



Vaccine Administration  
Management System

# User Manual

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## Standard & Mobile Clinic Administrator

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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 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 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 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 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 the clinic's success.

As a **clinic administrator**, you will use VAMS to define and manage your clinic's information (e.g., physical and shipping address[es]), 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 the clinic POC, you will skip step 2 in Section 1 of this user manual.

The table below illustrates the activities that only you, as the clinic administrator, can perform in VAMS.

Activities	Clinic Administrator	Inventory Manager (optional)	Front Desk	Healthcare Professional
Serve as the clinic point of contact (POC) for your jurisdiction (Typically, the clinic administrator serves as the clinic POC.)	✓			
Manage clinic information (e.g., physical address)	✓			
Set and manage clinic schedule	✓			
Manage clinic's COVID-19 vaccine inventory	✓	✓		
Manage (add, edit, remove) VAMS clinic users	✓			
Check in vaccine recipients			✓	
Create walk-in recipient appointments			✓	
Cancel recipient appointments			✓	✓
Administer vaccine to recipients				✓
View recipients' next-dose eligibility dates				✓

**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, filling the inventory manager role is not required, but is recommended.

**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 contact your jurisdiction POC to request 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 activities to provide context on how you will work with other users in the system.

## How to Use this User Manual

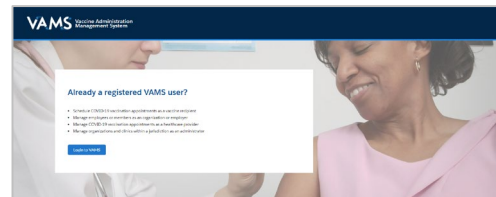
Throughout this user manual, you will see the following components.

Component	Description
<b>NOTE:</b>	Notes are need-to-know pieces of information you should be aware of.
<b>Quick Tip:</b>	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”).
<a href="#">Bright blue hyperlinks</a>	Bright blue hyperlinks link to external pages (e.g., <a href="https://vams.cdc.gov/vaccineportal/s">https://vams.cdc.gov/vaccineportal/s</a> ).
<a href="#">Gray hyperlinks</a>	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).
<a href="#">Dark blue hyperlinks</a>	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.

# 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>) and log in with your user name and password (see [Section 1, Step 1](#) for how to activate your VAMS account).



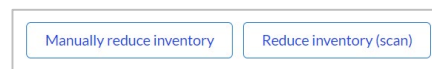
The components listed below are in VAMS to help you navigate the system.

## Header/Banner



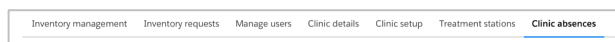
The **VAMS logo** takes you to your portal's home page. The **Help** link takes you to a list of frequently asked questions (FAQs) that will help you navigate the system. Click the drop-down arrow next to your name in the top right corner of the page to **log out** of the system or to navigate to a different portal (if applicable).

## Buttons



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

## Tabs



Click tabs on a page to move between pages or page sections. The tab you are currently viewing will be underlined and bolded. Tabs not being viewed will be grayed out.

## Tables

Tables allow users to sort or filter information previously entered in VAMS. You can view entry details by clicking the links in each row.

Operating hours			
3 items - Sorted by Name - Filtered by my accounts			
Day of week	Start time	End time	
1 Monday	8:00 AM	12:00 PM	
2 Monday	3:00 PM	5:00 PM	

## 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>.

# 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	
<input type="checkbox"/> <b>Step 1: <a href="#">Activate Your User Account</a></b> in VAMS. Follow the prompts in your registration email from vams@cdc.gov to complete this step.	<ul style="list-style-type: none"> <li>• Access to the internet</li> <li>• Access to your email account</li> <li>• Registration email from <b>vams@cdc.gov</b></li> </ul>	
<input type="checkbox"/> <b>Step 2: <a href="#">Register Your Clinic in VAMS</a></b> (clinic POC only). If you are the 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.	<ul style="list-style-type: none"> <li>• Clinic name</li> <li>• Clinic type (types defined on <a href="#">page 8</a>)</li> <li>• Primary address</li> <li>• Shipping address</li> <li>• Phone number</li> <li>• Clinic Facility ID</li> <li>• Provider PIN</li> <li>• Parent Org ID (if required by your jurisdiction)</li> </ul>	<b>Quick Tip:</b> 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.
<input type="checkbox"/> <b>Step 3: <a href="#">Set Up Your Clinic's Schedule in VAMS</a></b> . This step includes selecting an appointment duration time, setting clinic operating hours, and adding treatment stations and their operating hours.	<ul style="list-style-type: none"> <li>• Selected appointment duration at your clinic (10, 15, 20, or 30 minutes)</li> <li>• Clinic start and end date and time zone</li> <li>• Clinic operating hours (days and hours your clinic will be open)</li> <li>• 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.</li> </ul> <p><b>NOTE:</b> You must set up at least one station to make appointments available.</p> <ul style="list-style-type: none"> <li>• Operating hours for each treatment station (hours each station will be staffed on each day)</li> </ul>	
<input type="checkbox"/> <b>Step 4: <a href="#">Add Clinic Staff as VAMS Users</a></b> so your clinic staff receives a registration email to activate their own VAMS account.	<ul style="list-style-type: none"> <li>• Familiarity with the VAMS Roles and Activity Matrix on <a href="#">page 15</a></li> <li>• Email address for each user you plan to add</li> </ul>	

# □ Step 1: Activate Your User Account

## What you'll need to complete this step

- Access to the internet
- Access to your email account
- Registration email from **vams@cdc.gov**

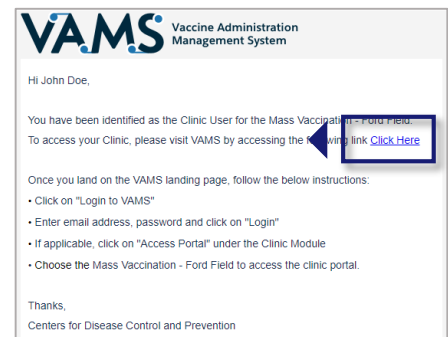
You must activate an account in VAMS to use the system. After your jurisdiction's POC enters your name and email address in VAMS, you will receive an email with a VAMS registration link.

- 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's 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**.

The screenshot shows the 'Hi, John. Welcome to VAMS' page. It asks the user to 'Please create your Account to Access the Clinic Module'. The 'Your Username' field is prepopulated with 'vamsuser1500@hotmail.com'. Below it, it lists password requirements: 'Your password must be at least 8 characters long and include at least 3 of the following categories: 1 uppercase character, 1 lowercase character, 1 number, 1 special character'. There are fields for 'Create Password' and 'Verify Password'. A 'Security Alert' banner is visible. At the bottom, there is a checkbox 'By Checking this Box, I Agree to the specified terms.' and a red box around the 'Create Account' button.

**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.

The screenshot shows the 'Two factor authentication' page. It displays a 'Temporary code sent to' field with a value '\*\*\*\*\*@gmail.com'. Below it, it says 'This code is valid for the next 24 hours. If you did not receive the code within the next 5 minutes, please try again or visit the link page for support.' There is a 'Code' input field and a 'Verify' button.

Upon logging into VAMS, you will immediately be taken to the Vaccination Clinic Registration page if you are the clinic 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** - utilizes all four clinic user roles, searchable by recipients in VAMS

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

**Mobile** - utilizes 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 utilize 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:**
  - The clinic's shipping address can be different from the physical address if you prefer vaccine to be shipped to another location.
  - 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 end date and time zone
- Clinic operating hours (hours and days will your clinic will be open)
- Number of treatment stations the clinic will staff
- Operating hours for each treatment station (hours each station will be staffed on each day)

**NOTE:** You must set up at least one station to make appointments available.

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

- Set appointment duration
- Set operating hours for your clinic
- Add treatment station(s) and set their operating hours

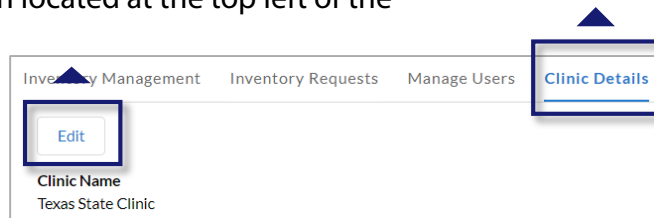
*All steps must be completed for your clinic to appear in search results.*

### 3a. Set Appointment Duration

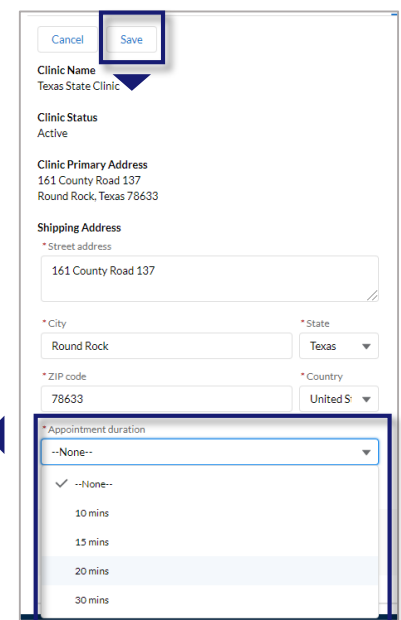
The appointment duration selection applies to all treatment stations within the clinic and will determine how many appointments are available at each treatment station each day of operation. You can set the duration of appointments for your clinic in VAMS for 10, 15, 20, or 30 minutes.

**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 page.



- **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.



## ❑ 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 what hours 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 the clinic to be open.
- You can enter operating hours in 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).
- Operating hours can vary each day (e.g., hours from 8 AM–5 PM on Monday and 8 AM–12 PM on Tuesday).

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

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

➤ Click the **Edit** button in the upper right corner of the **clinic location details** page.

➤ In the **Edit Clinic Location** pop-up window, make sure the **Available for Scheduling** checkbox is checked if you are ready to start scheduling appointments. If you are not ready to schedule appointments, uncheck this box. **Your clinic will not be visible to recipients unless this box is checked.**

➤ Confirm the **time zone** is correct for your clinic's physical location or make any necessary changes.

➤ The clinic start date will auto-populate to today's date but can be edited. **You must enter an end date for your clinic.** This will determine how far in advance appointments can be scheduled. **This must be done for your clinic to be visible to recipients in VAMS.**

➤ Click **Save**. If you don't see your updates reflected on the clinic location details page, **refresh the page.**

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

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

- Click the **Setup Operating Name and Operation Hours** link located under Clinic 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.

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

- In the pop-up window, select the **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.
- To **edit or delete time slots in the clinic's operating hours**, see Manage Clinic Schedule on [page 22](#) in Section 2.

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

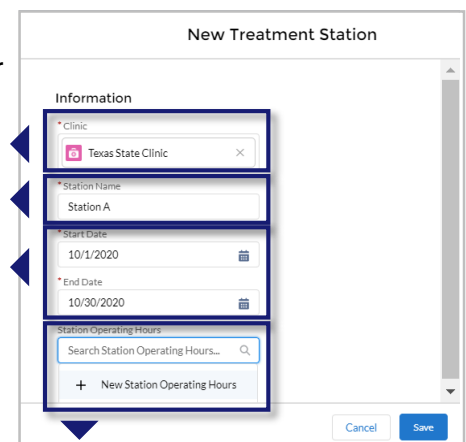
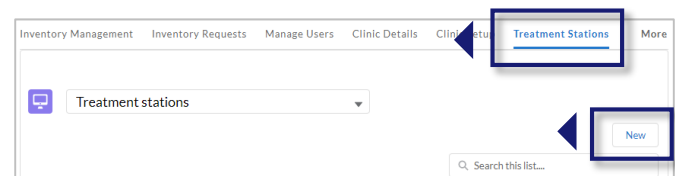
### 3c. Add Treatment Station(s) and Set Their Operating Hours

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 appointment availability 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 the clinic's operating hours 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 the 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.

### Set Treatment Station Operating Hours

**NOTE:** If you want your treatment station hours to default to the 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 the clinic's operating hours.

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

Treatment Station  
Station A

**STATION DETAILS** STATION ABSENCES

Clinic  
[Bloomfield Clinic](#)

Station Name  
Station A

Start Date  
10/14/2020

End Date  
10/30/2020

Station Operating Hours  
[Station A operating hours](#)

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

Station Operating Hours  
Station A operating hours

STATION OPERATING HOURS NAME

**STATION OPERATING HOURS**

Station Operating Time Slots (0)

**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**.

New Station Operating Time Slots

\* Station Operating Hours  
[Station A operating hours](#)

\* Day of week  
--None--

\* Start Time

\* End Time

**Save & New** **Save**

- To **rename treatment station hours**, or to **edit or delete a time slot in a treatment station's operating hours**, see Manage Clinic Schedule on [page 24](#) in Section 2.

## □ 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.
- 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. Since the clinic administrator can manage inventory in VAMS, filling the inventory manager role is not required, but is recommended.

---

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 Roles and Activities Matrix on [page 3](#), the four VAMS clinic user roles should generally align with each user's existing scope of responsibility at the 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** 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 is **strictly prohibited**.



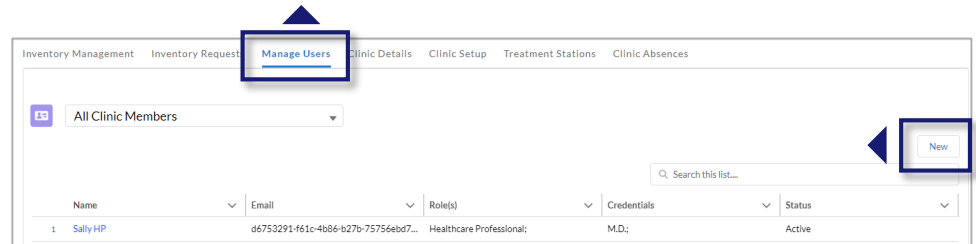
## Step 4: Add Clinic Staff as VAMS Users (continued)

VAMS Role and Activity Matrix				
Standard and Mobile Clinic User Role				
Activity in VAMS	Clinic Administrator	Inventory Manager (optional)	Healthcare Professional	Front Desk
Serve as a clinic point of contact for your jurisdiction. <i>(Typically, the clinic administrator also serves as the clinic POC.)</i>	✓			
Manage clinic information (e.g., physical address)	✓			
Set and manage clinic schedule	✓			
Manage (add, edit, remove) VAMS users	✓			
Place COVID-19 inventory requests	✓	✓		
Log COVID-19 vaccine inventory when received	✓	✓		
Reduce COVID-19 vaccine inventory	✓	✓		
Monitor clinic's COVID-19 vaccine inventory levels to match appointments scheduled	✓	✓		
View and export Inventory-Vaccine Level report	✓		✓	
Check in recipients				✓
Create walk-in recipient appointments				✓
Cancel recipient appointments			✓	✓
Confirm recipient identity			✓	✓
Access and review recipient record (name, date of birth [DOB], medical history, known allergies, etc.); add notes to record			✓	
Log vaccination (vaccine information, outcome, and waste if applicable)			✓	
View next-dose eligibility dates			✓	
View and export Vaccination Administration and Scheduled Appointment reports			✓	

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

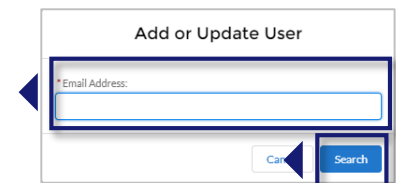
➤ To add clinic staff as VAMS users, click the **Manage Users** tab on your Clinic Portal home page.

➤ 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**, and click **Search**.

**NOTE:** This feature searches to see if the user's email address has already been activated in VAMS. For detailed information about adding clinic staff members who are already VAMS users for other clinics, see Multi-Clinic Users on [page 24](#) in Section 3.



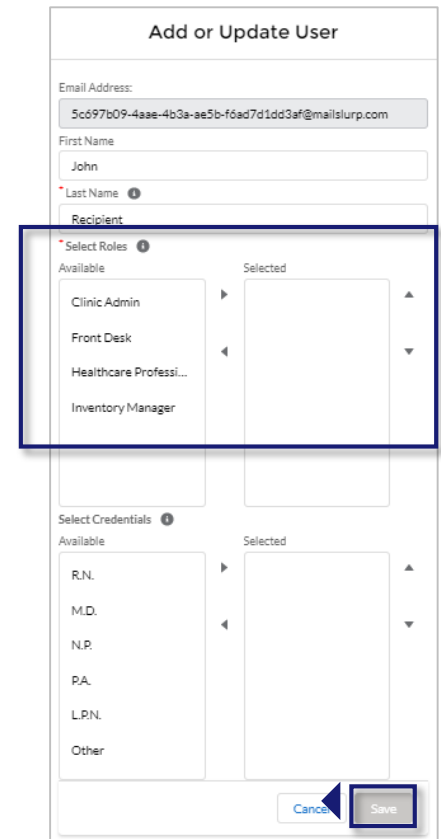
➤ In the next pop-up window, enter the user's **information** and **select the role(s)** you want them to perform in VAMS.

**NOTE:** Prior to adding additional roles to a user's record in VAMS, refer to the Activities 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

### Clinic Management 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, and user access.

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

Manage Clinic Info

Manage clinic physical and shipping address(es); update your clinic's Facility ID, Provider PIN, and Parent Org ID; or deactivate your clinic.

Manage Clinic Schedule

Manage clinic start and end dates; change operating hours or appointment duration; add or remove treatment stations; create clinic and treatment station absences; and check or uncheck the 'Available for scheduling?' box to make your clinic available or unavailable for recipients to schedule appointments in VAMS.

Manage Clinic Users

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

# Manage Clinic Information

Access and edit information such as your clinic's physical and shipping address(es); update your clinic's Facility ID, Provider PIN, and Parent Org ID; or deactivate your clinic.

## Clinic Details Tab

In this tab you can:

- Update the **shipping** address for inventory.
- Change your clinic's appointment duration.
- Update your clinic's Facility ID, Provider PIN, Parent Org ID,
- Deactivate or reactivate your clinic in VAMS.

**To edit any information listed in the first 3 bullets 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 the clinic's inventory.
- Click **Deactivate Clinic** to continue. If you change your mind, click **Cancel**. This closes the pop-up window and redirects you to the Account page.

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

- Send an email to the jurisdiction POC informing them the clinic is deactivated.
- Cancel all recipient appointments booked at the clinic.
- Send a cancellation email to recipients whose appointments are cancelled.
- Remove the 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](#).



# Manage Clinic Information *(continued)*

## Clinic Setup Tab

In this tab you can access your clinic's location record and:

- Check or uncheck the 'Available for scheduling?' box to make your clinic available or unavailable for recipients to schedule appointments.
- Update your clinic's **physical** address.
- Update your clinic's time zone.
- Change your clinic's start or end dates.

**To edit any of the information listed above:**

- Click the **Clinic Setup** tab, then click your **clinic's name** in the Clinic Location table.
- Click the **Edit** button in the upper right corner of the **Clinic Location** page.

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

# Manage Clinic Schedule

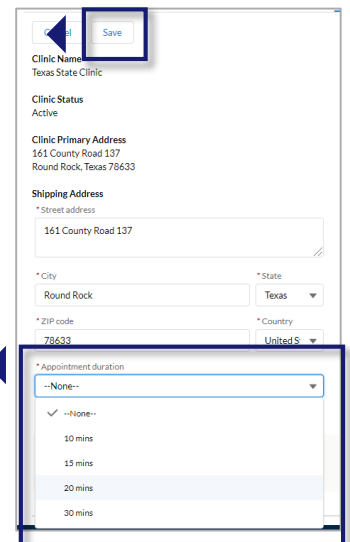
The following settings and processes affect your clinic's schedule and if/how it appears to recipients in VAMS. This section of the user manual is here to show you how to make updates to your schedule.

- Change appointment duration.
- Check or uncheck the 'Available for scheduling?' box to make your clinic available or unavailable for recipients to schedule appointments in VAMS.
- Change your clinic's operating hours by editing or deleting time slots.
- Add or delete treatment stations.
- Change treatment station operating hours.
- Create clinic and treatment station absences.

**NOTE:** Edits to your clinic's schedule could impact recipient appointments scheduled at your clinic.

## Edit Appointment Duration

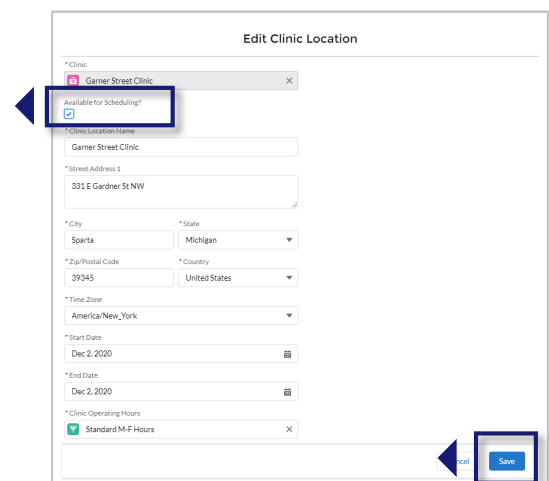
- Click the **Clinic Details** tab, then click the **Edit** button above your clinic's name to edit the appointment duration. Options include 10-, 15-, 20-, or 30-minute increments.
- Click **Save**.



The screenshot shows the 'Edit Clinic' form for 'Garner Street Clinic'. The 'Appointment duration' dropdown menu is open, showing options: --None--, 10 mins, 15 mins, 20 mins, and 30 mins. The 'Save' button is highlighted in the top right corner.

## Edit Available for scheduling? Box

- Click the **Clinic Setup** tab, then click your **clinic's name** in the Clinic Location table.
- Click the **Edit** button in the upper right corner of the **Clinic Location** page.
- Check or uncheck the **Available for scheduling?** box.
- Click **Save**.



The screenshot shows the 'Edit Clinic Location' form for 'Garner Street Clinic'. The 'Available for scheduling?' checkbox is checked. The 'Save' button is highlighted in the bottom right corner.



# Manage Clinic Schedule *(continued)*

## Edit or Delete Clinic Operating Hour Time Slots

You can edit or delete time slots in your clinic operating hours from the **Clinic Setup** page.

**NOTE: Editing or deleting the clinic's operating hours will impact recipient appointments scheduled during those times.** Once you click Save, a pop-up window will appear, alerting you that editing or deleting the time slots will cancel appointments scheduled during that time. **Editing or deleting operating hours will also impact the number of time slots available for recipients who want to schedule an appointment at your clinic.**

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

Clinic Location Name	Address	Start Date	End Date	Status
1 Training Team Clinic - Jenna	191 Peachtree Street NE Atlanta, Ge...	09/23/2020	01/31/2021	Active

- Click the **name of your clinic's hours** in the Clinic Operating Hours field.

VAMS Clinic Portal  
Vaccine Administration Management System

Clinic Location  
Training Team Clinic - Jenna

Clinic  
Training Team Clinic - Jenna

Available for Scheduling?  
☒

Clinic Location Name  
Training Team Clinic - Jenna

Street Address 1  
191 Peachtree Street NE

City  
Atlanta

State  
Georgia

Zip/Postal Code  
30303

Country  
United States

Time Zone  
America/Chicago

Start Date  
9/23/2020

End Date  
1/31/2021

Clinic Operating Hours  
Clinic hours

- On the next screen, click the **Operating Hours** tab.
- Click the **Slot #** of the time slot you want to edit or delete, and then click the edit or delete button in the top right corner of the page.

Clinic Operating Hours  
Bloomfield Clinic Operating Hours

OPERATING HOURS NAME  
OPERATING HOURS

Clinic Operating Time Slots (2)

Slot #	Day of week	Start Time	End Time
COTS-00124	Tuesday	10:30:00 AM	1:45:00 PM
COTS-00126	Wednesday	9:00:00 AM	3:00:00 PM

View All

- In the pop-up window, edit the hours and click **Save**.

Edit Clinic Operating Time Slots

\* Clinic Operating Hours  
Clinic hours

\* Day of week  
Tuesday

\* Start Time  
8:00 AM

\* End Time  
5:00 PM

Cancel Save



# Manage Clinic Schedule *(continued)*

## Edit or Delete Treatment Stations

You can edit a treatment station's name, start and end date, or delete a treatment station from the **Treatment Stations** page.

**NOTE:** Making edits to or deleting your clinic's treatment stations will impact recipient appointments scheduled during those treatment stations' operating hours. Once you click Save, a pop-up window will appear alerting you that editing or deleting treatment stations will cancel appointments scheduled during those treatment stations' operating hours. Deleting or editing operating hours will also impact the number of time slots available for recipients who want to schedule an appointment at your clinic.

- Click the **treatment station** in the Treatment Stations table.

Treatment Station	Start Date	End Date
1 Station E	Oct 14, 2020	Oct 23, 2020
2 Station D	Oct 14, 2020	Oct 24, 2020

- Click the **Edit** or **Delete** button in the upper right corner of the screen.
- Make the desired edits, then click **Save**. Or click **Delete** if you want to delete that treatment station.

**Treatment Station Station D**

[Edit](#) [Delete](#)

**STATION DETAILS** **STATION ABSENCES**

Clinic  
[Bloomfield Clinic](#)

Station Name  
Station D

Start Date  
10/14/2020

End Date  
10/24/2020

Station Operating Hours  
[Station D Operating Hours](#)

- As mentioned above, after you click Save or Delete, a pop-up window will appear with a warning that the update will cancel appointments scheduled during that treatment station's operating hours. Click **Delete** to confirm deletion or click **Cancel** to cancel the action.

**Warning**

This update will cancel scheduled appointments and Recipients will be asked to reschedule.

[Cancel](#) [Delete](#)





# Manage Clinic Schedule *(continued)*

## Edit or Delete Treatment Station Operating Hours and Time Slots

You can edit the name of a treatment station's operating hours, or edit or delete its operating hours from the **Treatment Stations** page.

To **rename** a treatment station's operating hours:

- Click the **treatment station** in the Treatment Stations table *(shown on previous page)*.

Treatment Station  
Station 2

STATION DETAILS STATION ABSENCES

Clinic  
[Freeland Clinic](#)

Station Name  
Station 2

Start Date  
12/11/2020

End Date  
1/29/2021

Station Operating Hours  
[Monday Hours](#)

- Click the **name** of the operating hours on the Station Details page.

- Click the **pencil icon** to rename the treatment station's operating hours, edit the name, then click **Save**.

Station Operating Hours  
Monday Hours

STATION OPERATING HOURS NAME STATION OPERATING HOURS

Station Operating Hours Name  
Monday Hours

To **edit** time slots within a treatment station's operating hours:

- Click the **Station Operation Hours** tab.
- Click the **Slot #** for the time slot you want to edit.

Station Operating Hours  
Monday Hours

STATION OPERATING HOURS NAME STATION OPERATING HOURS

Station Operating Time Slots (1)

Slot #	Day of week	Start Time	End Time
<a href="#">SOTS-00538</a>	Monday	9:00:00 AM	4:00:00 PM

[View All](#)

- Click **Edit** or **Delete** in the upper right corner of the Station Operating Time Slots page.

- Make your edits in the Edit Station Operating Time Slots pop-up window, then click **Save**.

Edit Station Operating Time Slots

\* Station Operating Hours  
Monday Hours

\* Day of week  
Monday

\* Start Time  
9:00 AM

\* End Time  
4:00 PM

[Save](#)

To **delete** a treatment station's set of operating hours:

- Click the **Station Operation Hours** tab.
- Click **Delete** in the upper right corner of the Station Operating Hours page.

Station Operating Hours  
Monday Hours

STATION OPERATING HOURS NAME STATION OPERATING HOURS

Station Operating Time Slots (1)

Slot #	Day of week	Start Time	End Time
<a href="#">SOTS-00538</a>	Monday	9:00:00 AM	4:00:00 PM

[View All](#)

[Delete](#)



# Manage Clinic Schedule *(continued)*

## Create a Clinic Absence

If you need to temporarily close your clinic, you can create a clinic absence to **put a temporary pause on your normally scheduled operating hours**. During a clinic absence, the system will show your clinic as closed and appointments will not be available to recipients.

**NOTE:** If you create a clinic absence during a time when recipients have already scheduled appointments, the appointments will be cancelled, and recipients will receive a cancellation notification via their preferred communication method.

- Click the **Clinic Absences** tab to create an absence.
- Click the **New** button in the upper right corner.

- In the pop-up window that appears, select your clinic's name in the Clinic field.
- Create a **name** and **reason** for the absence.
- Select **start and end dates**.
- Click **Save**.

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

**NOTE:** Updates to the clinic schedule may not immediately appear in the recipient portal where recipients search for clinics and schedule appointments.

**For example:** If you edit the clinic's operating hours on Monday morning to show that the clinic is closed on Friday, recipients may not see updated clinic hours until late Monday evening or Tuesday morning.



# Manage Clinic Schedule *(continued)*

## Create a Treatment Station Absence

In addition to a clinic absence, you can **create a treatment station absence** if you need to temporarily shut down one of the stations because of insufficient staff or inventory. **If you create a clinic absence, you do not have to create treatment station absences for the same time period.** The clinic absence will override any operating hours associated with the treatment stations.

- To create a **treatment station absence**, click the **Treatment Stations** tab to view a list of the stations you have created.

- Click the **station name** in the Treatment Stations table to access that station's details and absences.

- Click the **Station Absences** tab.

- Click **New** in the Station Absences box.

- Click in the **Station** box in the pop-up window. Your station's name should appear in the drop-down for you to select or you can search for it if it doesn't appear.
- Add a reason for the absence, start date and time, and end date and time, and click **Save**.
- A warning will pop up that updating the treatment station absence will cancel scheduled appointments. Click **OK**.

- All treatment station absences will appear in the Station Absences table under the **Station Absences** tab for each treatment station. Here you can **edit or delete** them through the drop-down arrow to the right of an absence's details.



# Manage VAMS Clinic Users

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

## Edit or Remove a VAMS Clinic User

You can edit a VAMS user's record or remove them from the system from the **Manage Users** page.

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

Inventory Management   Inventory Requests <b>Manage Users</b> Clinic Details   Clinic Setup   Treatment Stations   Clinic Absences					
All Clinic Members					
Search this list...					
Name	Email	Role(s)	Credentials	Status	
John Administrator	889b68a4-671c-400c-997c-7b9d81af168f@mailslurp.com	Clinic Admin		Active	
John Administrator	7a2b3569-9b64-4b64-4b64-4b64@mailslurp.com	Front Desk	R.N.	Active	

- 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.

Contact

Mr. John Administrator

Edit

Remove

Email

889b68a4-671c-400c-997c-7b9d81af168f@mailslurp.com

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

Edit Contact

Manage User Owner

Pradeep Ravi

Phone

404442230

Cell Phone

First Name

John

Middle Name

Last Name

Administrator

Suffix

Name

Training Team Clinic - Jenna

Email

889b68a4-671c-400c-997c-7b9d81af168f@mailslurp.com

Title

Address Information

Mailing Address

Mailing Street

Mailing City

Mailing State/Province

Mailing Zip/Postal Code

Mailing Country

Cancel

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 on [page 49](#) in Section 5: Troubleshooting and Support.

Remove

Are you sure you want to remove John Administrator as a User within this clinic: Training Team Clinic - Jenna?

\* Answer:

Yes

No

Next



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

**For example:** If you select the front desk 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.

## Section 3

# COVID-19 Vaccine Inventory Management

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

*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.

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 page to monitor inventory levels and view snapshots of available and booked appointments.

Inventory Vaccine Level  
Report

View and export the Inventory-Vaccine Level report to review your clinic's current inventory sorted by categories, including total manufacturers, total doses remaining, and doses remaining by manufacturer and product.



# Place COVID-19 Vaccine Inventory Requests

## What you'll need to place inventory requests

- Desired product type, number of doses

Managing your clinic's vaccine inventory will primarily be the inventory manager's role, but as the clinic administrator, you also have access to manage vaccine inventory in VAMS. You will submit 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 the recipients with scheduled appointments.

**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** page in VAMS.

The Inventory Requests page 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**.

- From the Clinic Portal home page, click the **Inventory Requests** tab.

	Inventory Reque...	Clinic	Product	Date Requested	Date Required By	Doses Requested	Status
1	IRN-0009	Dignity Health - California Hospital Medical Center	COVID-B	8/10/2020	8/12/2020	10	Submitted
2	IRN-0010	Dignity Health - California Hospital Medical Center	COVID-A1	8/10/2020	8/12/2020	10	Submitted

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



# Place COVID-19 Vaccine Inventory Requests

(continued)

- The **Create Site Inventory Request** pop-up window includes several required fields (noted by a red asterisk).

- Click in the **Product** field and select the vaccine product from the drop-down or type in the name of a product and click the Show All Results to be taken to the Product pop-up window.

- In the **Product** pop-up window, **click the number** in the Vaccine Name column of the table to select the vaccine product you want to request.

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

- Enter the **number of vaccine doses** you are requesting.
- Your clinic's name will auto-populate in the clinic field. If you wish to change the clinic selection, click the "X" in the field to select from a list of clinics to which you are assigned.
- Enter the **date** of your inventory request.
- Enter the **date** by which you **want to receive** the doses you are requesting.

- Click **Save** to save your inventory request. VAMS will send your request to your jurisdiction POC.

**Create Site Inventory Request**

\* Product  
Search Vaccines...

\* Date Requested

\* Doses Requested

\* Date Required By

\* Clinic  
MinuteClinic

\* Status  
Submitted

**Product**

Product  
COVID

**Vaccines**  
4 Results • Sorted by Relevance ▼

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

**Create Site Inventory Request**

\* Product  
Merck

\* Date Requested

\* Doses Requested

\* Date Required By

\* Clinic  
MinuteClinic

\* Status  
Submitted





# Track COVID-19 Vaccine Inventory Requests

After your inventory request is submitted, a record of that request appears on the **Inventory Requests** page. 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 Management		Inventory Requests					
		COVID-19 inventory requests					
		3 items • Sorted by Inventory Request Number • Filtered by all site inventory requests • Updated 2 minutes ago					
Inventory Request Number	Clinic	Product	Date Requested	Date Required By	Doses Requested	Status	
1	IRN-0009	Dignity Health - California Hospital Medical Center	COVID-B	8/10/2020	8/12/2020	10	Submitted
	IRN-0010	Dignity Health - California Hospital Medical Center	COVID-A1	8/10/2020	8/12/2020	10	Submitted

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.

Click Follow if you want to be notified via email if you receive a message about this inventory request.

**Site Inventory Request IRN-0076**

Status: Submitted

Inventory Request Number: IRN-0076

**Clinic Details**

Clinic: CVS Burlington Pharmacy

Clinic Address: 36 Church St, Burlington, Vermont, 05401, USA

Clinic Phone: 5555555555

Requestor Email: test1237@test1237.com

**Request Details**

Product: COVID-B

Doses Requested: 20

Date Requested: 8/28/2020

**Post**

Share an update...

**State User 2 (Customer)** 1m ago

We are only able to fulfill half of the requested vaccines.

**Mike Inventory Mgr (Customer)** a few seconds ago

That is fine. We will plan accordingly.

Like Comment 1 comment

Write a comment...

## 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.



# Log COVID-19 Vaccine Inventory

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

## 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.

## Log Vaccine Inventory Manually

- On the Inventory Management page, click the **Manually Log Inventory** button.

- Select the **manufacturer** and **product** from the drop-down menus. Enter the remaining **vaccine information** required.

### **NOTES:**

- UoU and UoS lot numbers must be an **exact** match, including case.
- It's possible you may enter new inventory that only partially matches an existing entry. If this happens, you will receive an error message. Follow the instructions in the message to invalidate the old record and add remaining inventory to a new record.

- Click **Next**.

- **Review and confirm** the information you entered is correct, then click **Next**.

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



# Log COVID-19 Vaccine Inventory *(continued)*

## Log Vaccine Inventory by Scanning a 2D Barcode

VAMS is compatible with 2D barcode scanners (Bluetooth wireless and those that are not wireless). However, integrated mobile device scanning (i.e., an app that can scan a 2D barcode) will not connect with or automatically transfer information to VAMS. **NOTE:** Current COVID-19 vaccine vials do not have barcodes that can be scanned by 2D barcode scanners, so information will have to be entered manually at this time.

**NOTE:** You **must** scan and log 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.

- On the Clinic Portal home page, below the doses section of the Inventory Management page, click **Scan Inventory**.

The screenshot shows the 'Inventory Management' section of the Clinic Portal. It includes a 'Scheduled Appointments' section with '0 next 28 days' and '0 total'. A 'Total on-hand inventory' section shows '209 doses'. At the bottom right, there is a 'Scan Inventory' button highlighted with a blue box and an arrow.

- 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.

The screenshot shows the 'Scan Inventory' pop-up window. It has a progress bar with four steps: 'Scan UoS', 'UoS Information', 'Scan UoU (vial)', and 'Review'. The 'Scan UoS' step is currently active. Below the progress bar, there is a 'UoS barcode' field with a dropdown menu and a 'Next' button at the bottom right.

- 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**.

The screenshot shows the 'UoS Information' screen within the 'Scan Inventory' pop-up. It displays prepopulated information: 'UoS NDC: 309913-01', 'UoS lot number: B0P03-3', and 'UoS serial number: 1270456789'. There is a field for 'Enter UoU (vials) in UoS' and a 'Next' button at the bottom right.

- **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**.

The screenshot shows the 'Scan UoU (vial)' step within the 'Scan Inventory' pop-up. It displays the 'UoU barcode' field and a 'Next' button at the bottom right.

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

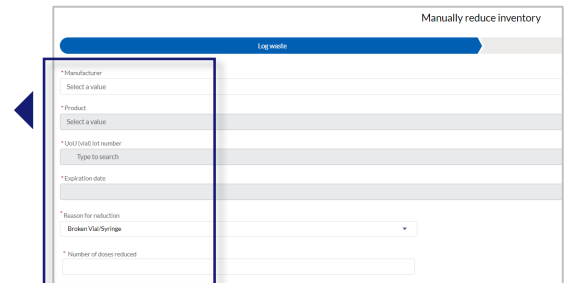
# Reduce Vaccine Inventory

Reduce vaccine inventory manually or via 2D barcode scanner (if available).

Similar to how you log vaccine inventory, you can reduce vaccine inventory in VAMS in **two different ways**: Use a 2D barcode scanner to scan the barcodes on the vaccine vials so the information is automatically entered in the system, or manually enter the information.

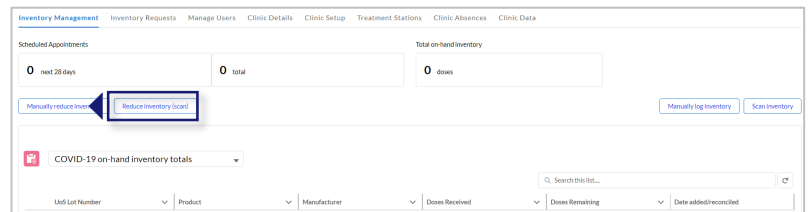
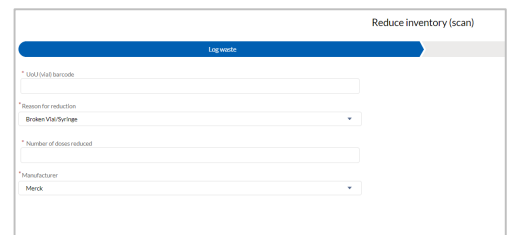
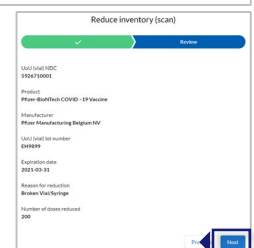
## Reduce Vaccine Inventory Manually

- On the Inventory Management page 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 the **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 page 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 page to monitor inventory levels and view snapshots of available and booked appointments. This page gives you a complete view of important information about your vaccine inventory level.

Inventory Management	Inventory Requests	Manage Users	Clinic Details	Clinic Setup	Treatment Stations	Clinic Absences	Clinic Data
Scheduled Appointments		Total on-hand inventory					
0 next 28 days		0 total		393 doses			

This page 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 page come from the inventory you log and reduce in VAMS as well as what the clinic healthcare professional logs during vaccine administration. The healthcare professional's method of logging inventory and waste is similar to yours. They can either scan a 2D barcode or log the information manually.



# Inventory-Vaccine Level Report

From the Clinic Data page, clinic administrators and healthcare professionals can view and export an Inventory-Vaccine Level report to review your clinic's current inventory and sort it by the following categories:

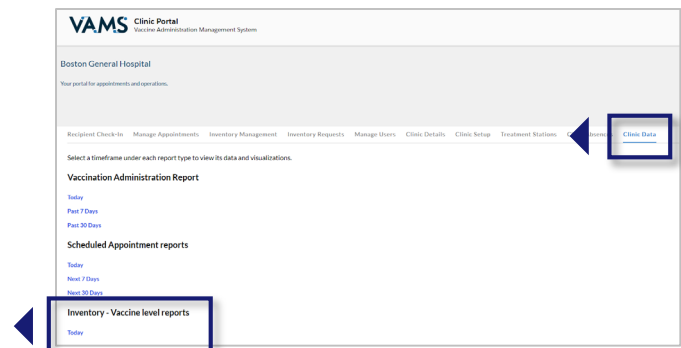
- Total manufacturers
- Total doses remaining
- Doses remaining by manufacturer and product

**NOTE:** As inventory managers do not have access to the Clinic Data tab, they cannot view the Inventory-Vaccine Level Report.

Additional reports on the **Clinic Data** page include:

- **Vaccination Administration** - includes data on vaccines administered at your clinic and is **only viewable by the healthcare professional** because it contains recipient PII and PHI
- **Scheduled Appointment** - includes data on scheduled appointments at your clinic and is **only viewable by the healthcare professional** because it contains recipient PII.

- To access the Inventory-Vaccine Level Report, click the **Clinic Data** tab.
- Click **Today** under Inventory-Vaccine Level Reports.



## Interact with the Data

From the report page, you can interact with the data by **sorting**, **grouping**, and **creating charts** within the report.

### To sort the data

- Click the arrow on the right side of each column header within the report.
- From the drop-down, select how you want to sort the data in the report.

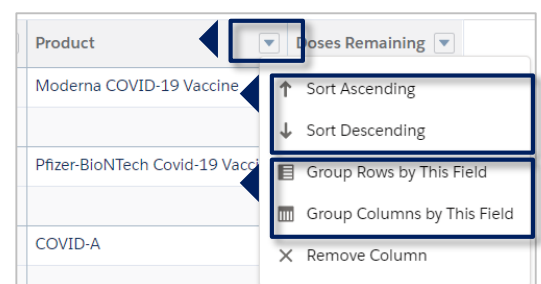
Report: Site Inventory based on Clinic  
**Inventory - Vaccine Level Report**  
Inventory - Vaccine Level report for clinic

Total Records: 3    Total Doses Remaining: 3,206

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

### To group the data

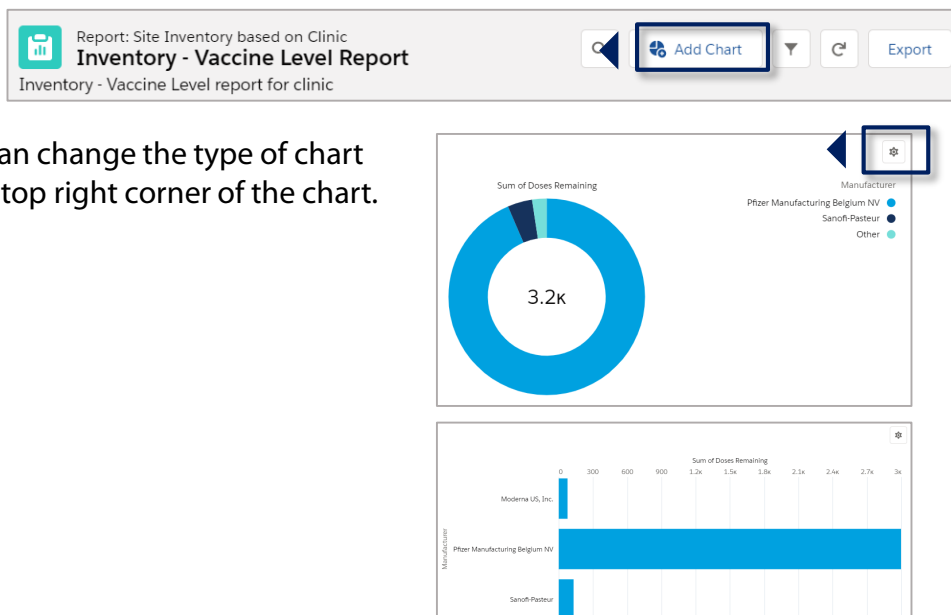
- Click the arrow on the right side of each column header within a report.
- From the drop-down, select **Group Rows by This Field** to group the report by the data in that column.



# Inventory-Vaccine Level Report *(continued)*

## To create a chart of the data

- First, group the report by the data you want to transition into a chart (e.g., doses remaining by manufacturer).
- Click **Add Chart** in the top right corner of the screen.
- After your chart is created, you can change the type of chart by clicking the **gear icon** on the top right corner of the chart.



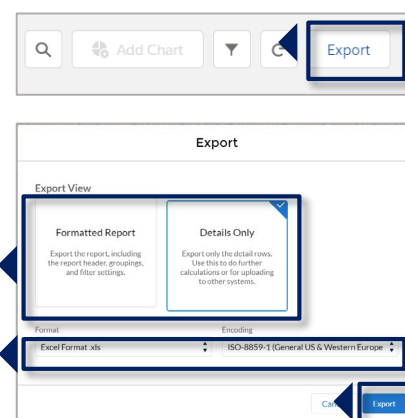
## Export the Data

You can export the Inventory-Vaccine Level Report as a “**Formatted**” or “**Details Only**” report.

- **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. If choosing a Details Only report, you can export data in either Excel (.xlsx or .csv) format.

## To export a report:

- Click **Export** in the top right corner of the screen.
- Select your desired **export view** (Formatted or Details Only) in the Export pop-up window.
- If exporting a Details Only report, select your desired format and encoding option.
- Click **Export**.



# 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](#).

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

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

Mobile Clinic  
Locations/Operating Hours

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

Do you work at **multiple** clinics?

Multi Clinic User

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

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

COVID 19 Vaccine Eligibility  
for Clinic Staff

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





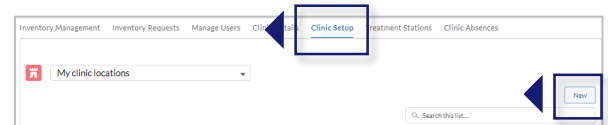
# Mobile Clinic Locations and Operating Hours

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.

You can add new addresses and accompanying operating hours for your mobile clinic's locations after completing the mobile clinic's registration.

## 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 the **New** button in the upper right corner 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 **Save**.

## Set Operating Hours for a New Clinic Location

As you can see in the example, you can select from a set of operating hours you have already created and saved in VAMS or you can create new operating hours for this location.

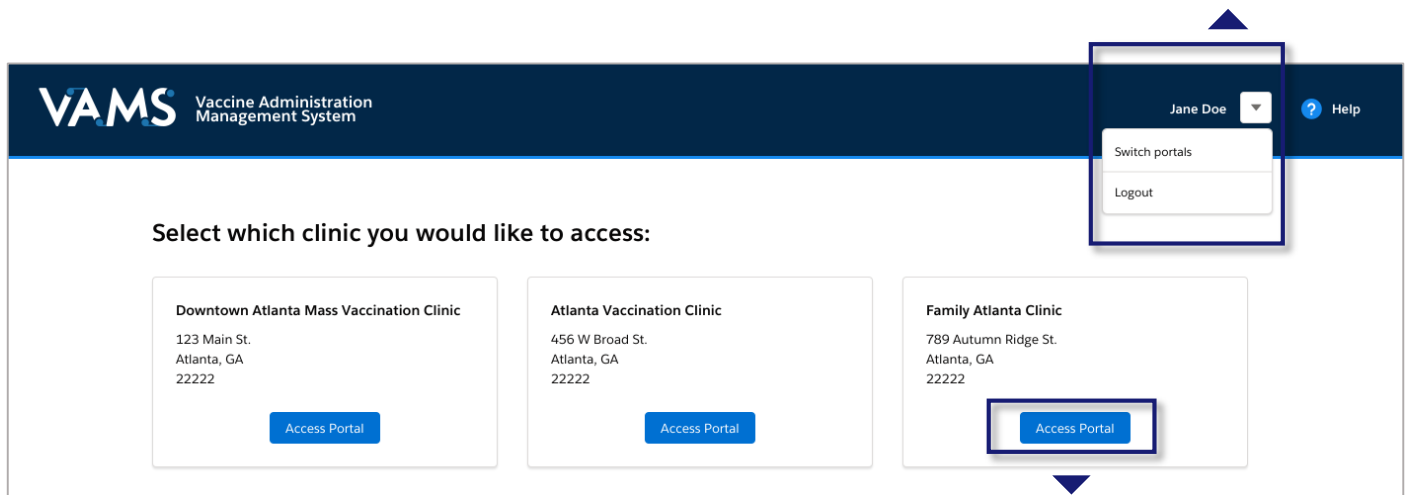
- To create new operating hours, click the option in the drop-down menu and follow the same process outlined in [Step 3: Set Up Clinic Schedule](#) on how to create operating hours.
- When you want this new location to be available for recipients to schedule appointments during the start and end dates you set, click the **Available for Scheduling? checkbox** at the top of the pop-up window. You can edit this at any time by editing the clinic location's details.
- Click **Save**.



# Access Multiple Clinics in VAMS

You may need to perform the same or different user roles at multiple clinics. After the clinic administrator at each clinic adds you as a user for their clinic, you can easily access multiple clinics after logging into VAMS.

- From any page in VAMS, click the **drop-down arrow** next to your name in the upper right corner to access the drop-down menu.
- Click **Switch Portals**.
  - If you have multi-portal access (i.e., you have access to more than one portal—Clinic Portal and Recipient Portal, for example) this will take you to the **portal selection page**. Click the **Clinic Portal** button, then you will see the **clinic selection page** shown below.
  - If you only have multi-clinic access (i.e., you have a clinic role at more than one clinic but do not have access to another portal), clicking **Switch Portals** will take you straight to the **clinic selection page**.



- 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 the clinic's new organization coordinator, including first and last name and the email address they use to log into VAMS.

Once the 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 the 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.

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.

Welcome to VAMS

Email  
janedoe@email.com

Password

Login

☐ I'm not a robot

reCAPTCHA  
Privacy - Terms

[Forgot password?](#)

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.

VAMS Vaccine Administration Management System

Select which portal you would like to access:

**Organization Portal**

- Register your organization's information
- Add organization members for COVID-19 vaccination eligibility

Access Portal

**Clinic Portal**

- Register your clinic information
- Manage vaccine appointments
- Log vaccinations

Access Portal

Top right: Jane Doe [dropdown arrow] Help

Dropdown menu: Switch portals, Logout

**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.



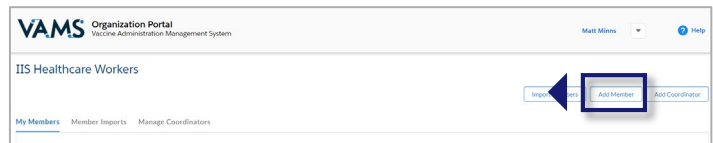
# Enable Recipient Registration in VAMS for Clinic Staff *(continued)*

## 3. Add Clinic Staff as Organization Members

The term organization “member” is used in VAMS to signify any worker, staff member, volunteer, or other personnel being added in VAMS for COVID-19 vaccination.

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 255 characters
- Last Name is limited to 255 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 already exists.”
- After adding a member in VAMS, a **registration email** will be sent to them from vams@cdc.gov with a link for them to register as a COVID-19 vaccine recipient.

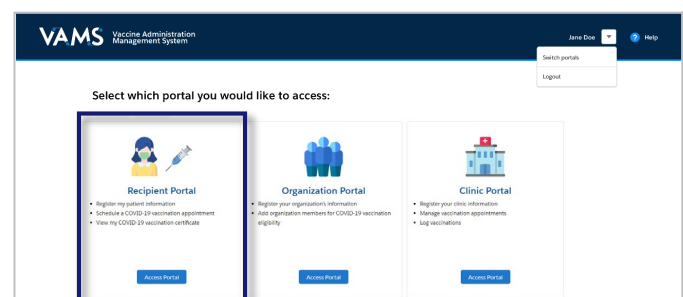
### NOTE:

- You can **resend member registration emails** from the My Members page 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.

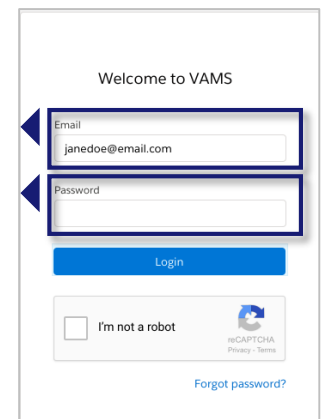
- If you're logged into VAMS, first **log out** by clicking the drop-down arrow next to your name in the upper right corner, then click **Logout**.
- Open your recipient registration **email notification** and click the link to register your account.

**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 login.
- Enter the **same password** you use when logging in as a clinic user. Complete the **reCAPTCHA**, then click **Login**.

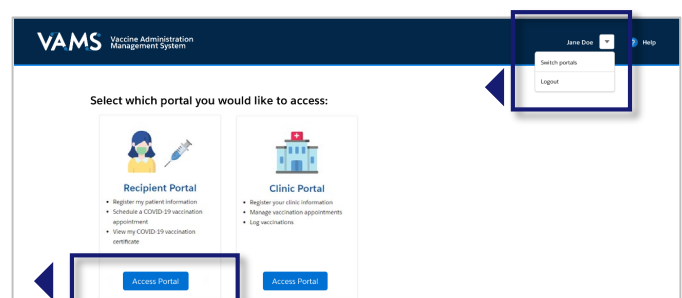
**NOTE:** You must use the same email address and password to log into VAMS for every user role you hold.



After logging in, you will be taken to the **Portal Selection** screen where you now 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**.



# Section 5

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## Access Support

This section will show you how to find answers to common questions clinic staff may have about VAMS.

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

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Access Support

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



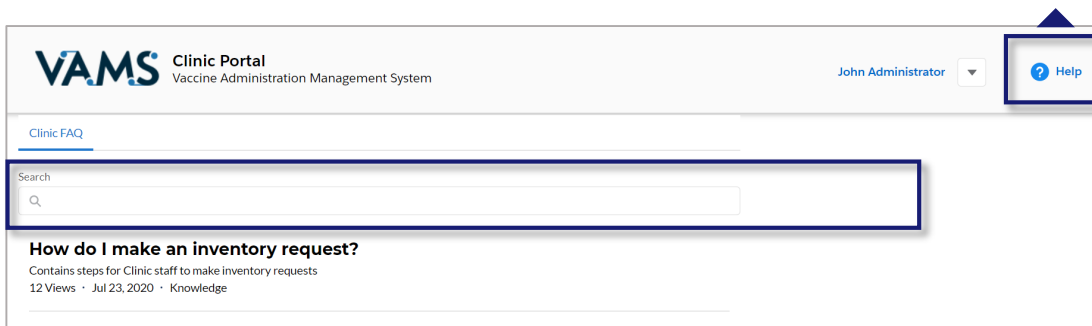
# Access Support

## 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.
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).