VAMS Standard, Pop-up and Mobile Clinic Guidance

If you are currently enrolled as any type of Clinic in VAMS and would like to add an alternative Clinic Type, please complete the **Additional VAMS Clinics Request Form** and submit to DPH through the following link **https://dph-cthelpdesk.ct.gov/Ticket**.

Step by Step Instructions for setting up each Standard, Pop-up or Mobile Clinic

1. **Activate your account (if you already have a VAMS account, skip to Step 2)**
   a. Find your registration email from VAMS@cdc.gov. Click the registration link.
   b. Verify your information. Change information if needed.
   c. Create a password.
   d. Confirm your information as the clinic POC and your clinic's information.

2. **Add clinic staff as VAMS users**
   a. Log in to your VAMS account
   b. In your desired **Clinic Portal**, click the **Manage Users** tab
   c. Click **New**
   d. Enter the email address of the person you are adding to your clinic
   e. Select the appropriate user role(s)
   f. Repeat for all clinic users
   g. Each user should receive an email from VAMS to activate their account.

3. **Log Inventory (For users with the Clinic Administrator role or Inventory Manager role)**
   a. Click the **Inventory Management** tab
   b. Click **Manually Log Inventory**
   c. Select the Manufacturer from the drop-down menu (ex. Pfizer, Moderna, Johnson & Johnson)
   d. Click the **Product** field. The Product will pre-populate
   e. Click the **UoS NDC** field. The UoS NDC will pre-populate. Note: This number will not match the NDC number on the vial. That is okay.
   f. Enter the UoS Lot Number and UoU Lot Number. This number is the same for both fields and is printed on both the vial and the packaging.
   g. Enter the number of **vials** you received
   h. Enter the expiration date.
      - For Pfizer, this date is printed on the vial.
      - For Moderna, the expiration date is NOT written on the vial. You can look up the expiration by entering the lot number on https://www.modernatx.com/covid19vaccine-eua/providers/vial-lookup.
      - For Johnson and Johnson, the expiration date is NOT printed on the vaccine vial or carton. You can scan the QR code on the outer carton, call 1-800-565-4008, or visit www.vaxcheck.jnj.

4. Set up your Clinic Schedule

Part 1: Clinic Details

a. Click the **Clinic Details** tab
b. Click the **Edit** button located at the top left of the page
c. Select an appointment duration from the drop-down menu, then click **Save**.
    i. The appointment duration indicates the number of slots per hour.
    ii. This must be set in order for appointments to be visible.
d. If you change the appointment duration after your clinic is set up and appointments are scheduled, you could have more appointment slots booked (decreasing time slot duration) or cancelled (increasing time slots).
e. Set the Appointment Rules:
    i. Limit appointment availability (optional – must be between 35 and 365 days)
    ii. Type in a Start Time and the Duration (Hours) from the drop-down.
    iii. Allow Jurisdiction Contact Centers to ignore reservation tiers when scheduling – radio button.
f. Click **Save** at the top of the page.

Part 2: Clinic Setup

a. Click the **Clinic Setup** tab
b. Click the blue link of the clinic's name in the **Clinic Locations** table
    i. During clinic set up when a step is complete there will be a green check mark next to: *Appointment duration*, *Clinic operating hours*, *Treatment stations*, and *Location end date*.
    ii. When all steps are complete there will be a green check mark next to *Ready for operation*
c. Click the **Edit** button
d. Complete the following fields by clicking the checkbox(es):
    i. **Restrict scheduling groups**
    ii. **Vaccine products carried (optional)**- these selections appear on the **Find a Clinic** screen and **Appointment Review** screen for recipients prior to booking their appointments and this will not prevent a recipient from scheduling with a clinic that does not have the corresponding vaccine product in their inventory.
e. Enter a date in the **End Date** field. When a clinic end date is not entered, the system will default to set an end date 365 days in the future.
   Note: The **Available for Scheduling?** box will automatically be checked. If you would like to prevent recipients from scheduling until your clinic is fully set up, uncheck the box. Do not forget to go back and check the box again when your setup is complete.
f. Click **Save**
g. Click **Add Appointment Messaging** button**.** Messages typed into the text box will be visible on the appointment confirmation page.
h. Click **Save**
i. Click **Setup Operating Name and Operation Hours** at the bottom of the page.

    i. The **Clinic Operating** hours are the overall hours your clinic is available, not the appointment slots available.

j. Name your operating hours by clicking the pencil icon to the right of the field. The name can be whatever you want and will not be seen by any vaccine recipients.
k. Click the **Operating Hours** tab
l. Click **New** in the **Clinic Operating Time Slots** box
m. Select a day of the week and the start and end times for that day. **Tip: select the earliest and latest times that you could possibly be vaccinating.** Click **Save and New**. Repeat until all time slots are set for each day your clinic is open.
    i. Treatment stations cannot be set up with hours outside of the Clinic Operating hours.

Part 3: Add Treatment (Vaccination) Stations

Note: Your treatment station(s) determine the time slots available for recipients to schedule appointments. Your treatment stations could equal the number of vaccinators you have or the number of doses you are able to provide.

Scenario 1: You have **1 treatment station** from 8 AM – 5 PM, with an appointment duration of 20 minutes. This means a total of 24 appointment time slots will be available for scheduling on that day (3 appointments an hour times 8 hours.)

Scenario 2: You have **2 treatment stations** with the same operating hours and appointment duration. This means a total of 48 time slots will be available on that day (6 appointments per hour times 8 hours)

- In Scenario 1, if a recipient schedules an appointment for 2 pm, they have taken the only 2 pm time slot for that day because there is only one treatment station open at that time. No other recipients can select the 2 pm time slot on that day.
- In Scenario 2, the 2 pm time slot will be available for 2 recipients to schedule an appointment because there are 2 treatment stations open at that time on that day.
- You can also add Treatment Station Absences to block certain times of the clinic.

a. Click **VAMS Clinic Portal** on the top left of the screen to get back to the main page
b. Click the **Treatment Stations** tab
c. Click **New**
d. Select your clinic's name in the **Clinic** field
e. Enter the name of your treatment station (If you are having a clinic for just one day, it is recommended to name your treatment station with the month and day of the clinic and then a number after it (Jan 14th station 1))
    a. For Mobile clinics, if you are having multiple locations with different days and times, you need to set up separate treatment stations for each clinic with the date of the clinic in the name of the treatment station. This will avoid confusion and incorrect appointment slots for each location.
f. Select the start and end dates (i.e., the dates you want this station to be available for recipients) for your treatment station.

g. Click the **Station Operating Hours** field. For the first treatment station you create, select **New Station Operating Hours**. If you create multiple treatment stations, you will be able to select new station operating hours for each station.
h. Name the operating hours for the treatment station and click **Save**
i. Enter the treatment station details and click **Save**. You will be taken to that treatment station details page.
j. Click the name of the operating hours for the treatment station at the bottom of the page
k. Click the **Station Operating Hours** tab
l. Click **New**
m. Select the day of the week and a start and end time. **Tip: only enter the block(s) of time in which you want recipients to schedule.** Click "Save and New". Repeat for all days of the week which this treatment station will be active.
   Note: You can add as many treatment stations as you need.
   Remember to check the **Available for Scheduling** checkbox when you are ready to have the clinic available to VAMS users.

5. Check-in Recipients (For users with Front Desk Role)

Checking in recipients who have scheduled an appointment at your clinic:

a. On the **Recipient Check-In** tab, locate the name of the recipient who you are checking in. Click **Check-in Recipient**.
b. If the recipient has completed their Prevaccination Questionnaire, the **Validate Recipient** screen will appear. Skip to Step e.
c. If the recipient has not completed their Prevaccination Questionnaire, you will be directed to a screen that states "Recipient has not completed the Prevaccination Questionnaire".
d. Select whether the recipient will log into their VAMS account and complete the Prevaccination Questionnaire on their own or select that the healthcare provider will complete the pre-vaccination questionnaire with the recipient at the beginning of the appointment.
   - If you select the first option, ask the recipient to step to the side while they log in to their VAMS account and complete the questionnaire. Once complete, repeat the check-in steps again.
   - If you select the second option, you will be directed to the Validate Recipient page
e. On the **Validate Recipient** page, select the form of identification used to verify the recipient. If ID is not required for your clinic, select **No ID required for this clinic**. Click **Next**. The recipient is now checked in for their appointment.

Checking in recipients who do not have a scheduled appointment at your clinic (walk-ins):

a. On the **Recipient Check-in** page, click the **Search for existing recipient** hyperlink
b. There are two ways to search for a recipient in VAMS.
   - Enter **ONE** of the following: Email address, VAMS system ID or External system ID of the walk-in recipient
     OR
   - Enter **All** of the following: First name, Last name, Date of birth and Gender

   If you see the message "*We couldn't find who you were looking for. Try new search criteria or click the Add new recipient button to create a new recipient record*", it means VAMS did not find a recipient that matches the recipient information you entered. If you are certain that the recipient information was correctly entered, go to next step (c), or try a new search. Click the **Add new recipient** button

c. Complete the **Demographic Information**, **Contact Information** and **Emergency Contact** fields on the **Recipient Information** page. * indicates that the field is required. Click **Next** to go to the **Insurance** page
d. The insurance information is not mandatory. If the recipient provides you with their health insurance information, you can enter it on this page. Click **Next** to go to the **Review** page.
e. Review the information with the recipient to verify you have collected and entered it correctly. If you need to make corrections click the **Previous** button at the bottom of the page and navigate back to the Recipient Information page. At the bottom of the page, click the box next to "By checking this box, I confirm I have reviewed the above information with the recipient and it is accurate." Click **Finish** The recipient has now been created in VAMS
f. To schedule the recipient to be seen immediately, click on **Schedule walk-in**
    i. If no prior doses are recorded in VAMS, the system will ask if the recipient received a prior dose. If the answer is yes, the vaccine manufacturer and date the recipient received the dose must be entered.
    ii. VAMS will alert you if the recipient received a first dose and is not yet due for their second dose. The system will ask, "Are you sure you want to vaccinate early?" Select **Continue** to proceed with scheduling the walk-in or **Cancel** to cancel scheduling the appointment.
g. The page will display if the recipient has a scheduled appointment or not, it also displays the recipient's name and date of birth. Click the **Schedule Walk-in** button
h. Walk-in recipient now has an appointment scheduled at your clinic. Their name will appear on the **Recipient Check-In** tab in the appointment table. Follow the steps above for **Checking in recipients who have scheduled an appointment at your clinic.**

Editing Recipient Records upon Check-In (for recipients who do not already have a VAMS account)
Standard and mobile clinic front desk staff can edit records for recipients who do not already have a VAMS account and who have not completed their vaccination schedule. If a registered recipient needs to edit their record, they can do so in their Recipient Portal.

a. On the **Recipient Check-in** page, click the "Search for existing recipient" hyperlink
b. Once the correct recipient is found, click their name in the search results table to be taken to the **Recipient Information** page.
c. Click the **Edit** button to make any necessary changes to the recipient record.
d. Click **Save**.

6. Logging Vaccinations (For users with the Healthcare Professional role)

a. On the **Manage Appointments** tab, click the name of the recipient whose vaccination you are logging
b. Click **Yes** to verify that this is the correct recipient
c. If the recipient has not yet completed the pre-vaccination questionnaire, click **Start pre-vaccination questionnaire**. Complete the pre-vaccination questionnaire with the recipient.

d. Review the information on the **Pre-vaccination Questionnaire**, **Recipient Details**, and **Medical Information** tabs to determine if the recipient should receive the vaccine.
e. On the **Vaccine Administration** tab, click **Log Vaccination**.
f. Respond to the questions as they appear. New questions will appear based on prior responses.
g. Click **Log Vaccine**.
h. Review the information on the **Review vaccination details** page.
    i. Click **Previous** if corrections are needed; or
    ii. **Submit** if the information is correct.