

User Manual

Jurisdiction Point of Contact (POC)

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Welcome to VAMS

The Vaccine Administration Management System (VAMS) is an easy-to-use, secure, online tool to manage vaccine administration from the time the vaccine arrives at a clinic to when it is administered to a recipient. VAMS is free for public-health-approved clinics, and can be used on computers, tablets, and other mobile devices. It is not a smartphone app, and no installation or download is required for this web-based platform. It supports operations as well as vaccine inventory and administration data collection and tracking for analysis and reporting.

VAMS Portals | Each of the four portals were designed with end users in mind.



Jurisdiction Portal

Jurisdiction Portal users can use VAMS to:

- Designate specific organizations that serve priority groups (including volunteers) for initial allocation.
- Identify at-risk populations that are a high priority for vaccination.
- Build a database of COVID-19 vaccination clinics in their jurisdiction.
- Access COVID-19 vaccine inventory and administration data for analysis and reporting.



Clinic Portal

Clinic Portal users can use VAMS to:

- Register their clinic location and add clinic staff as users.
- Set up their clinic schedule with ability to cancel, modify, and/or change recipient appointments (*standard and mobile clinics only*).
- Document and track COVID-19 vaccine administration and waste.
- Monitor vaccine inventory levels.
- View clinic-level reports.



Organization Portal

Organization* Portal users can use VAMS to:

- Add priority group members to VAMS to be considered for COVID-19 vaccination.
- Automatically send email notifications to those individuals to register in VAMS and schedule their vaccination appointment(s).



Recipient Portal

Recipient Portal users** who receive vaccine at a standard or mobile clinic and can use VAMS to:

- Register their account online or using a mobile device.
- Locate a clinic and schedule or cancel vaccination appointments.
- Receive notifications about upcoming appointments or documents for the day of vaccination.
- Schedule and track follow-up vaccination appointments (*if applicable*).
- Receive proof of vaccination.

NOTE: Vaccine recipients at third-party clinics will not use VAMS at all.

*"Organization" refers to any institution, association, company, or other group that identifies and adds members (individuals eligible for COVID-19 vaccine) in VAMS.

**To use VAMS, vaccine recipients must have an email address, internet access, and the ability to navigate the system or have someone assist them.

Your Role and Activities in VAMS

As a **jurisdiction POC**, VAMS serves as your primary tool for managing critical functions and oversight of COVID-19 vaccine distribution to clinics in your jurisdiction and enables you to:

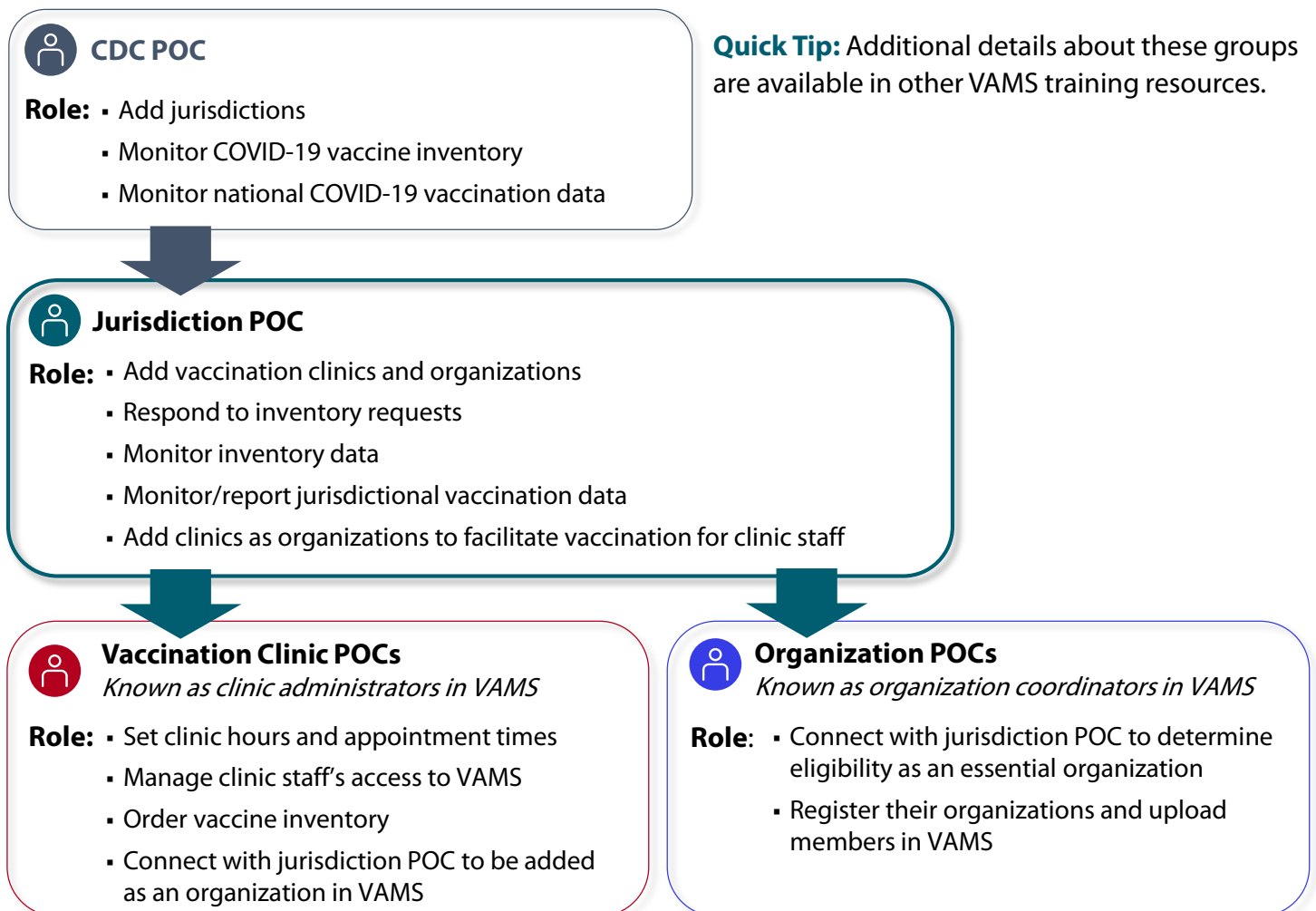
- Collect accurate, near real-time, de-identified, record-level data on COVID-19 vaccine administration consistently across your jurisdiction, avoiding variations in data quality and availability.
- Track and monitor vaccine administration.
- Promote real-time awareness of all of the above.

Below are additional details about your role as well as the three groups you will interact with during the ongoing COVID-19 vaccination efforts.

- Centers for Disease Control and Prevention (CDC).
- Vaccination clinics who will administer the COVID-19 vaccines in your jurisdiction.
- Organizations of priority group workers (including volunteers) in your jurisdiction.

You likely already have a CDC point of contact (POC). However, vaccination clinics and organizations need to select someone in their organization to be your POC.

In addition to your own role, this diagram provides an overview of the roles and responsibilities for each group's POC and shows the flow of information from one POC to another.






Jurisdiction POC User Manual

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

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

How to Use this User Manual

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

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

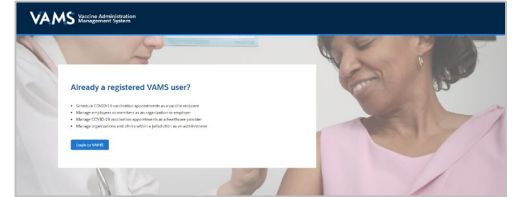
A Note About Privacy

To receive COVID-19 vaccine, vaccine recipients must enter data that are considered personally identifiable information (PII) and protected health information (PHI). PII is any data that could potentially identify a specific individual. PHI is information, including demographic information, that relates to the individual’s past, present, or future physical or mental health or condition. VAMS complies with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For more information about HIPAA, visit <https://www.cdc.gov/phlp/publications/topic/hipaa.html>.

Navigating VAMS

Quick Tip: VAMS works best in the Google Chrome browser but can be accessed via any browser except Internet Explorer. VAMS also works on mobile browsers.

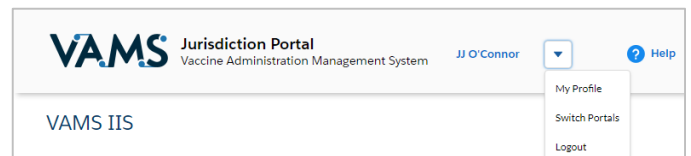
To access VAMS once registered, visit the landing page (<https://vams.cdc.gov/vaccineportal/s/vams-non-recipient-login>) and log in with your user name and password (see the next page for how to activate your VAMS account).



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

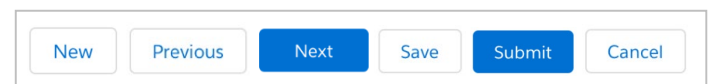
Header/Banner

- The **VAMS logo** takes you to your portal's home page.
- The **Help** link takes you to a list of frequently asked questions (FAQs) that will help you navigate the system.
- The **drop-down menu** located next to your name in the upper right corner of the page provides a method to:
 - Set your preferred method of contact (email or SMS) for receiving temporary codes for multi-factor authentication login by clicking **My Profile**.
 - Access another portal by clicking **Switch Portals**.
 - Log out of the system by clicking **Logout**.



Buttons

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



Tabs

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



Tables

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

Clinic Imports		
Import ID	Created By	Created Date
1 EMP-001558	JJ O'Connor	2021-01-11



Notifications from VAMS

Types of Email Notifications Users Should Expect From VAMS

While users can select their preferred method of communication to be email or SMS text, some communications will **always** be sent through email.

Email notifications from...

vams@cdc.gov will be auto-generated emails related to Clinic, Jurisdiction, Organization Portal messages such as:

- ✓ Registration links to new VAMS users
- ✓ Re-occurring two-factor authentication for logins
- ✓ Updates on inventory requests

no-reply@mail.vams.cdc.gov and **no-reply@envelope.mail.vams.cdc.gov** will be auto-generated emails related to the Recipient Portal such as:

- ✓ The initial two-factor authentication code
- ✓ Links for recipients to complete Prevacination Questionnaires
- ✓ Reminders about upcoming recipient appointments

VAMSHelp@cdc.gov will be:

- ✓ Communications from the VAMS Help Desk

***@salesforce.com**: Depending on some email server configurations, we have heard of rare cases where emails are delivered directly from Salesforce. Potential cases include password resets and interacting with VAMS Help Desk agents.

Section 1

Clinics in VAMS

Clinic Portal Roles in VAMS

There are four roles available in the Clinic Portal - clinic administrator (CA), inventory manager (IM), front desk (FD), and healthcare professional (HP). Depending on the clinic type, only some of the roles must be filled for a clinic to operate successfully. The matrix below provides a brief summary of the Clinic Portal roles and their activities in VAMS.

	CA	IM*	FD**	HP
Serve as the clinic POC for your jurisdiction.	■			
Manage clinic information (e.g., shipping address).	■			
Set and manage clinic schedule (<i>standard and mobile clinics only</i>).	■			
Manage clinic COVID-19 vaccine inventory.	■	■		
Manage (add, edit, remove) VAMS clinic users.	■			
Check in vaccine recipients, create walk-ins, or cancel appointments (<i>standard and mobile clinics only</i>).			■	
Administer vaccine to recipients.				■

*Optional role for all clinic types since the clinic administrator can also perform inventory management tasks

**Front desk role is not used in VAMS for third-party clinics since they do not check in recipients in VAMS

Clinic Types in VAMS

In VAMS, clinics are categorized within three main types - standard, mobile, and third-party. Within the standard clinic type, there are 4 sub-types. Below is a brief description of the different clinic types along with a list of accompanying clinic users, and examples of each type.

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

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

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

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

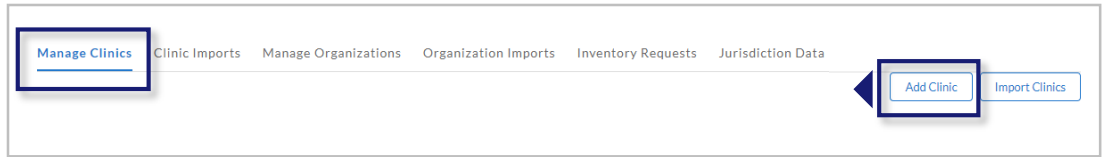
Clinics responsible for both adding and managing recipient records as well as administering and tracking recipients in VAMS	Long-term care facility (LTCF), employees-only clinic within a hospital, etc.
---	---

Other - "other" can be selected if a clinic doesn't fall within one of the categories listed above.

Add Clinics One at a Time

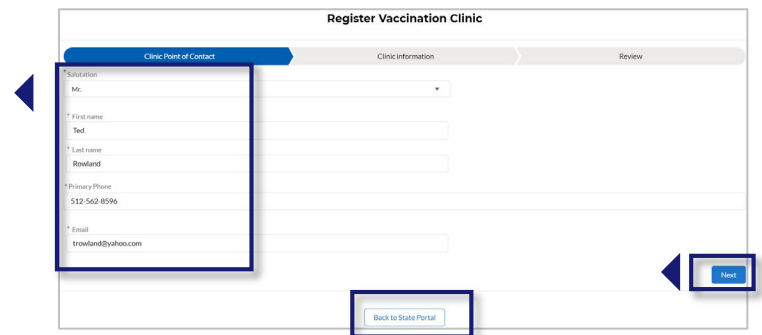
You can add clinics one at a time or you can add multiple clinics at once via bulk upload from the **Manage Clinics** tab. First, we will learn how to add one clinic at a time, then how to bulk upload them.

- Click **Add Clinic** on the Manage Clinics tab.



- Enter the **clinic POC's information**.
- Click **Next**.

Quick Tip: Click **Back to State Portal** to cancel this process. Cancelling the process **deletes** any clinic information entered so far in the process.



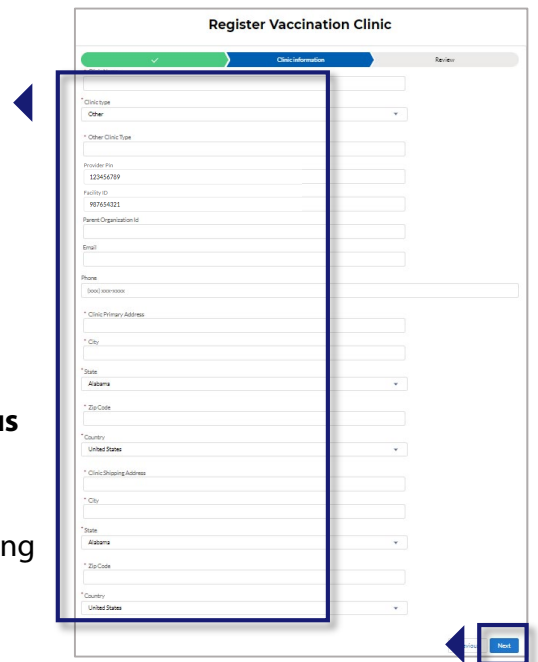
Note the fields marked with a red asterisk () are required.*

- Enter the clinic's information.
- Although the Provider PIN, Facility ID, and Parent Organization ID fields are not marked with a red asterisk, you must enter that information when adding clinics in VAMS unless you are told it is not required for your jurisdiction.
- The Facility ID is required for CDC reporting, the Parent Organization ID is required for HL7 integration, and the Provider PIN identifies the facility for ordering in VTrckS.

- Review all information entered on the Register Vaccination Clinic pages and **verify** it is correct. If so, click **Next**. If not, click **Previous** to make corrections.

NOTE: Once added, you **cannot change any information** associated with a clinic in VAMS, so review carefully prior to clicking Next on the Review page.

- After clicking **Next**, a message appears confirming the clinic is added to the system.
- Once they are added, clinic POCs receive an email from vams@cdc.gov with a link to activate their account and register their clinic in VAMS.

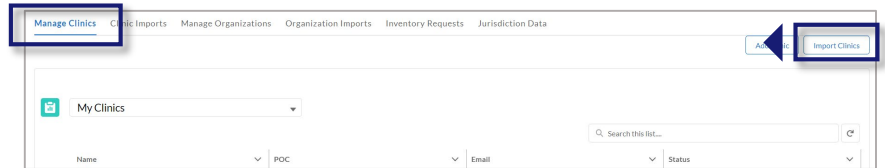


NOTE: To prevent duplication of clinic entries, VAMS will not add a clinic with the same address as a previously added clinic. If this occurs, you will receive an **error message** stating a clinic located at that address is already entered in the system.

Add Clinics via Bulk Upload

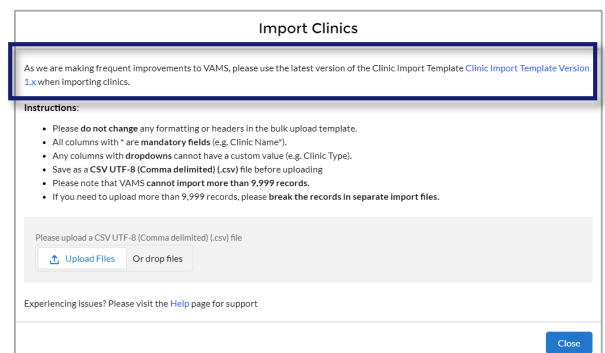
Bulk uploading allows you to add multiple clinics at once by adding their information in a comma delimited (.csv) template and uploading it in VAMS.

- Click **Import Clinics** on the Manage Clinics tab.



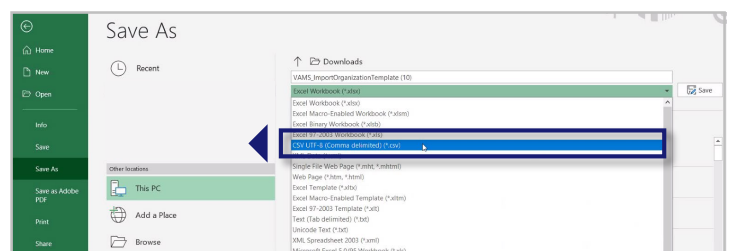
- Click the **Clinic Import Template** link in the pop-up window that appears. After clicking the link, the template file will download to your computer.

NOTE: Always ensure you download and use the latest version of the import template each time you attempt to bulk upload clinics in VAMS to take advantage of constant improvements and to avoid data issues/inconsistencies.



Important Notes about the Clinic Import Template File:

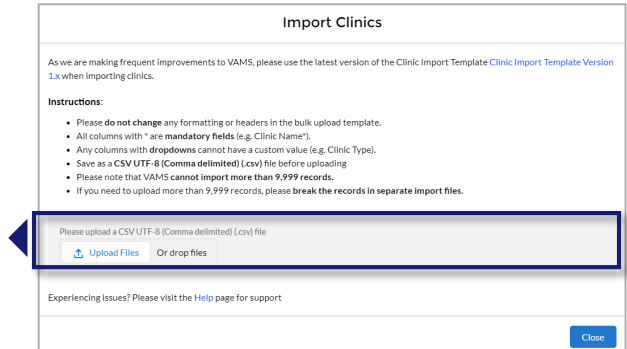
- The file opens on your computer as an .xlsx file, but you must save it as a **CSV UTF-8 (Comma delimited) (.csv)** file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.
- You must use the latest version of the template when uploading a list of clinics in VAMS.
- All fields marked with an asterisk in the template are required.
- VAMS will not upload a clinic if any of the required fields are blank.
- Fields that contain a pick list or drop-down options must contain a selection.
- VAMS will not upload **duplicates** if a clinic is listed in the csv file multiple times or if the clinic has already been added in VAMS.
- After inputting clinic information and saving the Clinic Import Template as a CSV UTF-8 file, you should close the file and immediately upload it into VAMS. Do not reopen the file on your computer between conversion and upload. In some cases, reopening the file after saving as a CSV UTF-8 file could alter field properties and cause the recipient upload to fail.



Quick Tip: A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values. A CSV file stores tabular data (numbers and text) in plain text.

Add Clinics via Bulk Upload *(continued)*

- Open the file and enter the **clinics' information**.
- Save the file as a **CSV UTF-8 (Comma delimited) (.csv)** file. You can find this option under the **Save As** drop-down menu in Excel.
- Click **Upload Files** in the Import Clinic List pop-up window. You can also drag and drop your clinic list in the **Drop Files** area of the page.
- Click **Close**.



Import Clinics

As we are making frequent improvements to VAMS, please use the latest version of the Clinic Import Template [Clinic Import Template Version 1.x](#) when importing clinics.

Instructions:

- Please do not change any formatting or headers in the bulk upload template.
- All columns with * are **mandatory fields** (e.g. Clinic Name*).
- Any columns with **dropdowns** cannot have a custom value (e.g. Clinic Type).
- Save as a **CSV UTF-8 (Comma delimited) (.csv)** file before uploading.
- Please note that VAMS cannot import more than **9,999 records**.
- If you need to upload more than 9,999 records, please **break the records in separate import files**.

Please upload a CSV UTF-8 (Comma delimited) (.csv) file

[Upload File](#) Or drop files

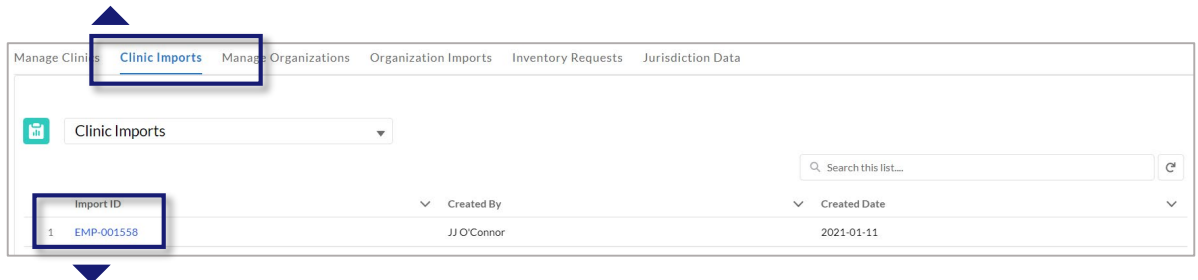
Experiencing Issues? Please visit the [Help](#) page for support

[Close](#)

Confirm Bulk Upload

After importing a list of clinics, these processes automatically occur in VAMS:

- A message appears on screen that your list is in the import queue.
 - VAMS sends a registration email to each clinic POC if their information was entered in the .csv file completely.
 - After your list has processed, you will receive an email from vams@cdc.gov, stating it has been uploaded
 - A result log appears on the Clinic Imports tab.
- Click the **Clinic Imports** tab to check the results of your bulk upload.
 - On the **Clinic Imports** tab, you see information about your upload, including the system-generated Import ID number, who imported the list, and when it was imported.



Import ID	Created By	Created Date
1 EMP-001558	JJ O'Connor	2021-01-11

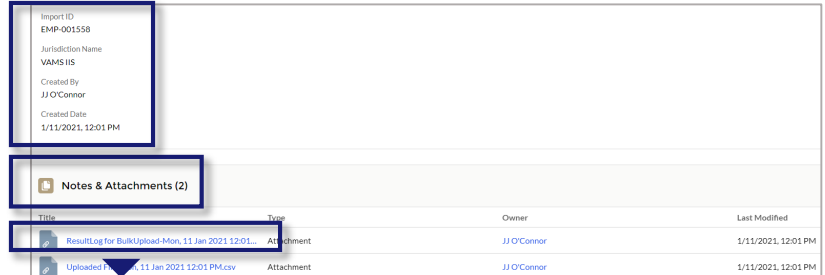
- Click the **Import ID** number of the clinic import to open the Import Details page.

Add Clinics via Bulk Upload *(continued)*

Confirm Bulk Upload *(continued)*

There are two main sections on the Import Details page:

- **Import details**, which includes the import ID, jurisdiction name, who created it, and the date created
- **Notes and Attachments** table, which includes two files: a **Result Log for Bulk Upload** and the clinic import file you uploaded



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

➤ Click the **Result Log for Bulk Upload** link to open the file.

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

V	W	X	Y	Z	AA	AB	AC
Clinic Shipping Address ZIP Code/Postal Code*	Clinic Shipping Address Country*	Status					
30305	Fulton	Data update failed. All of the fields with an asterisk(*) are required email already exists in the system					
30312	Fulton	Success					

- If there were duplicates or missing information in the .csv file, you will see an **error message** telling you why a clinic was not uploaded.
- All clinics that have a status of **Success** are uploaded in the system. Clinics with a status that includes an error message have not been uploaded in the system.

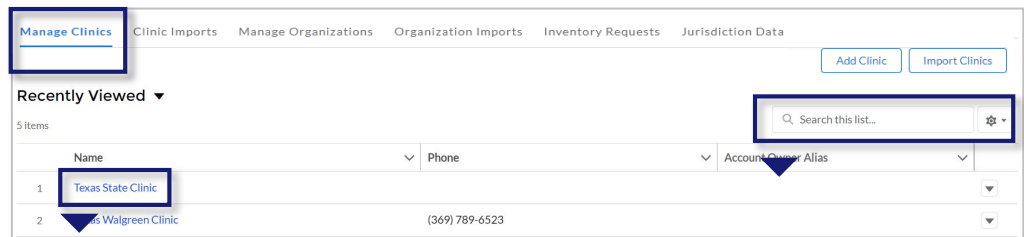
Search and View Clinics

Click the **Manage Clinics** tab to search for and view details of the clinics you've entered in VAMS.

NOTE: You will only be able to view the clinics added in your jurisdiction.

Search for a Clinic

The Manage Clinics tab offers multiple ways to search and sort data.

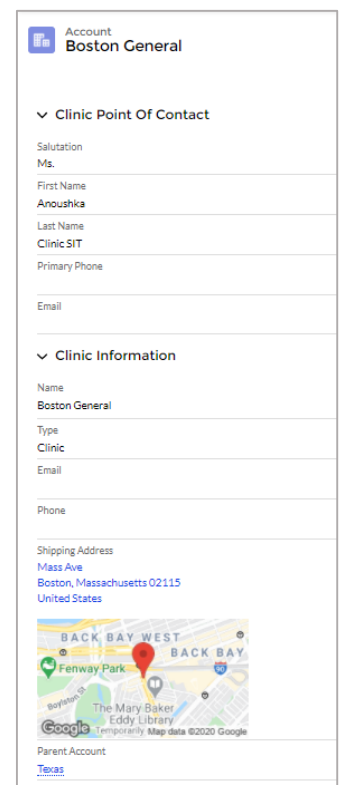


- On the Manage Clinics tab, scroll to the bottom of the list and click the **View All** link.
- On the View All page, you can sort by clicking the **arrows** in the columns to sort them by the column headers (e.g., name, email) or use the **search bar** to enter information such as clinic name, clinic POC, email address, or status.

View Details of a Clinic in Your Jurisdiction

- Click the **name of a clinic** to see detailed information.

NOTE: All fields on the Details page are **read-only** for the jurisdiction POC.

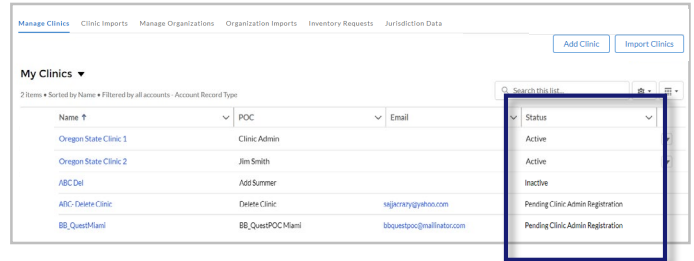


Manage Clinics

Clinic Status

The list of clinics you entered will appear on the Manage Clinics tab. The far-right column shows the clinic's status. This field is read-only and shows a clinic's registration status as one of the below.

- **Pending clinic admin registration:** The clinic is entered in VAMS, but the clinic's administrator has not registered their account.
- **Active:** The clinic's administrator registered their account.
- **Inactive:** The clinic is deactivated in VAMS (information on when and how to deactivate a clinic in VAMS is below).



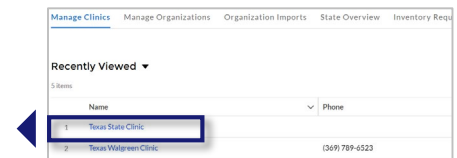
Deactivate Clinics in VAMS

You can deactivate a clinic when it is no longer needed to administer vaccines.

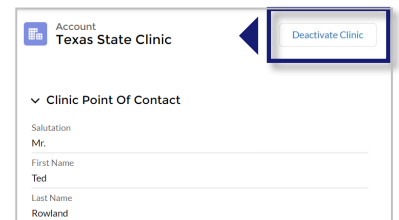
NOTE: Caution should be taken in deactivating a clinic in VAMS as it signals the system to do the following:

- Send an email to the clinic's administrators telling them the clinic is deactivated.
- Send a cancellation email to recipients with booked appointments.
- Cancel all appointments booked by recipients at the clinic.
- Remove the clinic from the list of searchable clinics.
- Deactivate all clinic inventory requests.
- Close all open appointments.

➤ Click the **name of the clinic** you want to deactivate on the **Manage Clinics** tab.

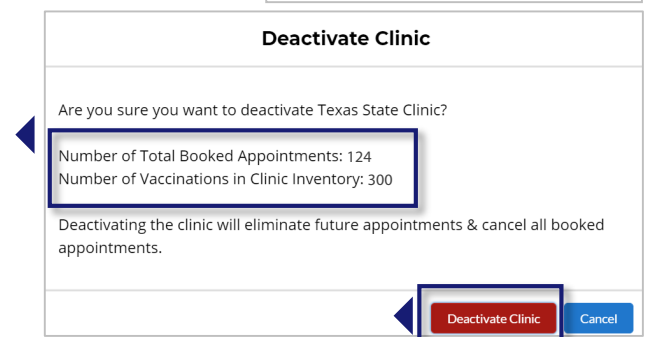


➤ Click **Deactivate Clinic** in the top right corner of the clinic's account page.



➤ **Review** the data shown in the **Deactivate Clinic** pop-up window, which includes the number of total booked appointments and vaccines in the clinic's inventory.

➤ Click **Deactivate Clinic**. If you do not want to deactivate the clinic, click **Cancel** to close the pop-up window and return to the clinic's account page.



Section 2

Organizations in VAMS

Once you add organizations in VAMS, organization coordinators will receive a registration email so they can activate their user account and register their organization in VAMS. After successfully registering their organization, the organization coordinator can provide their members with two ways to register themselves in VAMS:

1. The organization coordinator can add them in the system one at a time or via bulk upload which will trigger a registration email to be sent from VAMS to each member.
2. The organization coordinator can provide them with a common registration link that is established when an organization is authorized for Policy Enabled Registration or PER.

Policy Enabled Registration (PER)

Policy enabled registration allows an organization to provide a common registration link to their members. The **benefit** of using PER is that an organization coordinator does not have to add each organization member into VAMS. For an organization to use PER for their members, you must authorize them to do so, and they must provide you with at least one but up to three email domain names (e.g., fultoncounty.gov, fultoncounty.org, etc.) to enter in their organization record. The **caveat** is that whoever gains access to the common registration link and possesses an email address with one of the domain names provided by the organization coordinator, can register as a recipient.

How PER Works for Organizations and their Members

- After registering, the organization coordinator will see an organization-specific registration link above the tabs within their portal that they can distribute to their members.
- Members will access VAMS using the URL that is distributed from the organization, entering their name and organization email address that has the domain provided to you by the organization coordinator.
- The system will validate the email entered by the member has the same domain as one of the domains entered in the organization's record.
- VAMS will send a unique registration link to the member email (e.g., username@domain.com).
- Members will click the registration link and start the standard registration flow at prescreening. They will then enter personal and insurance (if applicable) information.

NOTES:

- Third-party email domains such as Yahoo Mail or Gmail **cannot** be used for PER. Domains used must be owned by the organization or an affiliate.
- Members **cannot** change their email after they've registered in VAMS.



Add Organizations in VAMS

Information You'll Need to Add Organizations in VAMS

- **Organization POC's information** (first name, last name, email address). Note that the organization POC is referred to as the organization coordinator in VAMS. An organization POC can add additional coordinators in the system after registering but there can only be one POC per organization.
- **Organization name**
- **Organization category** (e.g., inpatient healthcare professionals, etc.)
- **Organization state, ZIP/postal code, and country**
- **Whether organization has or has not been authorized for PER**
NOTE: This must be done when you first add the organization in VAMS as you **cannot edit an organization's record** after adding it in the system.

Before Adding New Organizations in VAMS

Ensure you have proactively communicated with them about the IT recommendations below to expressly permit VAMS notifications from specific email and IP (internet protocol) addresses to be received by their systems. Ensure you have also communicated with and trained new organizations before providing access to the live VAMS site.

Allow notifications from the following email addresses

To ensure communications do not get delayed or blocked by an organization's exchange servers, advise them to work with their IT departments to allow notifications from the following email addresses:

- vams@cdc.gov
- no-reply@mail.vams.cdc.gov
- no-reply@envelope.mail.vams.cdc.gov
- VAMSHelp@cdc.gov
- *@salesforce.com

Allow notifications from the following IP addresses

Allowing email from specific IP addresses will also greatly improve email deliverability in a timely fashion. Advise organization coordinators to coordinate with their IT department to allow the email addresses above as well as email from the following IPs:

Salesforce

96.43.152.64 - 96.43.152.80 (subnet mask = 255.255.255.0)
 96.43.153.64 - 96.43.153.80 (subnet mask = 255.255.255.0)

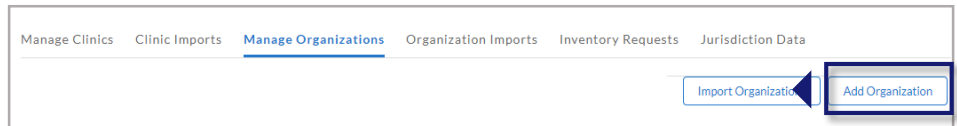
Amazon Web Services

23.251.255.1 - 23.251.255.150
 23.251.253.228 - 23.251.254.250
 54.240.40.1 - 54.240.40.54

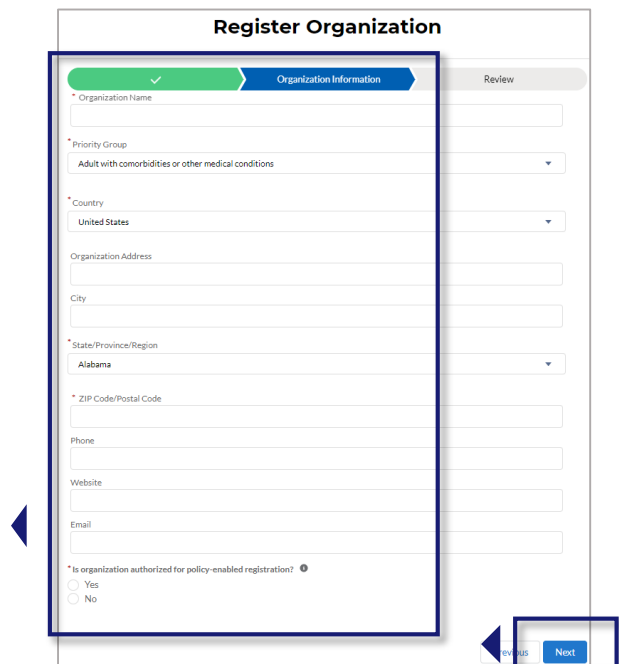
Add Organizations One at a Time

You can add organizations one at a time or you can add multiple organizations at once via bulk upload from the **Manage Organizations** tab. First, we will learn how to add one organization at a time, then how to bulk upload them.

- Click **Add Organization** on the Manage Organizations tab.



- Enter the **organization POC's information**.
- Click **Next**.
- Enter the **organization's information**.
Click **Next**.
- If an organization becomes authorized or unauthorized for PER after you have added them in VAMS, you can submit a help desk ticket to change their record. More information on how to submit a help desk ticket can be found in the [Access Support](#) section of this manual.



- Review all information entered on the Register Organization pages and **verify** it is correct. If so, click **Next**. If not, click **Previous** to make corrections.

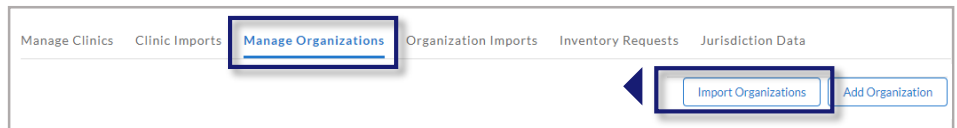
NOTE: Once added, you **cannot change any information** associated with an organization in VAMS, so review carefully prior to clicking Next on the Review page.

- After clicking **Next**, a message appears confirming the organization is created in the system. Their status will be **Pending Organization Admin Registration** until the organization's coordinator activates their account and registers the organization in VAMS.
- Once added, the organization coordinator receives an email from vams@cdc.gov with a link to activate their account and register their organization in VAMS. If an organization coordinator has yet to register in VAMS 5 days after receiving their registration link, VAMS automatically sends a reminder email to the member. Reminder emails will continue until the organization coordinator registers or until 5 consecutive reminders have been sent.

Add Organizations via Bulk Upload

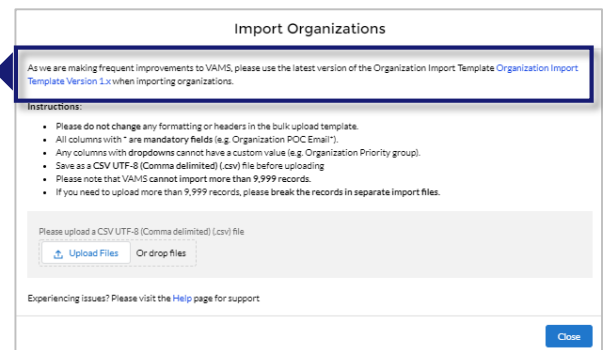
Bulk uploading allows you to add multiple organizations at once by adding their information in a comma delimited (.csv) template and uploading it in VAMS. **NOTE:** The template **does not** have a place to record PER information, so organizations that have been authorized to use PER must be added in VAMS individually.

- Click **Import Organizations** on the Manage Organizations tab.



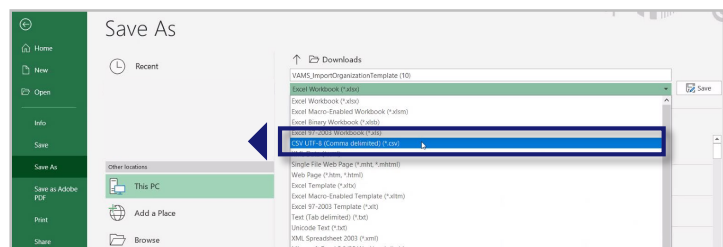
- Click the **Organization Import Template** link in the pop-up window that appears. After clicking the link, the template file will download to your computer.

NOTE: Always ensure you download and use the latest version of the import template each time you attempt to bulk upload organizations in VAMS to take advantage of constant improvements and to avoid data issues/inconsistencies.



Important Notes about the Organization Import Template File:

- The file opens on your computer as an .xlsx file, but you must save it as a **CSV UTF-8 (Comma delimited) (.csv)** file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.
- You must use this template when uploading a list of organizations in VAMS. Always ensure you download and use the latest version of the import template each time you attempt to bulk upload organizations in VAMS to take advantage of ongoing improvements and to avoid data issues/inconsistencies.
- All fields marked with an asterisk are required.
- Fields that contain a pick list or drop-down options must contain a selection.
- VAMS will not upload an organization if any of the required fields are blank.
- VAMS will not upload **duplicates** if someone is listed in the csv file multiple times.
- After inputting clinic information and saving the Clinic Import Template as a CSV UTF-8 file, you should close the file and immediately upload it into VAMS. Do not reopen the file on your computer between conversion and upload. In some cases, reopening the file after saving as a CSV UTF-8 file could alter field properties and cause the recipient upload to fail.



Quick Tip: A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values. A CSV file stores tabular data (numbers and text) in plain text.

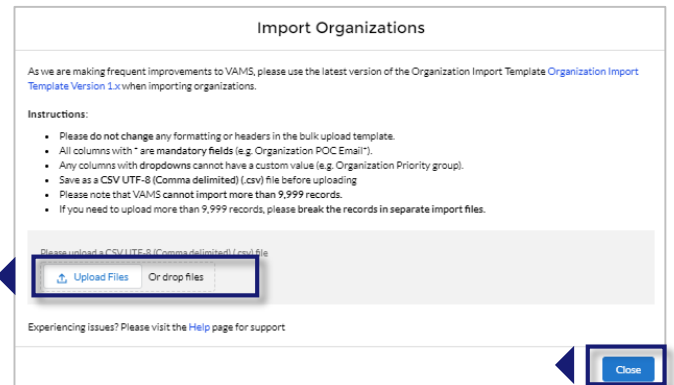
NOTE: The template does not have a place to record PER information, so organizations that have been authorized to use PER must be added in VAMS individually.



Add Organizations via Bulk Upload

(continued)

- Open the file and enter the **organizations' information**.
- Save the file as a **CSV UTF-8 (Comma delimited) (.csv)** file. You can find this option under the **Save As** drop-down menu in Excel.
- Click **Upload Files** in the Import Organization List pop-up window. You can also drag and drop your organization list in the **Drop Files** area of the page.
- Click **Close**.



Confirm Bulk Upload

After importing a list of organizations, these processes automatically occur in VAMS:

- A message appears on screen that your list is in the import queue
 - VAMS sends a registration email to each organization's coordinator if their information was entered in the csv file completely
 - After your list has processed, you will receive an email from vams@cdc.gov, stating it has been uploaded.
 - A result log appears on the Organization Imports tab
- Click the **Organization Imports** tab to check the results of your bulk upload.

Import ID	Created By	Created Date
EMP-000274	Texas State User POC	8/10/2020, 1:49 PM
EMP-000275	Texas State User POC	8/10/2020, 1:51 PM
EMP-000276	Texas State User POC	8/10/2020, 1:52 PM

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

- Click the **Import ID** number of the organization import to open the Import Details page.



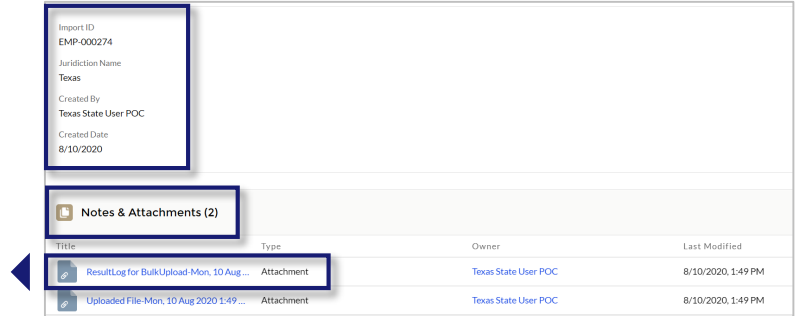
Add Organizations via Bulk Upload

(continued)

Confirm Bulk Upload (continued)

There are two main sections on the Import Details page:

- **Import details**, which includes the import ID, jurisdiction name, who created it, and the date created.
- **Notes and Attachments** table, which includes two files: a **Result Log for Bulk Upload** and the organization import file you uploaded.
 - The **Result Log for Bulk Upload** file shows the results of your file upload.



➤ Click the **Result Log for Bulk Upload** link to open the file.

➤ Scroll to the right until you see the **status column**. The **status column** shows whether an organization was added in the system.

K	L	M	N	O	P	Q	R	S	T	U	V
Organizati	Organizati	Organizati	Organizati	Status							
Las Vegas	Nevada	12344	United Sta	This Organization POC already exists in the VAMS system please check the POC Email							

- If there were duplicates or missing information in the csv file, you will see an **error message** telling you why an organization was not uploaded.
- All organizations who have a status of **Success** are uploaded in the system. Organizations whose statuses include an error message have not been uploaded in the system.



Search and View Organizations

Click the **Manage Organizations** tab to search for and view details of the organizations you've entered in VAMS.

NOTE: You will only be able to view the organizations added in your jurisdiction.

Search for an Organization

The Manage Organizations tab offers multiple ways to search and sort data.

	Name	Phone	Account Owner Alias
1	Texas State Clinic		
2	Walgreen Clinic	(369) 789-6523	

- On the Manage Organizations tab, scroll to the bottom of the list and click the **View All** link.
- On the View All page, you can sort by clicking the **arrows** in the columns to sort them by the column headers (e.g., name, email) or use the **search bar** to enter information such as clinic name, clinic POC, email address, or status.

View Details of an Organization in Your Jurisdiction

- **Click** the name of an organization to see detailed information.

NOTE: All fields on the Details page are **read-only** for the jurisdiction POC.

Organization Point of Contact

Salutation
Mr.

First Name
Matt

Last Name
Minns

Primary Phone

Email
vams.traineremployer01@gmail.com

Organization Information

Name
IIS Healthcare Workers

Organization Category
Inpatient healthcare providers

Email

Phone

Shipping Address
[Michigan 49345](#)
[United States](#)

Parent Account
[VAMS IIS](#)

Section 3

Inventory Requests Management in VAMS

Clinic inventory managers or clinic administrators will submit COVID-19 vaccine inventory requests in VAMS for you to receive and fulfill.

You can view and manage inventory requests from clinics on the Inventory Requests tab. From here, you can access their inventory request record to review request details as well as communicate with clinics about the status of their request.

NOTE: While you will receive inventory requests in VAMS, you will place all vaccine orders from manufacturers **outside of VAMS** through your existing supply ordering processes.

View and Manage Inventory Requests

➤ Click the **Inventory Requests** tab.

Inventory Reques... ↑ ↓	Clinic	Product	Date Requested	Date Required By	Doses Requested	Status
73 IRN-0075	CVS Burlington Pharmacy	COVID-B	8/27/2020	8/27/2020	20	Submitted
74 IRN-0076	CVS Burlington Pharmacy	COVID-B	8/28/2020	8/28/2020	20	Submitted
75 IRN-0077	kentucky clinic CST	COVID-B	8/28/2020	8/28/2020	1	Submitted
76 IRN-0078	kentucky clinic CST	COVID-B	8/28/2020	8/28/2020	1	Submitted
77 IRN-0079	CVS Farmacy	COVID-A1	8/29/2020	9/1/2020	1,000	Submitted

The Inventory Requests tab shows you a list of all inventory requests received from clinics in your jurisdiction. The list includes a system-generated **inventory request number**, **clinic name**, **product type** (vaccine type), **date requested** and **required by**, number of **doses requested**, and the inventory request **status**.

Sort requests on this page by clicking the arrows in the columns to sort them by the column headers (e.g., clinic name, product, etc.).

Inventory Requests Management in VAMS *(continued)*

Access Inventory Request Record

The inventory request record gives you important details about the inventory request and a way to monitor it and communicate with the requestor.

Inventory Reques... ↑ ↓	Clinic	Product	Date Requested	Date Required By	Doses Requested	Status
73 IRN-0075	CVS Burlington Pharmacy	COVID-B	8/27/2020	8/27/2020	20	Submitted
74 IRN-0076	CVS Burlington Pharmacy	COVID-B	8/28/2020	8/28/2020	20	Submitted

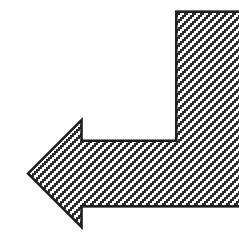
➤ Click the **Inventory Request Number** in the list to access the inventory request record.

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 requestor.
Send the requestor a message by typing in the **Post** box and clicking **Share**. When communicating with the requestor, make sure to include relevant information about the shipment. For example, if you split up inventory to send to multiple locations, be sure to communicate the Unit of Sale National Drug Code or UoS NDC to the receiving clinics.

Monitor or follow comments made to your posts.
Like you would on a social media platform, click **Follow** to receive email notifications when the requestor responds to a post that you make in the inventory request record. You will **not** receive notifications for new posts.



In this example...

- ❖ “State User 2” **types** a message in the **Post** box about their ability to fulfill only half of the inventory request and **shares** it with “Mike Inventory Mgr.”
- ❖ “Mike Inventory Mgr.” **responds** to “State User 2’s” post by writing in the comment bar found under each post.
- ❖ If “State User 2” clicks **Follow**, they will receive an email notification alerting them that “Mike Inventory Mgr.” has responded to their post.



Inventory Requests Management in VAMS

(continued)

Manage Inventory Status

Jurisdiction POCs can use the inventory request record to manage and update the status of inventory requests.

To change the status of an inventory request from the inventory request record:

- Click **Edit** in the upper left-hand corner of the page.

A screenshot of a web interface showing an 'Edit' button in the top left corner, highlighted with a blue box and an arrow. Below the button, the text 'Status Submitted' is visible. Further down, the text 'Inventory Request Number IRN-0690' is displayed.

- Select the **updated status** of the inventory request. Options include submitted, approved, approved with modifications, waiting on additional information, and rejected.

A screenshot of a web interface showing a 'Save' button in the top left corner, highlighted with a blue box and an arrow. Below the button, a dropdown menu is open, showing the current status 'Submitted' and a list of other status options: '--None--', 'Submitted' (with a checkmark), 'Approved', 'Approved with modifications', 'Waiting on additional information', and 'Rejected'. The 'Submitted' option is highlighted in blue.

- Click **Save** after selecting the status.

NOTE: Users who manage inventory for clinics will see the updated status reflected in the inventory request record but will not have the capability to edit it.

Section 4

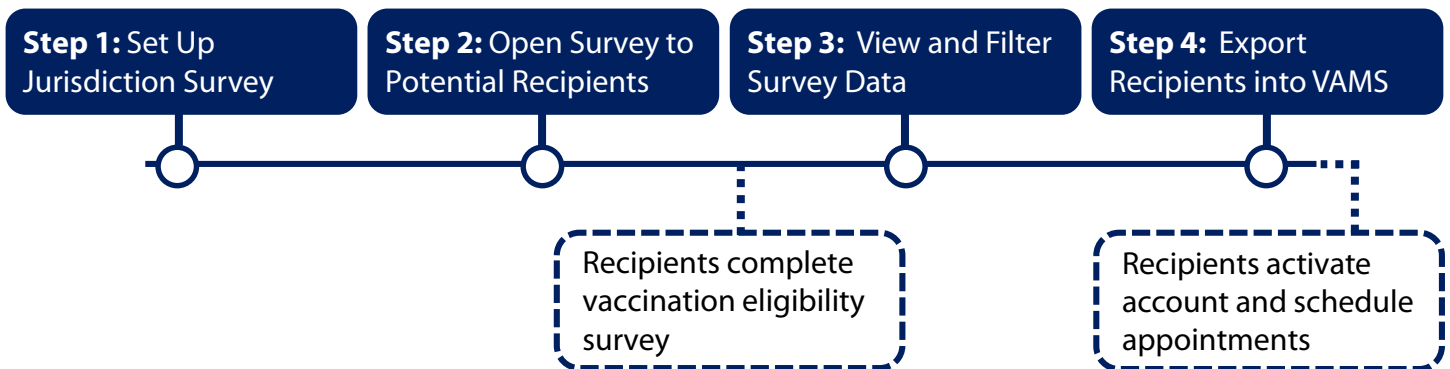
Flexible Registration in VAMS

The **VAMS flexible registration tool** is a survey tool that allows jurisdictions to collect demographic and personal information about potential vaccine recipients in their jurisdiction and add them into VAMS. Potential vaccine recipients will fill out a survey collecting relevant information about their vaccination eligibility.

You can then use the survey results to filter and find recipients who align with their vaccine rollout plans, using the tool to upload them into VAMS. 10 jurisdiction POCs per jurisdiction may have access to the flexible registration export portal. Please work with your onboarding specialist to request access.

NOTE: This login will be separate from your VAMS account credentials.

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



Set Up Jurisdiction Survey

Each jurisdiction will have its own semi-customizable survey to collect demographic information for vaccination eligibility purposes. **Jurisdiction POCs will work with their onboarding specialist to assist with customization needs.**

Jurisdiction POCs may customize:

- Which questions are shown to recipients (questions and answers cannot be edited)
- Survey welcome message
- Completed survey confirmation message (within survey)

Jurisdiction POCs may not customize:

- Question verbiage
- Answer verbiage
- Which answers are shown within each question
- Completed survey confirmation email



Flexible Registration in VAMS *(continued)*

Open Survey to Potential Recipients

After customizing your survey, you will receive a unique link for survey distribution. Once jurisdictions make the link available to their population (e.g., embed it in their jurisdiction's website or send using other communication mediums), potential vaccine recipients will:

- Click the **link** to begin the registration process.
- Fill out the questions on the survey. Preregistration surveys may collect the following information:
 - Age group/DOB
 - Living situation (nursing home, group home, homeless)
 - Residency area (rural or non-rural)
 - Priority group status by job (healthcare worker, frontline essential worker, or other essential worker groups)
 - Comorbidities
 - Contact information (first name, last name, ZIP code, email)
- Click **Submit** in the bottom left-hand corner to submit the survey. After submitting, potential vaccine recipients will receive a confirmation message and an email confirming their preregistration status.
 - After successful submission, potential vaccine recipients may click **Reset** to clear the form and begin filling it out for another individual.

NOTE: A unique email is required for survey. Potential vaccine recipients must use a unique email address to register. If an individual attempts to preregister with an email address already submitted with the preregistration survey or already within VAMS, they will receive an error message asking them to try again with a different email address.

View and Filter Survey Data to Export Recipients into VAMS

After an individual submits their survey, their response is added to a data repository for their jurisdiction. Up to 10 jurisdiction POCs per jurisdiction can use the Flexible Registration Export Portal to access their jurisdiction's survey data. Once added to the portal, you may filter the data to find potential vaccine recipients who are eligible per the jurisdiction's vaccine rollout plan and add them into VAMS.

To begin exporting recipients after receiving access to the system:

- Log into the **Flexible Registration Export Portal** with your user name and password.

Sign in with your email and password

Email

Password

[Forgot your password?](#)



Flexible Registration in VAMS *(continued)*

View and Filter Survey Data to Export Recipients into VAMS *(continued)*

- Filter your jurisdiction's survey data. You may **select or deselect checkboxes** for group(s) to filter their data based on groupings for current vaccination eligibility.
 - **Selecting N/A** for a question means this question will not be filtered. All records will be returned, including blanks.

Living Situation

N/A

Nursing home or longer-term care facility

Group home for people with disabilities

Homeless

- **Unchecking** everything in a section will return records without responses to those questions.

Living Situation

N/A

Nursing home or longer-term care facility

Group home for people with disabilities

Homeless

- **Checking** responses other than N/A will return those responses.

Living Situation

N/A

Nursing home or longer-term care facility

Group home for people with disabilities

Homeless



Flexible Registration in VAMS *(continued)*

View and Filter Survey Data to Export Recipients into VAMS *(continued)*

- Click **Count**. This will trigger a count of the number of individuals in the group(s) selected.
 - The initial count must be 100,000 records or less or the **Preview Results** button and **Export to VAMS** button will not be available. Jurisdiction POCs must adjust their groupings and filters until the number is less than 100,000 to proceed to the next step.

- Use the **Preview Results** button once the initial count is less than 100,000 records to preview the list of individuals for export into VAMS and download their data to maintain and store records. Although the initial count may be for up to 100,000 records, you may only preview and export a maximum of 50,000 records at a time. By **inputting** a whole number less than or equal to 50,000 in the **Preview Limit** field and clicking **Preview Results**, you will trigger a download of the data containing the number of individuals up to the number in the **Preview Limit** field (e.g., a count of 15,000 will only allow a preview of 15,000 even if the preview limit is set to 50,000). Opening the Excel file allows you to view and filter the data of everyone uploaded into VAMS. These data include an individual's preregistration time stamp, jurisdiction location, living situation, rural (Y/N), healthcare worker status, frontline worker status, essential worker status, comorbidities, first name, last name, email address, ZIP, and phone number.
 - **Use the Preview button before each export if you wish to maintain a list of exported records.** After exporting to VAMS, you will not be able to run another preview on the same data set since the data have been moved from the survey and exported into VAMS.

- Export individuals into VAMS. Set the number in **the Export Limit** field up to 50,000 based on the number of individuals in the count. Once you are ready to export, click **Export to VAMS**. Upon successful export, a success notification will appear below the button.

- After a successful export, the individuals added into VAMS will receive an email from VAMS to activate their account in the system. From there, they may begin to schedule an appointment in the system.

If over 50,000 results were originally queried, jurisdiction POCs may click **Count** again to update their query. Upon clicking the button, the count will update and subtract the number of individuals who were recently exported to VAMS. **NOTE:** To prevent duplicate exports, wait until the progress message shows all records have been exported and the success message appears before running another query.

To export a different group, you may refilter the data and begin the above process again. **NOTE:** You may only export up to 200,000 total records per day.



Flexible Registration in VAMS *(continued)*

View and Filter Survey Data to Export Recipients into VAMS *(continued)*

Key Considerations for VAMS Recipient Export:

- Export is a background process and takes time to complete. After running an export, wait until the progress message disappears and you receive a successful export message before running another query in order to prevent duplicate exports.
- **Jurisdictions each may export up to 200,000 total records per day.**
- Although you can only preview and export 50,000 records at a time, you can initially sort and run a count on up to 100,000 records. If you have over 50,000 records in your count, you will need to run a second export to export the remainder of records to VAMS. After the initial export, you can click **Count** to confirm the records imported successfully. If so, the number displayed will reduce by the number of individuals last exported into VAMS since they have been exported and, therefore, removed from the data set.
- Click **Preview Results** after a count to maintain records of individuals uploaded in VAMS. Clicking the button will open a list of individuals with their survey data that you then may download as an Excel file and use for your records. Do this after every upload to maintain an accurate list of all individuals who have been exported to VAMS. **NOTE:** At this time, there is no way to see the full list of all individuals who have submitted a survey.

Section 5

Assisted Scheduling with a Jurisdiction Contact Center

About Assisted Scheduling with a Jurisdiction Contact Center

The **Jurisdiction Contact Center** allows jurisdictions to add a group of contact center agents to VAMS. They can then use VAMS to schedule and manage recipient appointments.

Gaining Access to the Jurisdiction Contact Center Feature

Jurisdiction POCs who would like to use the **Jurisdiction Contact Center feature** for assisted scheduling in VAMS should reach out to their onboarding specialist to gain access to the contact center manager user role. You will not be able to use the contact center functionality until you have contact center manager permissions.

Contact Center User Roles

The Jurisdiction Contact Center has two main user roles: contact center managers and contact center agents.

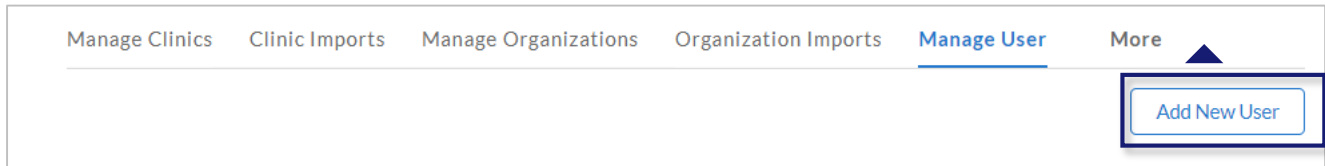
- **Contact center managers** are jurisdiction points of contact added by the VAMS operations team who can add agents to their jurisdiction's contact center using the **Manager User** tab in the Jurisdiction Portal. They also have access to the **Manage Recipients** tab to schedule appointments on behalf of recipients.
- **Contact center agents** are individuals added by the jurisdiction points of contact who can schedule appointments on behalf of recipients using the **Manage Recipients** tab. They will have access to this tab via the Contact Center Agent Portal.

Jurisdiction Contact Center *(continued)*

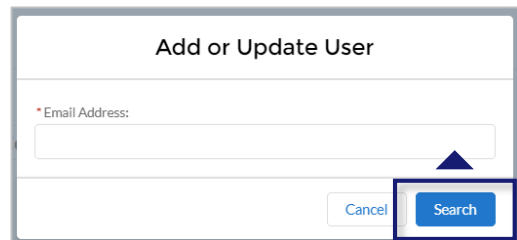
Managing Contact Center Agents

In the **Jurisdiction Portal**, you can add or remove contact center agents and managers on the **Manage User** tab.

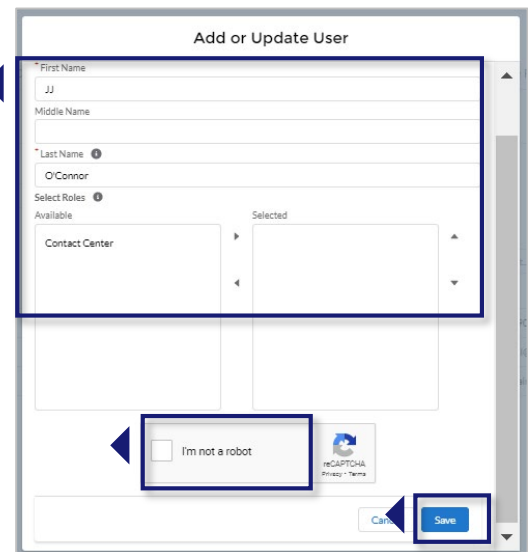
- To add agents or managers, click **Add New User** in the upper right-hand corner.



- Enter the user's email address in the **Add or Update User pop-up window**. Click **Search**.




- Enter the user's first name and last name. Select the **Contact Center** role from the left box and use the arrows to move it to the right box.
- Complete the reCAPTCHA.
- Click **Save** when complete. The user then appears in the My Contact Center Users table.



Jurisdiction Contact Center *(continued)*

Managing Contact Center Agents *(continued)*

- To remove a user, select the checkbox next to a manager or agent's name in the list. Click **Remove User**. Confirm removal by selecting **Yes** in the pop-up window.





My Contact Center Users

Search this list...

	First Name	Last Name	Email
1	<input type="checkbox"/> Mehak	Akmal	4e625a50-190d-45a8-8ef9-84ef28e045aa@mailslurp.com
2	<input type="checkbox"/> Mehak	Akmal	amehakakmal@gmail.com
3	<input type="checkbox"/> Charlie	Bernard	vams.clinictrainer0@gmail.com

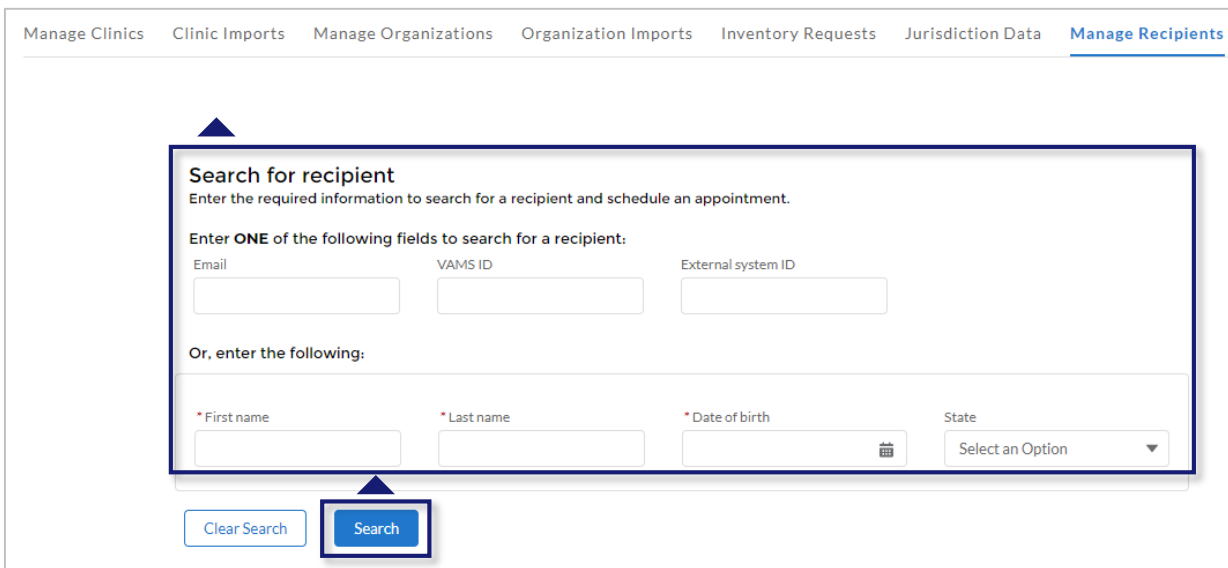
- To edit a user's profile, hover over the field you want to edit in the **My Contact Center Users** table.
- Click the **pencil icon** that appears in the cell. **If the user has not registered their account yet in VAMS**, you can edit a user's first name, last name, and email address. Once all edits are made, click **Save** at the bottom of the table.



3	<input type="checkbox"/> Charlie	Bernard	vams.clinictrainer0@gmail.com	
---	----------------------------------	---------	-------------------------------	--

Scheduling Appointments on Behalf of Recipients

Both contact center managers and agents can register recipients for vaccination appointments via the **Manage Recipients** tab. Search for the recipient's record by entering their email address, VAMS ID, or external ID, **or** by entering their first and last name, and date of birth. Note in the second option, the first three fields are required as indicated by a red asterisk.



Manage Clinics | Clinic Imports | Manage Organizations | Organization Imports | Inventory Requests | Jurisdiction Data | **Manage Recipients**

Search for recipient
Enter the required information to search for a recipient and schedule an appointment.

Enter **ONE** of the following fields to search for a recipient:

Email VAMS ID External system ID

Or, enter the following:

* First name * Last name * Date of birth State

Jurisdiction Contact Center *(continued)*

Scheduling Appointments on Behalf of Recipients *(continued)*

- If they are an existing recipient, select the box next to their name in the search results table. Then click **Schedule Future Appointment**.

Search results

<input type="checkbox"/>	Name	DOB	Gender	State	Cell phone	Email	Thir...	Vaccine st...	Follow-up vacc...	Vaccine na...	VAMS ID	External sy...	Address
<input type="checkbox"/>	John Montgomery	November 16, ...	Male	Michigan	(313) 867-5309	✉ vms.clinic...				Pfizer-BioNTec...	VAMS-100007...		22 Warner Rd, Grosse Pointe Farms, Michigan, 48236, USA

Schedule future appointment

- If the recipient has no prior COVID-19 vaccine dose recorded in VAMS, the system will ask you if the recipient received a prior dose of COVID-19 vaccine. If you select Yes, the system will ask for the vaccine manufacturer and the date of the vaccination. Whether you select Yes or No, once all selections are made, click **Continue** to proceed with vaccination.

Before you schedule
We do not currently have a record of vaccination for the recipient. Please answer the following questions to schedule their appointment.

Note: This is in reference to vaccination, not to any COVID-19 testing you may have received.

* Has the recipient ever received a COVID-19 vaccine?
 Yes
 No

* Which vaccine did the recipient receive?
 Pfizer-BioNTech
 Moderna
 They don't remember

* Prior vaccination date

Continue

- Search for a clinic to view available appointments. When the clinic list view populates, select a clinic and click **Next**.

Schedule recipient's 2nd dose appointment

Address or ZIP code: 30301 Within: 5 miles Clinic type: Standard clinics Limited service clinics **Search**

Note: "Earliest date possible" is an estimate and might change. Select the clinic to see the exact availability.

Next

- Select an available date and time for the appointment and click **Next**.

Schedule recipient's 2nd dose appointment

Clinic location: Downtown Atlanta Mass Vaccination Clinic, 123 Main St, Arlington, VA 22022

Hours: Sunday 8:30AM - 5PM, Monday 8AM - 5:30PM, Tuesday 8:30AM - 5PM, Wednesday 8AM - 5:30PM, Thursday 8:30AM - 5PM, Friday 8AM - 5:30PM, Saturday 8:30AM - 5PM

Calendar: November 2020, Monday November 09, 2020

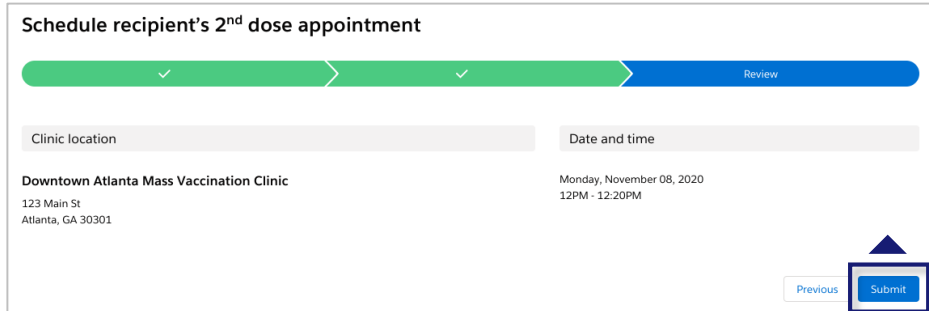
Time slot	9:00AM - 9:15AM	11:15AM - 11:30AM	1:30PM - 1:45PM
9:15AM - 9:30AM	Available	Available	Available
9:30AM - 9:45AM	Available	Available	Available
9:45AM - 10:00AM	Available	Available	Available
10:00AM - 10:15AM	Available	Available	Available
10:15AM - 10:30AM	Available	Available	Available
10:30AM - 10:45AM	Available	Available	Available
10:45AM - 11:00AM	Available	Available	Available
11:00AM - 11:15AM	Available	Available	Available

Next

Jurisdiction Contact Center *(continued)*

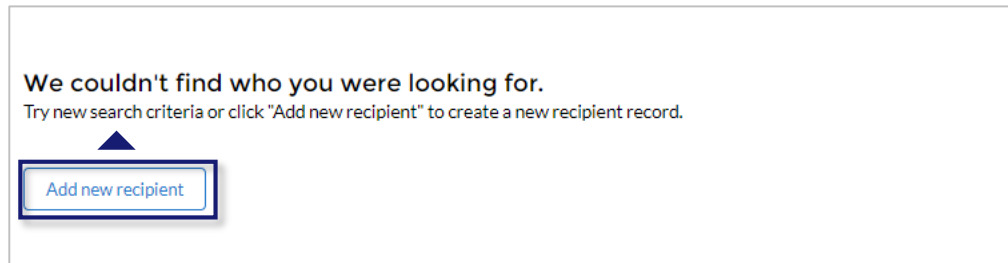
Scheduling Appointments on Behalf of Recipients *(continued)*

- Confirm the appointment information and click **Submit** to book the appointment.

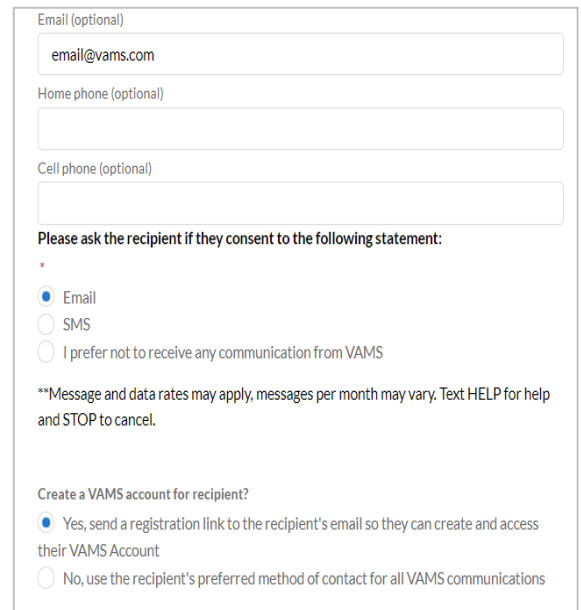


If the potential vaccine recipient does not have an existing account in VAMS, they will not appear in search results. Instead, contact center users will use the **Manage Recipients** tab to enter their information in VAMS, create their VAMS account (optional), and then schedule their appointment.

- Click **Add New Recipient** at the bottom of the search screen.



- Enter the recipient information. Fields marked with an asterisk are required and include: first name, last name, gender, date of birth, ethnicity, race, and home address. Email address and cell phone number are optional. If you enter either an email address or cell phone number, you are asked to select the recipient's preferred contact method.
 - If you enter an email address, you are also given the option to create a VAMS account for them. If you select Yes, they will receive an email to the provided email address to create a VAMS password and begin activating their account.
 - If you enter a cell phone number, you are prompted to provide a one-time multi-factor authentication code that is sent to the cell phone number provided. Ask the recipient to provide the authentication code they received, enter the code, and click **Confirm**.





Jurisdiction Contact Center *(continued)*

Scheduling Appointments on Behalf of Recipients *(continued)*

- Click **Next** after entering all recipient information.

- Entering insurance information is optional. Whether you enter information or leave the fields blank, click **Next** to continue.

- Review the information and check the box confirming it is correct. Click **Finish**.

- Select **Schedule Future Appointment** on the confirmation page. Follow the same process listed under the existing recipient portion above to schedule the recipient's appointment.

NOTE: VAMS will check for duplicate recipients and will not allow you add a user already added in VAMS. The system will also check for any existing appointments for the recipient and notify you of any conflicting appointments before scheduling. You can either keep or cancel an existing appointment for the recipient.



Jurisdiction Contact Center *(continued)*

Managing Recipient Information

If a recipient has **not** made a VAMS account, contact center managers and agents can edit recipient records.

- On the Manage Recipients tab, search for a recipient to edit their record.
- Once you've located the recipient, click their **name** in the search results table to be taken to their record detail page.

Search results											Schedule future appointment		
<input type="checkbox"/>	Name	DOB	Gen... ▾	State ▾	Cell... ▾	Email ▾	Thir...	Vac... ▾	Follow-u...	Vac... ▾	VA... ▾	Ext... ▾	Add... ▾
<input type="checkbox"/>	John Smith	April 06, ...	Male	Michigan		✉ email...					VAMS-1...		123 Main St, Detroit, MI 48236, Unit States

- Click **Edit** to edit the recipient's contact information, demographics, emergency contact, or insurance information.

Recipient information

Demographic information
Fill out the following information for the primary account holder.

Salutation

First name	Middle name	Last name
John		Smith

NOTE: You cannot edit the recipient's vaccination record or edit records of recipients who have completed their vaccination schedule or who have already registered in VAMS. If a registered recipient needs to edit their record, they can do so in the Recipient Portal.

Section 6

Jurisdiction Dashboards and Reports

About Jurisdiction Dashboards and Reports

Only jurisdiction points of contact (POCs) with a dashboard license can access these dashboards.

Jurisdiction dashboards and reports allow jurisdiction POCs to view, sort, and filter data from clinics across their jurisdiction. They include data on:

- Doses Administered
- Registration
- Inventory
- Appointments

Accessing Jurisdiction Data Reporting Dashboards

From your VAMS Jurisdiction Portal home page, navigate to the **Jurisdiction Data** tab. Click **View All Dashboards** at the bottom of the page to view all the dashboards and reports that are available for your jurisdiction.

You can navigate through dashboards by clicking the different tabs at the top of your screen. Once at each dashboard, scroll down to review the reports included.

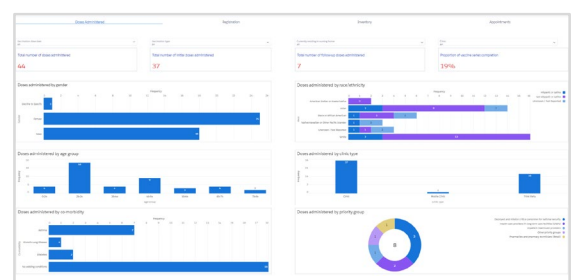
Types of Dashboards: Doses Administered

The Doses Administered dashboard includes the following **reports**:

- Total number of doses administered
- Total number of initial doses administered
- Total number of follow-up doses administered
- Proportion of vaccine series completion
- Doses administered by gender
- Doses administered by race/ethnicity
- Doses administered by age group
- Doses administered by clinic type
- Doses administered by co-morbidity
- Doses administered by priority group

Doses Administered reports can be **filtered** by:

- Vaccination dose date (e.g., all, before/after/between dates, relative dates)
- Vaccination type (e.g., all, Pfizer-BioNTech, Moderna, etc.)
- Currently residing in nursing home (yes/no)
- Clinic (e.g., all, Jefferson Clinic, Main St. Clinic, etc.)



Jurisdiction Data Reporting *(continued)*

Types of Dashboards: Registration

The Registration dashboard includes the following **reports**:

- Total number of organizations registered
- Total number of recipients that were notified
- Total number of recipients registered
- Total number of organizations with enrollments
- Total number of activated clinics
- Total number of deactivated clinics

Registration reports cannot be **filtered**.



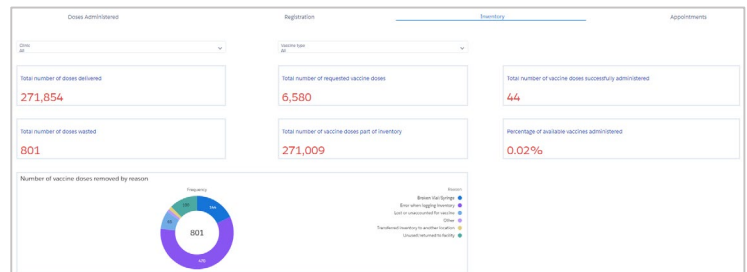
Types of Dashboards: Inventory

The Inventory dashboard includes the following **reports**:

- Total number of doses delivered
- Total number of requested vaccine doses
- Total number of vaccine doses successfully administered
- Total number of doses wasted
- Total number of vaccine doses part of inventory
- Percentage of available vaccines administered
- Number of vaccine doses wasted by reason

Inventory reports can be **filtered** by:

- Clinic (e.g., all, Jefferson Clinic, Main St. Clinic, etc.)
- Vaccination type (e.g., all, Pfizer-BioNTech, Moderna, Johnson & Johnson Janssen.)



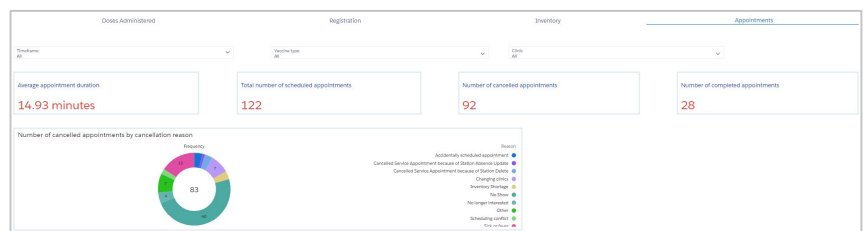
Types of Dashboards: Appointments

The Appointments dashboard includes the following **reports**:

- Average appointment duration
- Total number of scheduled appointments
- Number of cancelled appointments
- Number of completed appointments
- Number of cancelled appointments by cancellation reason

Appointment reports can be **filtered** by:

- Clinic (e.g., all, Jefferson Clinic, Main St. Clinic, etc.)
- Vaccination type (e.g., all, Pfizer-BioNTech, Moderna, etc.)

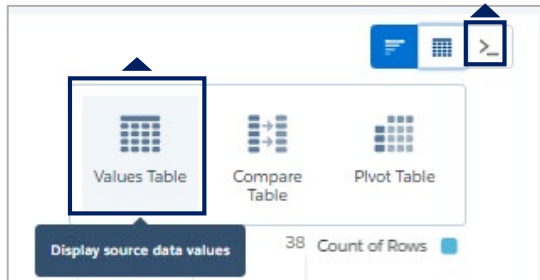


Jurisdiction Data Reporting *(continued)*

Types of Dashboards: Einstein Reports

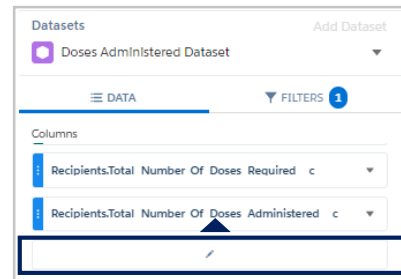
The Einstein dashboard includes:

- The same reports discussed in previous dashboards
- Additional ways to tailor and export the data



Einstein reports can be **customized** by using the Explore feature.

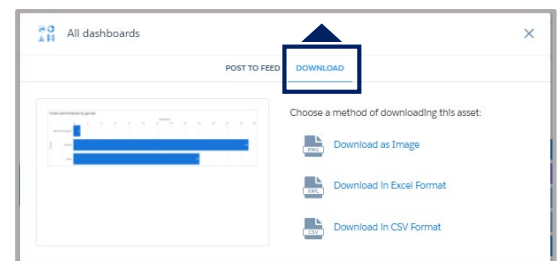
- Once in Explore, click **Table Mode**, then Values Table
- Default values are shown on the left. Scroll down and click the pencil icon to add additional values.



Downloading Reports

You can download select VAMS reports as images, Excel workbooks, or CSV files.

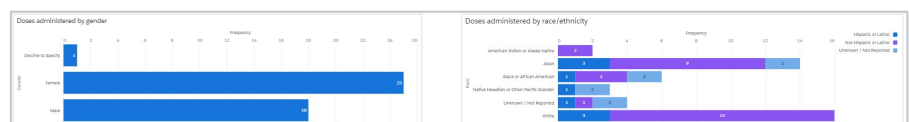
- Hover your mouse over a report to see if it is downloadable. If a small arrow appears in the corner of the report, you can click the **arrow**, click **Share**, then navigate to the **Download** tab to view your download options.



You can **modify** select dashboards by clicking on data within certain reports.

- For example, from the Doses Administered dashboard, clicking on the Female bar in the Doses Administered by Gender report will update the rest of the reports on the dashboard to only show information for females in your jurisdiction.

View before:



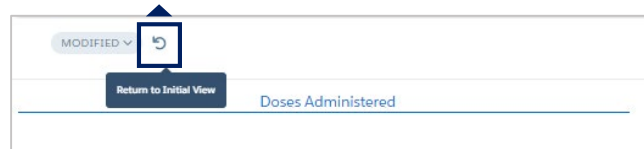
View after clicking the Female bar (highlighted):



Jurisdiction Data Reporting *(continued)*

Downloading Reports *(continued)*

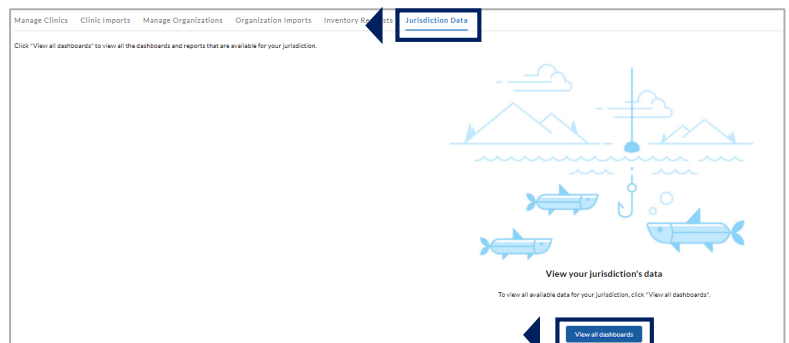
You can revert to your original view by clicking the **circular arrow** next to the **Modified** button in the top left corner of the screen.



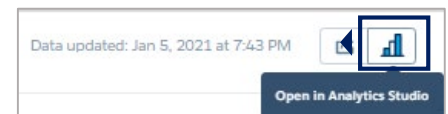
You can print reports using your internet browser's print options or once downloaded to your device.

Exporting Einstein Reports

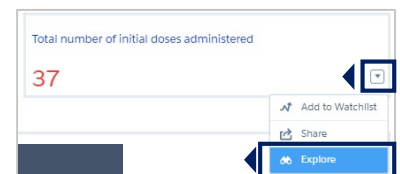
- On the **Jurisdiction Data** tab, click **View All Dashboards**.



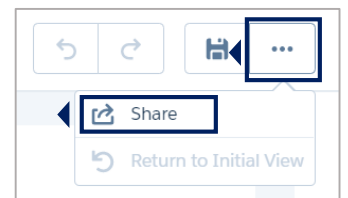
- In the upper right corner, click on the **Open in Analytics Studio** icon.



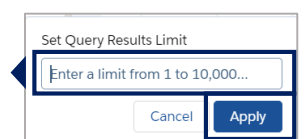
- Once redirected, hover over a dataset until you see the **drop-down arrow**. Click the **arrow**, then select **Explore**.



- Once inside the Explore lens, you can sort the data as desired. Export the data by clicking the **three dots** in the upper right corner, then click **Share**. In the pop-up window, select the **Download** tab to choose a download format (image, Excel, or CSV).



- The lens defaults to a limit of 100 records. To increase this count, increase the Query Limit by scrolling down in the left-hand section of the lens and select **Edit** under Query Limit Default. Enter 10,000 and click **Apply**.





Jurisdiction Data Reporting *(continued)*

Filtering and Modifying Dashboards

Select dashboards can be filtered using the dropdowns at the top of the screen. If a dashboard cannot be filtered, it will not have dropdowns.

Select reports can be downloaded as images, Excel workbooks, or .csv files.

- Hover your mouse over a report to see if it is downloadable.
- If a small arrow appears in the corner of the report, you can click the **arrow**, click **Share**, then navigate to the Download tab to view your download options.

Select dashboards can be modified by clicking on data within certain reports.

- For example, from the Doses Administered dashboard, clicking the **25-34 age group** in the Doses administered by age group report will update the rest of the reports on the dashboard to only show information for that age group in your jurisdiction.
- You can revert to your original view by clicking the circular arrow next to the **Modified** button in the top left corner of the screen.

Section 7

Enable Recipient Registration for Jurisdiction and Clinic Staff

This section shows you how to complete the specific tasks you need to do so that you, other jurisdiction staff, and clinic staff can register as recipients in VAMS.

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

Enable Recipient Registration in VAMS for Jurisdiction Staff

Add Jurisdiction as an Organization

Add your jurisdiction as an organization in VAMS.

Register Jurisdiction as an Organization

Register your jurisdiction as an organization to gain access to the Organization Portal.

Add Jurisdiction Staff as Organization Members

Add jurisdiction staff as organization members one at a time or through bulk upload so they can register to become eligible to receive COVID-19 vaccination.

Register as a Recipient

Register as a recipient in VAMS to become eligible to receive COVID-19 vaccination.

Enable Recipient Registration in VAMS for Clinic Staff

Add Clinics as Organizations

Add clinics as organizations in VAMS so clinic staff can become eligible to receive COVID-19 vaccination.



Add Jurisdiction as an Organization

Multi-Portal Users in VAMS

VAMS users can perform tasks in multiple portals if they become multi-portal users. You will need this multi-portal user access for you and your staff to receive COVID-19 vaccination.

Multi-portal users use the same email address and password to log into VAMS for every user role they have. However, once logged in, they have multiple portals to select from depending on what they want to do in the system.

To better explain this functionality in VAMS, let's make you a multi-portal user.

Add Your Jurisdiction as an Organization

For you and other staff in your jurisdiction to become eligible to receive COVID-19 vaccination, **your jurisdiction must be added in VAMS as an organization**. Once added as an organization, add yourself and jurisdiction staff as members of that organization. Then, members will receive emails to register as vaccine recipients.

To add your jurisdiction as an organization in VAMS, you will follow a similar process as what is described in [Step 2](#) in Section 1 of this user manual. However, there are a few adjustments to the process, as explained below.

- Within the Jurisdiction Portal, click the **Manage Organizations** tab.
- Click **Add Organization** to access the Register Organization page.
- Enter **yourself as the organization coordinator** using the **same email address** you use to log into VAMS as a jurisdiction POC. Click **Next**.

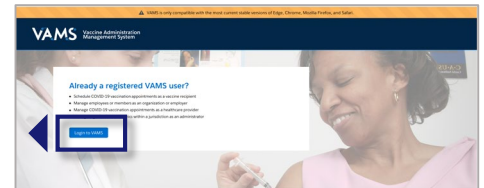
Quick Tip: Name your organization to match your jurisdiction (e.g., State of Georgia) to prevent confusion from jurisdiction employees receiving a VAMS recipient registration email.

- Enter your organization's (jurisdiction's) **information** (address, phone number, etc.). Click **Next**.
- **Review** all information entered in the Register Organization pages and **verify** everything is correct. If so, click **Next**. If not, click **Previous** to make corrections.

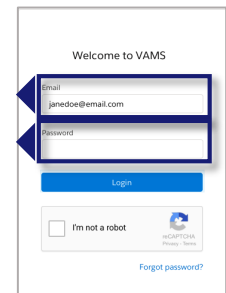
Register Jurisdiction as an Organization

After clicking Next, a message will appear confirming the organization is created in the system. You will then receive an **email notification** from vams@cdc.gov with a **link to register** your organization in VAMS.

- 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**.
- Click **Login to VAMS**.



- Enter the **email address** you use for your jurisdiction login. This should be the same email you entered for yourself as the organization coordinator.
- Enter the **same password** you use when logging in as a jurisdiction POC, complete the **reCAPTCHA**, then click **Login**.



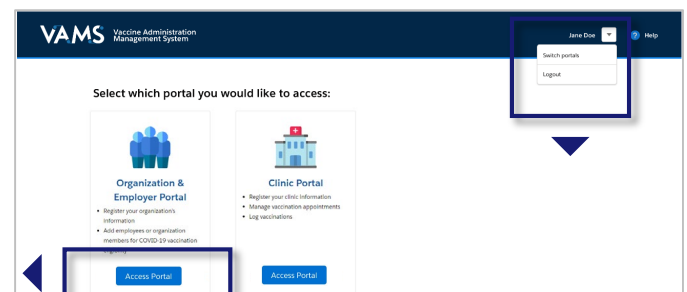
NOTE: You must use the same email address and password to log into VAMS for every user role you hold.

- After logging in, you will be taken to the **Portal Selection** screen where you now have two portals to choose from: the Jurisdiction Portal and the Organization Portal.

You are now officially a multi-portal user!

- Click **Access Portal** below the Organization Portal to complete the registration of your jurisdiction's organization.

NOTE: Use the **Jurisdiction Portal** for your role as the jurisdiction POC and the **Organization Portal** for the new organization account you just registered for your jurisdiction.



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**.



Register Jurisdiction as an Organization

(continued)

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

- **Verify** the information entered for the jurisdiction is correct and click **Next**.

- Enter additional required information about your jurisdiction (if applicable) in the **Organization Information** page. Click **Next**.

- **Review** all of your jurisdiction'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 jurisdiction organization by clicking **Add Coordinator** at the top right of the screen. Note that, once added, coordinators cannot be removed.

Add Jurisdiction Staff as Organization Members

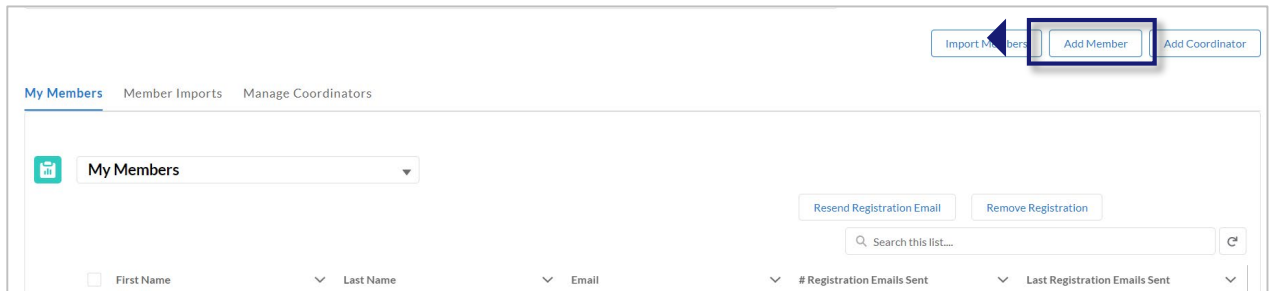
Add Jurisdiction Organization Members in VAMS One At a Time

We use the term “member” in VAMS to signify any person added by an organization in VAMS for COVID-19 vaccination.

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

There are **two ways to add members** so they can be vaccinated: one at a time or via bulk upload by importing a list of names. First, we’ll learn how to add members one at a time, then how to bulk upload them.

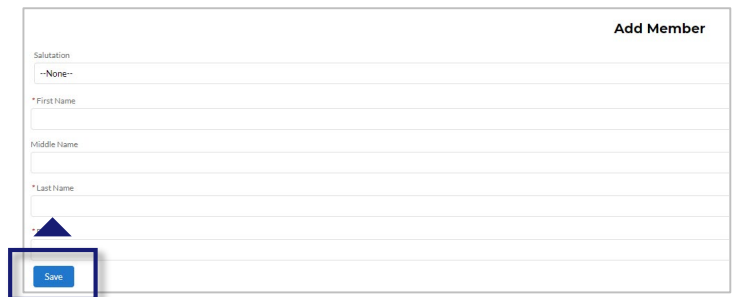
- Click **Add Member** in the **My Members** tab.



- Enter the member’s first and last name and email address. Click **Save**.

Note the following field requirements:

- First name is limited to 80 characters
- Last name is limited to 80 characters
- Email address must contain an "@" sign and valid domain (.com, .gov, etc.) or an error message will appear.
- If the email address you entered already exists in VAMS, you will receive an error message that states, “A member with this email already exists.”

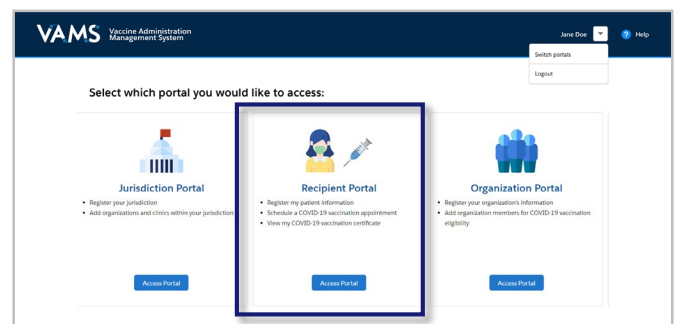


Fields marked with a red asterisk (*) are required.

After adding a member in VAMS, a **registration email** is sent to them from no-reply@envelope.mail.vams.cdc.gov with a **link** to register their account.

Quick Tip: Don’t forget to add yourself as a member! Use the same email address you use to log in as a jurisdiction POC and organization coordinator.

Follow the process outlined in [Register as a Recipient](#). Once registered, you will have access to three portals: Jurisdiction, Organization, and Recipient.



Add Jurisdiction Staff as Organization Members *(continued)*

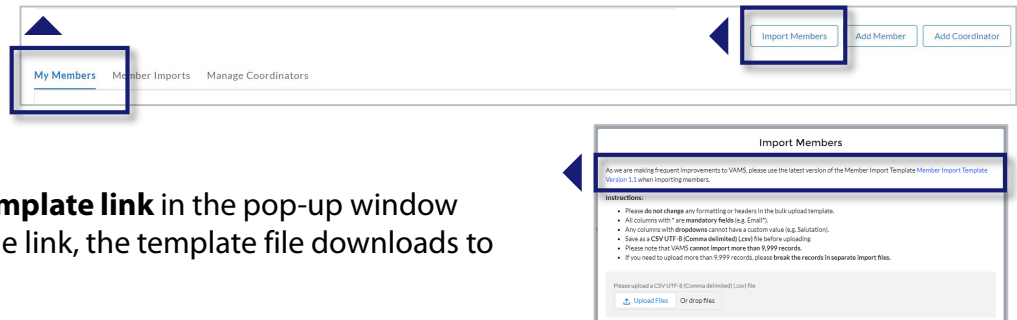
Add Jurisdiction Members in VAMS via Bulk Upload

You can add multiple members in VAMS at one time with bulk upload.

➤ Click the **My Members** tab.

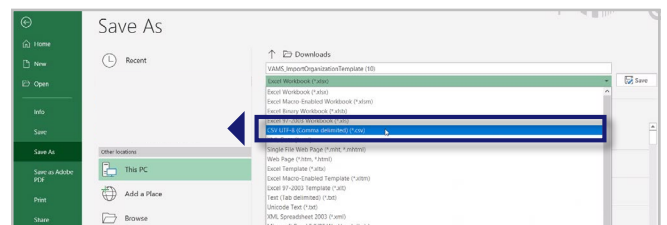
➤ Click **Import Members** in the top right corner of the page.

➤ Click the **Member Import Template** link in the pop-up window that appears. After clicking the link, the template file downloads to your computer.



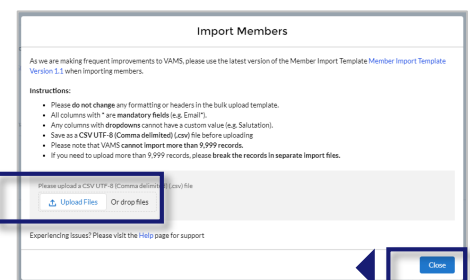
Important Notes About the Member Import Template File:

- The file opens on your computer as an .xlsx file, but you must save it as a **CSV UTF-8 (Comma delimited) (.csv)** file **after** entering all information and **before** uploading it to VAMS. No other types of csv files are accepted.
- You must use the latest version of the import template when uploading a list of members in VAMS. Please ensure you download and use the latest version of the import template each time you attempt to bulk upload members in VAMS to take advantage of constant improvements and to avoid data issues/inconsistencies.
- All fields within the template that are marked with an asterisk are required.
- VAMS will not upload a member if any of the required fields are blank.
- VAMS will not upload duplicates if someone is listed in the csv file multiple times or has already been added in VAMS.
- After inputting member information and saving the Member Import Template as a CSV UTF-8 file, you should close the file and immediately upload it into VAMS. Do not reopen the file on your computer between conversion and upload. In some cases, reopening the file after saving as a CSV UTF-8 file could alter field properties and cause the recipient upload to fail.



NOTE: A comma separated values (csv) file is a plain text file that contains a list of data. These files are often used for exchanging data between different applications.

- Open the file and **enter your members' information**.
- Save the file as a **CSV UTF-8 (Comma delimited) (.csv)** file. You can find this option under the **Save As** drop-down menu in Excel.
- In the Import Member List pop-up window, click **Upload Files** or drag and drop your member list in the **Drop Files** area of the page.
- Click **Close**.



Add Jurisdiction Staff as Organization Members *(continued)*

Confirm Bulk Upload

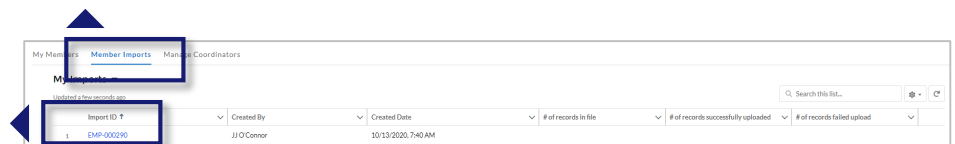
Once you have imported a list of members, the following processes will occur in VAMS:

- A **message will appear** on screen that your list is in the import queue.
- VAMS will send a **registration email** from vams@cdc.gov to each member if their information was entered in the csv file completely.
- After your list has fully processed, you will receive an email from **vams@cdc.gov**, stating that it has been uploaded. Depending on the size of the import file, your member list may not upload immediately.
- A **Result Log for Bulk Upload** file will appear in the Member Imports tab. This file will show you all the members added to the system and explain why some may not be added. See the instructions below to view the Result Log for Bulk Upload file.

➤ Click the **Member Imports** tab to check the results of your bulk upload.

- The **Member Imports** tab shows information about your uploads including the system-generated Import ID number, who imported the list, and when it was imported.

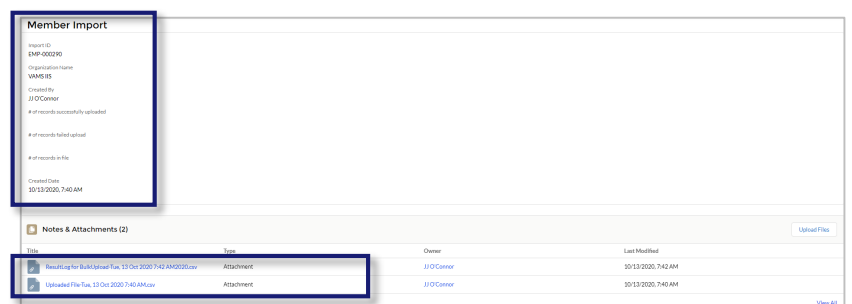
➤ Click the **Import ID** number of the member import to open the Import Details page.



Import ID	Created By	Created Date	# of records in file	# of records successfully uploaded	# of records failed upload
1 EMP-000290	JJ O'Connor	10/13/2020, 7:40 AM			

- Below the Member Import details is the **Notes and Attachments** table. This includes two files: a **Result Log for Bulk Upload** and the **member import** file you uploaded.

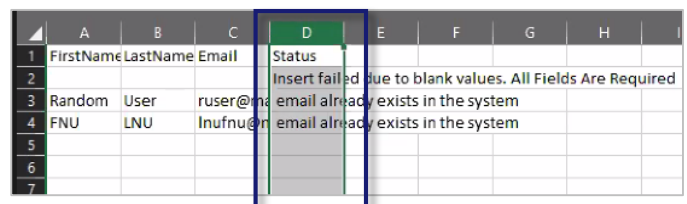
➤ Click the **Result Log for Bulk Upload** link to open the file.



Title	Type	Owner	Last Modified
ResultLog for BulkUpload File, 13 Oct 2020 7:42 AM	Attachment	JJ O'Connor	10/13/2020, 7:42 AM
Uploaded File File, 13 Oct 2020 7:40 AM	Attachment	JJ O'Connor	10/13/2020, 7:40 AM

➤ Scroll to the right until you see the **status column**. This column indicates whether a member was added in the system.

- If there were duplicates or missing information, you will see an **error message** saying why a member was not uploaded in VAMS.
- All members who have a status of **Success** have been uploaded in the system. Members whose statuses include an error message have not been uploaded in the system.



	A	B	C	D	E	F	G	H	I
1	FirstName	LastName	Email	Status					
2				Insert failed due to blank values. All Fields Are Required					
3	Random	User	ruser@n	email already exists in the system					
4	FNU	LNU	Inufnu@n	email already exists in the system					
5									
6									
7									



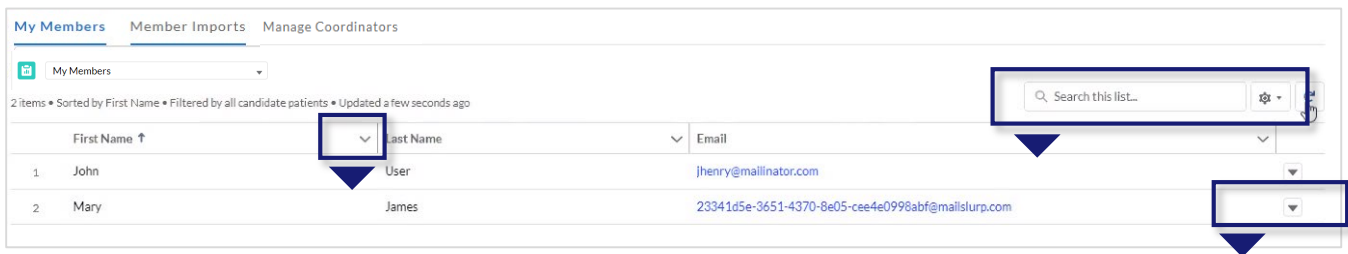
Add Jurisdiction Staff as Organization Members *(continued)*

View Member List and Search

View a comprehensive list of jurisdiction members entered in VAMS by clicking the **My Members** tab. You can also search for a particular member on this tab (see below).

The default view on this tab is an abbreviated list of all members added in VAMS. To view them all, click the **View All** link at the bottom of the list.

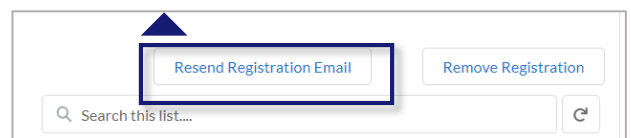
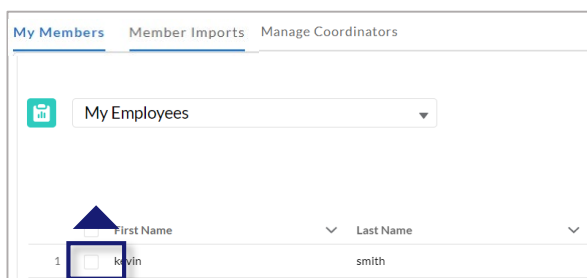
There are multiple ways to search for members on the **My Members** tab.



- You can search by clicking the **arrows** in the columns to sort them by the column headers (e.g., first name, email, etc.).
- You can also use the **search bar** to enter information such as first name, last name, or email.

Resend Member Registration Email

- From the **My Members** tab, select the **checkbox** next to the names of the members you want to resend the registration email to, then click **Resend Registration Email** at the top right of the screen.



NOTES:

- You can only resend the email one time per hour.
- You can only resend a registration email a maximum of five times per individual.
- You cannot resend a registration email to an individual who has already registered their VAMS account.



Add Jurisdiction Staff as Organization Members *(continued)*

Edit Member Information

You can edit **first name**, **last name**, and **email address** for individuals in your organization after uploading them to your organization in VAMS.

- From the My Members tab, hover your mouse over the name or email address you want to edit.
- Click the **pencil icon** on the right side of the cell.
- Enter the updated information, then click **enter**.
- The updated information will then be highlighted yellow to confirm it has been updated.

	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name
1	Kevin	Smith

NOTES:

- You cannot change the information of an individual who has already registered their VAMS account.
- The recipient can edit their own first name and last name during the recipient registration process and once their account is registered.
- Recipients cannot change their email address.

Remove Members

You can **remove** members from your organization after uploading them to your organization in VAMS.

- From the My Members tab, select the **checkbox** next to the names of the members you wish to remove from your organization.
- After ensuring the boxes are checked, click **Remove Registration** on the right side of the page.
- You will then see a success message on the top of the screen confirming the employees were removed.

	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name
1	<input checked="" type="checkbox"/> kevin	smith

Resend Registration Email	Remove Registration
<input type="text" value="Search this list..."/>	

NOTES:

- You cannot remove members after they have registered their account.
- 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.

Register as a Recipient

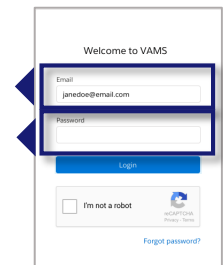
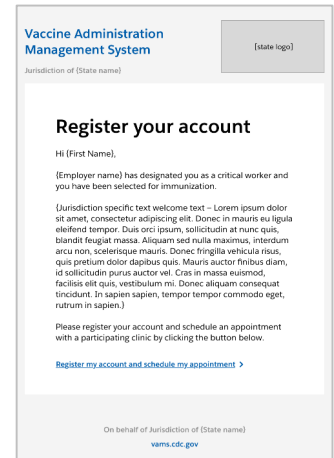
After you're added as a member in VAMS, a registration email is sent to you from vams@cdc.gov with a link to register as a COVID-19 vaccine recipient.

- If you're 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 the recipient **email notification** you received and click the **link** to register your account.

Quick Tip: If this email is not in your inbox, you may need to check your junk or spam mail folders.

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

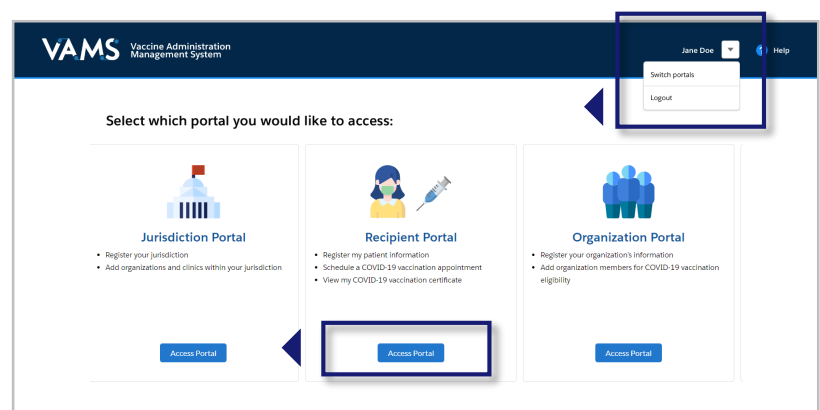
NOTE: Every time you log into VAMS, you must verify your identity by entering your password, and a number you receive via email or SMS, depending on the preferred contact method you choose (two-factor authentication process). After five log-in attempt failures, you will be locked out of the system for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



After logging in, you will be taken to the **Portal Selection** page where you now have multiple portals to choose from including Jurisdiction, Organization, and Recipient.

- 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 and selecting **Switch Portals**.



Add Clinics as Organizations

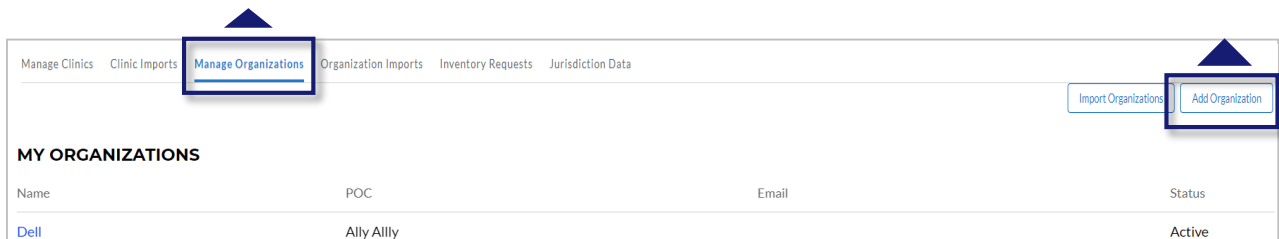
A vaccination clinic must register as an organization in VAMS for their staff to be eligible to receive COVID-19 vaccination.

Add a clinic as an organization if requested to do so by the clinic administrator. The clinic administrator can be the organization coordinator or they can **select a delegate** from the clinic to be this coordinator. Whether they fill the role themselves or choose a delegate, they **must** provide you with the organization coordinator's first and last name and the email address the coordinator currently uses 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 the clinic's organization coordinator with a link to register their organization.

You can **add a clinic as an organization** in VAMS the same way you add other organizations.

- Within the Jurisdiction Portal, Click the **Manage Organizations** tab.
- Click **Add Organization** to get to the Register Organization page.



- Enter the coordinator's contact information. Be sure to use the **same email address** the coordinator uses to log into VAMS in their normal role. Click **Next**.

Quick Tip: Naming the organization to match the name of the clinic is helpful in preventing duplications.

- Enter all **required information** on the Register Organization pages (e.g., Organization POC, Organization Information).

- Review all information on the Register Organization pages and **verify** everything is correct. If so, click **Next**. If not, click **Previous** to return to make corrections.

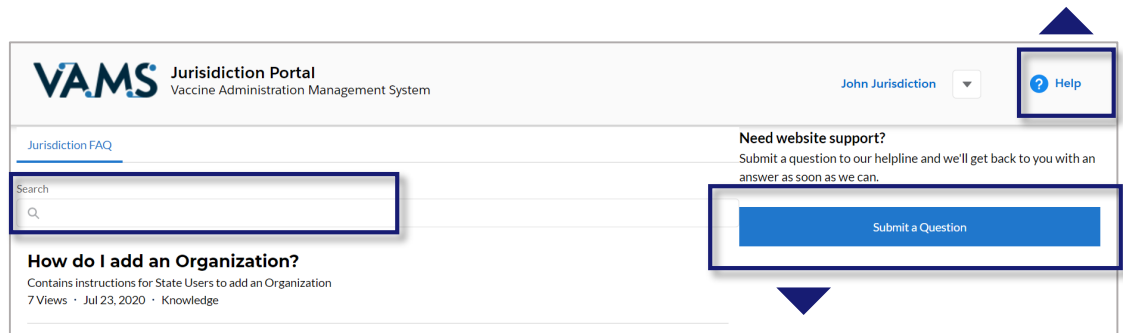
Access Support

Where to Find Additional VAMS Resources and Information

Help Page

The **Help** page has answers to frequently asked questions (FAQs) about the Jurisdiction 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 Jurisdiction 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
.csv	A comma-separated values (CSV) file is a delimited text file that uses a comma to separate values.
Contact Center Agent	Individuals added by the jurisdiction points of contact who can schedule recipient appointments using the Schedule Recipients tab.
Contact Center Manager	Jurisdiction points of contact who can add agents to their jurisdiction's contact center using the Manager Users tab in the Jurisdiction Portal.
Organization	Any institution, association, company, or other group that identifies and adds members (individuals eligible for COVID-19 vaccine) in VAMS.
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-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).
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	Vaccination clinic responsible for both adding and managing recipient records as well as administering and tracking recipient vaccination in VAMS.
Vaccination Clinic	A clinic providing COVID-19 vaccination. Sometimes referred to as "vaccine clinic" in VAMS and this user manual.