	The packaging in which the vaccine vials are delivered.
Unit of Use (UoU)	The vaccine vial.
Vaccination Clinic	A clinic administering COVID-19 vaccine (sometimes referred to as a “vaccine clinic” in VAMS and this user manual).
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.