COVID-19 Vaccine Allocation & Ordering System

VAOS Provider User Training Guide
Updated 1/18/2021
Overview

• Purpose
  • The following slides outline the necessary steps that all COVID-19 Vaccine Providers will follow to access the COVID-19 Vaccine Allocation & Ordering System (VAOS) and perform related responsibilities.
    • VAOS is the system through which Primary and Backup Vaccine Coordinators for approved COVID-19 Vaccine Providers will acknowledge vaccine allocations, confirm received shipments, view distribution information, and report waste.
    • Through VAOS, COVID-19 Vaccine Providers may access the Vaccine Management Dashboard, which provides data about vaccine allocations, distribution supply, and administration metrics.

• Audience
  • COVID-19 Vaccine Providers
**VAOS Tips & Tricks**

*Keep in mind...*

- VAOS works best with **Chrome** as your browser.

- Please **check your Spam** folder for emails from **noreply@salesforce.com** as needed. If possible, flag this address as a safe-sender to avoid emails being sent to Spam.

- Regardless of the number of Providers or facility locations you are associated with, you will have **one set of login credentials**.
As a COVID-19 Vaccine Provider, these are your primary functions in VAOS:

1. **ACCESSING DASHBOARDS**
   Useful for seeing your allocations, distribution supply, and administration metrics.

2. **SUBMITTING ALLOCATION REQUESTS**
   Required to determine the allocations of COVID-19 vaccines your facility will receive.

3. **ACKNOWLEDGING ALLOCATIONS***
   No longer required, if you submitted an allocation request.

4. **CONFIRMING SHIPMENTS***
   Required once you receive your vaccine doses.

5. **REQUESTING TRANSFERS/RETURNS**
   Not required, and should be considered carefully before requesting.

6. **REPORTING WASTE***
   Required to track how many doses are unused/wasted.

The following slides provide an overview of these functions.

* These functions also have instructional videos on the DSHS Provider Resources website located [here](#).
1: Accessing Dashboards
1. You will receive an encrypted email from IdentityManagement@hhsc.state.tx.us

2. The email will need to be decrypted. To **decrypt the email**, click on the message file and choose to open it.

3. You will be redirected to a web browser. From here, click **Use a one-time passcode**.

4. Your **temporary code** will be emailed to you.

5. Enter your one-time code and click **Continue**.
6. Once you click **Continue** the encrypted message will open.

7. The message will contain **your username and a temporary password** for VAOS.

8. Click the link to VAOS to be redirected to the VAOS login page.

9. Use the provided **credentials from the encrypted email** to log in and change the temporary password to a password of your choosing.
10. Once you’ve created your new password, use it to log in to your Provider portal at https://texasvaccines.dshs.Texas.gov

11. On the home page, click **Dashboard**.

12. You may access the dashboards as needed to gain visibility into vaccine distribution for your facility or region.

13. There are 3 views you can navigate through: **Allocation**, **Supply Chain**, and **Administration**.
COVID-19 Vaccine Provider Milestones

The remaining sections address the milestones outlined in yellow.
2: Requesting Vaccine Allocations in VAOS – First Doses
This calendar shows an *example* timeline for vaccine allocation requests and when they might be delivered:

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 1</td>
<td>Day 2</td>
<td>Day 3</td>
<td>Day 4</td>
<td>Day 5</td>
</tr>
<tr>
<td><strong>Submit allocation requests in VAOS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 8</td>
<td>Day 9</td>
<td>Day 10</td>
<td>Day 11</td>
<td>Day 12</td>
</tr>
<tr>
<td><strong>Providers receive allocation notification. Providers do not need to accept the allocation in VAOS.</strong></td>
<td></td>
<td><strong>Deadline to submit weekly request</strong></td>
<td></td>
<td><strong>Hub site orders delivered</strong></td>
</tr>
<tr>
<td>Day 15</td>
<td>Day 16</td>
<td>Day 17</td>
<td>Day 18</td>
<td>Day 19</td>
</tr>
<tr>
<td>Other Provider orders delivered</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Providers will submit allocation requests each week.

Delivery timelines are *estimated* and are subject to change based on vaccine supply and other factors.
Before submitting a first dose allocation request in VAOS, make sure you have this information ready:

- ✓ Type of vaccine requested (Moderna, Pfizer)
  - If Pfizer, do you need dry ice?
  - If Moderna, do you have available refrigerator storage for the requested amount?
- ✓ Number of first doses requested
- ✓ Ancillary supplies requested
- ✓ Populations you plan to vaccinate with this allocation
- ✓ If you want to be available on CDC Vaccine Finder

Submitted allocation requests inform allocation decisions, but do not guarantee that you will receive an allocation for your requested doses due to continued supply limits.
1. Log into VAOS at https://texasvaccines.dshs.texas.gov/ and navigate to the Vaccine Requests and Transfers tab.

2. Click New.
3. If you are requesting an allocation for first doses, select **First Dose Allocation Request**.

4. Click **Next**.
Step 3: Enter First Dose Allocation Information

5. Enter all mandatory information.
   • Note: Submitted allocation requests inform allocation decisions, but do not guarantee that you will receive an allocation for your requested doses due to continued supply limits.

   Check this box if you want to receive ancillary supplies with your order

   Submit the number of first doses you can store and use in a one-week period

6. Click Save.
7. You will receive a pop-up confirmation that the Service Request was created.

8. If you need to validate any information submitted in your allocation request, you can review Service Request information by selecting **VAOS Requests and Transfers** from the VAOS homepage.

*Note: the default here will be Recently Viewed. Select All to see all your service requests.*
2: Requesting Vaccine Allocations in VAOS – Second Doses
This calendar shows an *example* timeline for when COVID-19 Vaccine Providers should request Second Dose allocations and when they might be delivered:

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Dose shipment received</strong> <em>(Pfizer or Moderna)</em></td>
<td>Begin administering <strong>First Doses</strong> <em>(Pfizer or Moderna)</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit allocation request for <strong>Pfizer Second Dose</strong> by <strong>Thursday 5 PM</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Submit allocation request for <strong>Moderna Second Dose</strong> by <strong>Thursday 5 PM</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Second Dose of Pfizer shipment received</strong></td>
<td>Begin <strong>Pfizer Second Dose administration</strong> <em>(Day 21)</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Second Dose of Moderna shipment received</strong></td>
<td>Begin <strong>Moderna Second Dose administration</strong> <em>(Day 28)</em></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Before submitting a second dose allocation request in VAOS, make sure you have this information ready:

- ✓ Type of vaccine requested (Moderna, Pfizer)
  - If Pfizer, do you need dry ice?
  - If Moderna, do you have available refrigerator storage for the requested amount?

- ✓ Number of doses requested

- ✓ Ancillary supplies requested

- ✓ Populations you plan to vaccinate with this allocation

- ✓ If you want to be available on CDC Vaccine Finder

Submitted allocation requests inform allocation decisions, but do not guarantee that you will receive an allocation for your requested doses due to continued supply limits.
Step 1: Navigate to the VAOS Provider Portal

1. Log into VAOS at https://texasvaccines.dshs.texas.gov/ and navigate to the Vaccine Requests and Transfers tab.

2. Click New.
Step 2: Create New Second Dose Vaccine Request

3. If you are requesting an allocation for second doses, select **Second Dose Allocation Request**.
4. Click **Next**.
Step 3: Enter Second Dose Allocation Information

5. Enter all mandatory information. Note that this information is similar to the information you submit for a First Dose allocation request.

Submit the number of second doses you are requesting. You should be able to store and use these second doses in a **one-week period**.

Check this box if you want to receive ancillary supplies with your order.

Check this box if you want the CDC to direct the public to your facility for COVID-19 Vaccines

6. Click **Save**.
7. You will receive a pop-up confirmation that the Service Request was created.

8. If you need to validate any information submitted in your allocation request, you can review Service Request information under **VAOS Requests and Transfers** in the VAOS Dashboard.

Note: the default here will be **Recently Viewed**. **Select All** to see all your service requests.
3: Acknowledging Allocations
1. You will receive an email from noreply@salesforce.com alerting you about an allocation for COVID-19 vaccine. The email will alert you whether your allocation is for your 1st or 2nd doses.
   • **Note:** Regularly check your Spam folder (particularly if you are using Gmail) to ensure that you do not miss any allocation emails.

   Dear Provider,

   You have a First Dose allocation of Pfizer 1 available to accept in the Texas Vaccine Allocation and Ordering System (VAOS) for medical workers at TX Test. This may only be part of your order for the season; if so, the remainder will be allocated as it becomes available. Please review the detailed instructions on the ordering process below.

   It is very important that you go into VAOS [https://texasvaccines.dshs.texas.gov](https://texasvaccines.dshs.texas.gov) as soon as possible once receiving this notification. We request that the listed amounts of COVID Test UAT vaccine that have been allocated be accepted — please do not decrease your weekly allocation unless storage capacity at your facility is an issue.

   Please assure that there will be enough free refrigerator space for the doses you accept and that someone will be available during your scheduled delivery hours to receive this shipment.

2. To view and acknowledge your allocation in VAOS, log in at [https://texasvaccines.dshs.texas.gov](https://texasvaccines.dshs.texas.gov)
3. In VAOS, navigate to the **Accounts** tab. Each of your approved facility locations will be listed as an account.

4. From the drop-down menu, select **All Accounts** to view all your facilities. Select the facility location that will be accepting the allocation.
5. Navigate to the **Vaccine Allocation** box and click **View All**.

6. You will be redirected to **Vaccine Allocations**.
7. Click on the vaccine allocation you want to acknowledge from the list.

8. Click **Accept** on the **Vaccine Allocation** details page.
   - **Note**: **Reject All** should be selected if you cannot accept any of the allocation
   - Make sure you accept your allocation by the indicated **Due Date** to avoid your allocation expiring.
Step 3: Accept Allocation

9. Enter the total allocation amount you want to accept in doses and click **Save**.
   • **Note:** The maximum amount you can accept is the total amount that was allocated to you.

10. The **Vaccine Allocation** details page will now show your allocation status as **Acknowledged** and will reflect the total amount accepted.
Step 4: Log into ImmTrac2

- You MUST login to ImmTrac2 to avoid being disassociated by the system for inactivity.
- If ImmTrac2 users do not to login in immediately or have gone 365 days since your last login, you will not be able to login to ImmTrac2 or VAOS.
- Log into ImmTrac2 [here](#).
- For information about logging into Immtrac2, email: [ImmTrac2@dshs.texas.gov](mailto:ImmTrac2@dshs.texas.gov)
• Wait for an email confirming the shipment of your vaccine doses so that you can go through the steps to confirm your shipment in VAOS.

• Remember to continue monitoring your mailbox and Spam folder for more allocation emails so that you can acknowledge your allocations in a timely manner.
  • If possible, mark noreply@salesforce.com as a safe-sender in your email system to avoid emails being sent to Spam.

• Once the Allocation Due Date has passed, the status of the allocation will change to Expired and you will be unable to accept that allocation.
4: Confirming Shipment
1. Once a vaccine allocation has shipped, you will receive an email notification from noreply@salesforce.com.

2. Save this email—you may want to reference it once your shipment arrives.

   ![Email Example]

   Hello Provider,

   Based on your vaccine allocation, a shipment of Pfizer 1 has been sent to your facility. Once you receive this shipment, it is very important that you go into the Texas Vaccine Allocation and Ordering System as soon as possible to confirm receipt and record any issues with your shipment. Please review the details on your shipment and instructions on the shipment process below.

   Carrier: FedEx
   Tracking number: FD1434254523423
   Date Shipped: 11/20/2020

3. When **you receive your shipment**, locate the email for step-by-step instructions and log in to your Provider portal.
   - [https://texasvaccines.dshs.texas.gov/](https://texasvaccines.dshs.texas.gov/)
Step 2: Navigate VAOS to View Shipment

4. Log in to the Provider portal and navigate to the **Accounts** tab.
   • [https://texasvaccines.dshs.texas.gov/](https://texasvaccines.dshs.texas.gov/)

5. Select **All Accounts** from the drop-down list and select the facility that is receiving the shipment.
Step 2: Navigate VAOS to View Shipment

6. In the **Vaccine Shipments** box, click **View All**. You will be brought to a list where you may view the shipment status under **Status**.

7. Select the shipment to be confirmed from the list. You will be redirected to the **Vaccine Shipment Details** page.
8. Review and verify accurate shipment information.

9. In the **Delivery Information** section, click the **Received?** checkbox and complete the requested fields.
10. In the **Quantity Received** section, enter the number of *doses* received (NOT vials).

11. In the **Inspection Details** section, enter information for missing or damaged doses.

12. Click **Save** to confirm receipt of the shipment.
13. The **Vaccine Allocation** details bar will now display the shipment as **Received**.
5: Request to Transfer Vaccines in VAOS
Request to Transfer Vaccine

Before requesting to transfer vaccines, note that it is the responsibility of the Transferring Provider to ship or physically transport the vaccine while maintaining the cold chain. Transferring Providers are also responsible for any costs incurred in transferring vaccines.

Before requesting a transfer, verify that the facility you want to receive the vaccine is an approved COVID-19 Vaccine Provider. COVID-19 vaccines may only be transferred to an approved COVID-19 Vaccine Provider.
Request to Transfer Vaccine

To prepare for submitting a vaccine transfer request in VAOS, make sure you have this information ready:

- ✓ Transferring Provider info (your information)
- ✓ Receiving Provider Organization Name and PIN
- ✓ Reason for transfer
- ✓ Vaccine Type
- ✓ Lot ID for the vaccine you want to transfer
- ✓ Dose Quantity to transfer

Before submitting a request to transfer, you should coordinate with the Receiving Provider or facility so that you can submit their correct information—**including their Provider PIN**.
1. Log into VAOS at [https://texasvaccines.dshs.texas.gov/](https://texasvaccines.dshs.texas.gov/) and navigate to the **Vaccine Requests and Transfers** tab.

2. Click **New**.
3. Select **Vaccine Transfer Request**.
4. Click **Next**.
5. Enter all mandatory information.

Vaccine transfer requests require a Receiving Provider PIN. Providers can find their Provider PINs on the Account Details page in VAOS.

The Inventory Record field refers to the Lot ID for the vaccine you want to transfer.

You will not be able to request to transfer more doses than your facility has available under the Lot ID.

You can verify the number of doses you have under a Lot ID by searching for the Lot ID. (see next page for instructions)
Step 3: Enter Transfer Request Information

6. To search for the inventory record, start by typing the Lot ID in the field. The associated Inventory Record, if available, will appear in the search results below. Select it.

7. Select the inventory item you wish to transfer and note the Quantity On Hand for that Lot ID. You will not be able to request to transfer more doses than is listed here.

8. Your selection will populate in the Inventory Record field back on the Vaccine Transfer Request page.
9. After completing all mandatory information, click **Save**.

Remember, you cannot request to transfer more doses than are available under your selected Lot ID.
10. Click **Download CDC Approval Form**. You must submit a signed CDC Approval Form for every transfer request.

11. Review & complete the form carefully. The information you provide on the form should match the information for your VAOS Provider account. Your Organization Medical Director (or Equivalent) and Chief Executive Officer (Chief Fiduciary Role) must sign the form.
12. After obtaining the appropriate signatures, upload the completed form into VAOS. To do this, click Add Files.

13. Click Upload Files.
Step 5: Upload and Submit CDC Approval Form

14. Select file to upload, click **Open**.

15. Select the checkbox next to the file you want to upload, click **Add**.
16. After the request to transfer is submitted, DSHS will review the request. The requesting person at the **Transferring Provider** will receive an email once the request has either been **approved** or denied.

17. If approved, the **primary & backup vaccine coordinators at the Receiving Provider** will also receive an email notification.
18. To view information for the Receiving Provider, Navigate to VAOS and click Vaccine Requests and Transfers to view your Service Requests.

19. Select All.
20. Select the relevant *Vaccine Transfer Request*. 
21. In the **Files** section, click **Download Vaccine Transfer form.**
22. Review the Vaccine Transfer Authorization Form to find the Receiving Provider shipping and contact information.
23. Contact the *Receiving Provider* and coordinate the transfer of vaccines. Ship or otherwise physically transport the approved amount of doses to the *Receiving Provider* using proper vaccine storage and handling. **Remember**: it is the responsibility of the *Transferring Provider* to practice proper vaccine storage & handling and maintain the cold chain.

*COVID-19 vaccines may only be transferred to an approved COVID-19 Vaccine Provider.*
5: Request to Return Vaccines in VAOS
Before requesting to return vaccines, note that it is the Requesting Provider’s responsibility to ship or physically transport the vaccine to its next location while maintaining the cold chain. Transferring Providers are also responsible for any costs incurred in transferring vaccines.
To prepare to submit a vaccine return request in VAOS, make sure you have this information ready:

- Transferring Provider info (your information)
- Reason for Return
- Vaccine Type
- Lot ID for the vaccine you want to return
- Dose Quantity to return

If your request to return vaccines is approved, DSHS will provide you with the information for a Receiving Provider. You will be responsible for transferring the approved vaccines to the Receiving Provider.
Step 1: Navigate to the VAOS Provider Portal

1. Log into VAOS at [https://texasvaccines.dshs.texas.gov/](https://texasvaccines.dshs.texas.gov/) and navigate to the **Vaccine Requests and Transfers** tab.

2. Click **New**.
Step 2: Create New Service Request

3. Select **Vaccine Return Request**.
4. Click **Next**.
Step 3: Enter Return Request Information

5. Enter all mandatory information.

You must choose a reason for transfer.

The vaccine type on your return request must match the type in the Lot ID.

You will not be able to request to transfer more doses than your facility has available under the Lot ID.

You can verify the number of doses you have under a Lot ID by searching for the Lot ID. (see next page for instructions)
6. To search for the inventory record, start by typing the Lot ID in the field. The associated *Inventory Record*, if available, will appear in the search results below. Select it.

7. Select the inventory item you wish to transfer and note the *Quantity On Hand* for that Lot ID. You will not be able to request to transfer more doses than is listed here.

8. Your selection will populate in the *Inventory Record* field back on the *Vaccine Transfer Request* page.
Step 3: Enter Return Request Information

9. After completing all mandatory information, click **Save**.

Remember, you cannot request to transfer more doses than are available under your selected Lot ID.
Step 4: Download and Complete CDC Approval Form

10. Click **Download CDC Approval Form.** You must submit a signed CDC Approval Form for every return request.

11. Review & complete the form carefully. The information you provide on the form should match the information for your VAOS Provider account. Your Organization Medical Director (or Equivalent) and Chief Executive Officer (Chief Fiduciary Role) must sign the form.
12. After obtaining the appropriate signatures, upload the completed form into VAOS. To do this, click **Add Files**.

13. Click **Upload Files**.
Step 5: Upload and Submit CDC Approval Form

14. Select file to upload, click Open.

15. Select the checkbox next to the file you want to upload, click Add.
16. After the request to return is submitted, DSHS will review the request. The requesting person at the Transferring Provider will receive an email once the request has either been approved or denied.

Dear Provider,

Thank you for your return request submission. Your request to return 2 doses of COVID-19 from Mail.org16_01 has been approved. These doses will be transferred to Tes Accl@.

As the returning provider, you are responsible for the physical transfer of the approved doses to Tes Accl@. You can view the relevant details of your vaccine transfer, including the address and contact information for the receiving provider, in the Texas Vaccine Allocation and Ordering System (VAOS) at [https://texasvaccines.dshs.texas.gov](https://texasvaccines.dshs.texas.gov).

Next Steps:
1. In VAOS, navigate to Service Requests and download Vaccine Transfer form to view relevant details for the receiving provider
2. Contact the receiving provider to coordinate the transfer of doses
3. Ship or otherwise physically transfer doses to the receiving provider as soon as possible

You can find additional information about VAOS and how to use it on the COVID-19 Vaccine Management Resources site.

For any questions related to COVID-19 orders, or technical questions on how the Vaccine Ordering and Management system operates, please contact COVID19VacEnroll@dshs.texas.gov

17. If approved, the primary & backup vaccine coordinators at the Receiving Provider will also receive an email notification.
18. To view information for the Receiving Provider, Navigate to VAOS and click Vaccine Requests and Transfers to view your Service Requests.

19. Select All.
Step 7: Access Receiving Provider Information

20. Select the relevant *Vaccine Return Request*. 

<table>
<thead>
<tr>
<th>Service Request Name</th>
<th>Record Type</th>
<th>Transferring provider</th>
<th>Quantity to transfer</th>
<th>Facility</th>
<th>Number of doses req.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR-0034</td>
<td>First Dose Allocation Request</td>
<td></td>
<td></td>
<td>TX Test</td>
<td>200</td>
</tr>
<tr>
<td>SR-0038</td>
<td>Vaccine Transfer Request</td>
<td>TX Test</td>
<td>450</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SR-0044</td>
<td>Vaccine Return Request</td>
<td>TX Test</td>
<td>200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
21. In the **Files** section, click **Download Vaccine Transfer form**.
22. Review the Vaccine Transfer Authorization Form to find the Receiving Provider shipping and contact information.
23. Contact the *Receiving Provider* and coordinate the transfer of vaccines. Ship or otherwise physically transport the approved doses to the *Receiving Provider* using proper vaccine storage and handling.

**Remember**: it is the responsibility of the *Transferring Provider* to practice proper vaccine storage & handling and maintain the cold chain in transport.
6: Reporting Waste
Step 1: Navigate to Vaccine Loss

1. Log into your Provider portal.
   • [https://texasvaccines.dshs.texas.gov/](https://texasvaccines.dshs.texas.gov/)

2. Navigate to the **Vaccine Loss** tab. You will be redirected to the **Vaccine Use** view.
3. View previously reported instances of vaccine waste or click **New** to report new waste.
4. Enter the required information in the **New Vaccine Use** pop-up window and click **Save** to complete the process.
   - **Quantity Consumed** should be entered in number of **doses** consumed
5. The new waste report now appears in the **Vaccine Use** list view.
Have Questions?

For questions about your COVID-19 Vaccine Provider account and accessing the dashboards, please contact us at COVID19VacMgmt@dshs.texas.gov