

Recipient Search Prior to Adding New Individual

To reduce duplicate records in VAMS, clinic users should complete a thorough search for the individual prior to adding them as a new recipient. In **VAMS**, a registered recipient's Username is either their email address or cell phone number. Registered recipients and individuals enrolled in **VAMS** without completing a registration, i.e. Third Party Clinic recipients or individuals without an email or cell phone number, can be searched by using their first name, last name and date of birth. The individual's full legal name should be entered into VAMS. If the individual has an ID, the name on the ID should be used to create the record.

When a clinic chooses **Add new recipient** from the **Recipient check-in** page, **VAMS** will complete a search for individuals with an exact match of name, date of birth, and zip code or External System ID. If an individual with matching information exists, an error message will appear stating a recipient with the provided name and date of birth and ZIP or External System ID already exists within the system.



Note: CT WiZ allows users to conduct a search with as few as two letters from the patient's first and last name. Results will show all matches meeting the partial search criteria. Therefore, a search should be conducted in CT WiZ, in addition to VAMS for better results.

If a discrepancy is discovered between the CT WiZ record and VAMS, then edits need to be made to the patient record in both CT WiZ and VAMS.

Recipient Search in CT WiZ

To search for an individual, go to the **Patients search** page:

- Conduct a search using as few as two letters of the first and last name of the patient.
- Search results will show all patients in CT WiZ that meet the search criteria.
- If over 25 results are returned for the search criteria, a pop-up message appears. Narrow down the search results by entering the date of birth or additional letters in the first and/or last name.



Note: If a recipient has received a 1st dose at another clinic, the recipient can be looked up in CT WiZ to determine spelling of name and date of birth. This information can be used to search for the recipient in VAMS. If recipient is not in VAMS then use the same spelling of the first and last name when adding the recipient in VAMS. This will match the recipient to the existing record in CT WiZ.

Recipient Search in VAMS

Standard and Mobile Clinic Users

Follow these steps:

Step 1 -- To conduct a search, go to the **Recipient check-in** tab.

Step 2 -- Click **Search for existing recipient** button.

Step 3 -- If the individual has an email, search using recipient's email.

If no result is found, ask the recipient if they have any additional email addresses and complete a search for each email address.

Step 4 -- If the individual has a Cell phone number, search using the recipient's cell phone.

If no result is found ask the recipient if they have additional cell phone numbers and complete a search for each number.

Step 5 -- If no results appear for the email or cell phone number, search by First Name, Last Name and Date of birth.

If no result is found ask the individual if they have nicknames or other names they may have used and complete a search with this information, if given.

If the search criteria matches a VAMS recipient, then their information will appear in the Search results and you can select that individual.

Step 6 -- If you have exhausted all search criteria and no results appear, click the **Add new recipient** button.

Third-Party Clinic users

When a **Third-Party clinic** user bulk uploads recipients, **VAMS** will cross-check them with existing **VAMS** recipients in other clinics.

- If a Third-Party recipient does not exist in VAMS, the system will create a new record for that person in your clinic under the **Manage Recipients** tab.
- If a Third-Party recipient does exist in **VAMS**, they will be added to your clinic and show under the **Other Recipients** tab.
- If a Third-Party recipient was previously removed from your **Third-Party clinic**, they will be reactivated and show under the **Manage Recipients** tab.

For manual recipient entry, follow these steps:

Step 1 -- To conduct a search, go to the **Other recipients** tab.

Step 2 -- Click **Find a recipient** button.

Step 3 -- If the individual has an email, search using recipient's email.

If no result is found, ask the individual if they have additional email addresses and complete a search for each email address.

Step 4 -- If the individual has a Cell phone number, search using the recipient's cell phone.

If no result is found, ask the individual if they have additional cell phone numbers and complete a search for each number.

Step 5 -- If no results appear for the email or cell phone number, search by First Name, Last Name and Date of birth

If no result is found, ask the individual if they have nicknames or other names they may have used and complete a search with this information, if given.

If the search criteria matches a VAMS recipient, then their information will appear in the **Search** results and you can select that individual.

Step 6 -- If you have exhausted all search criteria and no results appear, click **Add Recipient** button.