COVax_{ON} Check-Out Job Aid

Target Role: Check-out Clinician/Admin

Role Description: Monitors client after vaccination, performs client check out, and prints immunization receipt. **Permission Level: COVax Site Staff** • Check-out Capability • Edit Access for Client Record • Read-Only access to Vaccine Admin • View Dashboards and Linked Reports • Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report	**Legend** **Pencil Icon** Click this to edit any data fields **Red Asterisks** Indicates a required field *All COVID public health measures must be followed in alignment with this process.*

- *This document focuses on using COVax_{ON} to support clinical operations. Within the clinical package that each site received, there are additional forms that you will need to use alongside COVax_{ON}*
- *For details about COVaxON user access, refer to the "Login, Logout, and User Settings" job aid*

Data Privacy Disclaimer: Users with access to COVax_{ON} can see the demographic details and HCNs of other clients in the system when searching for a particular person. The information is presented this way to help ensure that users access the correct client record and to reduce the risk of either not locating a client's record or improperly creating duplicate client records.
- **As required by PHIPA and under the terms of the Acceptable Use Policy, system users are only permitted to access the information of individuals to whom they are providing care or for other purposes that are specifically authorized.**
- COVax_{ON} records detailed audit transaction logs that inform the MOH of which client records were accessed by each user, and what actions they took in the system. Any concerns that are identified about improper access to the system will be investigated and appropriate actions taken.

Client Check-Out Activities

Please hover over the section relevant to you, and "Ctrl + Click" to jump to the desired section

Section	Description	Link(s)
1. Monitor for AEFI	Client self monitors for AEFI with support of location staff	Monitor for AEFI
2. AEFI Occurrence and Documentation	If AEFI occurs, Clinicians treat the client, and record in COVax_{ON}	AEFI Occurrence and Documentation
3. Client Check-Out	Clinician documents details of the AEFI (when relevant) and check client out of COVax_{ON}	Client Check-Out
4. Printing Receipt & Scheduling Second Dose	Print the client's receipt and provide them with details of their second dose appointment	Printing Receipt & Scheduling Second Dose

1. Monitor for Adverse Events Following Immunization (AEFI)

Description:
After a client has been immunized, they are instructed to wait for 15 minutes after their dose to monitor for symptoms of adverse events following immunization (AEFI). Staff onsite will monitor clients for AEFI, and once the 15 minutes has elapsed, staff can search for a client record to begin the check out process.

How:
1. Navigate to the relevant "**Vaccination Events**" record and select "View All" under the Clients list. Leverage the filter capability in the top right-hand corner of the 'Clients' page to filter the list by status or specific client details. (Note: remember to clear all filters and update all relevant information every time you are searching for a new client. The system remembers any sorting/filtering that has previously been selected).
2. Once client is identified, Users can right click on client name hyperlink and open the client's record in a new browser window to avoid losing their spot on the Vaccination Event record. From the client's record,

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Users should confirm that the client status reads "**Dose 1 (or 2) Administered"** and the stage shows "**In Progress**".

3. Confirm client identity by asking for their health card number (if possible), or by their name PLUS other identifiers such as date of birth and postal code and matching it to their record.
4. Ask the client to wait for 15 minutes and monitor for any AEFI.
5. If client is showing symptoms of AEFI proceed to **section 2: AEFI Occurrence & Documentation**.
6. If client has waited for 15 minutes without showing signs of AEFI, proceed to **section 3: Client Check-Out**.

Further Context

- The clients view from the Vaccination Events tab is limited to 2000 records, therefore it is important to leverage filters to ensure there are no missing results (for example, by status, client name, etc.)
- There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, client status, if they experienced AEFI, and other client information. To view this report, go to the VE record you are interested in, scroll down to the "Report Links" section, and select the "Showing Clients for Vaccination Event" record.

2. AEFI Occurrence and Documentation

Description:
During the 15 minutes the client waits after dose administration, if an AEFI occurs, treat the client appropriately, then document the occurrence in COVax_{ON} by populating the AEFI checkbox in the check out window.

How:
1. Use the Public Health Ontario AEFI Guidelines to record AEFI details and follow the public health guidelines.

AEFI Guidelines

2. From the client record, select the arrow on the top right and select the "**Check Out**" button.

3. Select the checkbox, "**Select only if Adverse Events Following Immunization was experienced during the Immunization Event. Documentation to be completed on the Adverse Events Following Immunization Form**" if the client experienced an AEFI.

4. Proceed to the final check-out steps in **section 3: Client Check-out**.

Further Context

- The AEFI checkbox should only be populated if an AEFI occurs during the 15-minute wait time. If an AEFI occurs after the client has left the location (i.e. in the following days/weeks) it should not be recorded in COVax₀ₙ.
- If AEFI checkbox is populated during check out, it will be reflected on the client's Dose Administration record. This can be accessed/edited from the client record.

3. Client Check-Out

Description:
If the client does not experience AEFI while at the location after their 15-minute wait, the AEFI checkbox should be left blank during check out. If the client did experience AEFI, the checkbox should be populated, and the User can continue with the check out process.

How:
1. Select the arrow and click the "**Check-Out**" button.
2. Leave the AEFI checkbox blank if client did not experience any AEFI.
3. If the client provided an email, the "**Email receipt to patient**" box will appear and can be checked. If the client would not like to receive their receipt via email, ensure the checkbox is left blank.
4. Click "**Next**" to complete the client's check out.

Further Context

- If a client has not successfully gone through the dose administration process, the system will return an error when trying to check out. The previous step *must* be completed for clients to continue through the system.
- When the inventory hits 0 doses available, the Inventory status will change to "Completed". In this case, check out would be prevented. Contact your Inventory Manager in this case so they can adjust the inventory appropriately. If the status on the inventory record is "Available" and the doses available on the inventory record is 0 or negative, the client can still be checked out.

4. Printing Receipt and Scheduling Second Dose

Description:
After the client has been checked out, open the client's PDF receipt and print it off for the client. The receipt will open in a separate tab and users will have the option to print the receipt. Check out clinicians will retrieve the printed receipt and hand write the date and time for the client's second dose appointment.

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How:

1) On the right-hand side of the on the client record page, select the PDF hyperlink under **"Files."**
2) The receipt will open, select **"Download."**
3) The receipt will open in a separate tab.
4) Select the printer on site from the drop-down menu and select "**Print.**"
5) If required, use the site-specific scheduling system to schedule a second dose appointment for the client.
6) Write the date & time of the second dose appointment on the printed receipt (only applies for dose 1 check out).
7) Provide the client with receipt and relevant discharge information.

Further Context

- If the details of a dose administration record require editing, the user can do this directly from the dose administration record, which can be accessed from the client record. The user may also email the updated immunization receipt to the client. Please see the **"Edit Dose Admin Records & Merge Duplicate Clients"** Job Aid for details regarding editing a dose administration record and generating an updated receipt.
- The stage on the client record will move to "**Completed**" when the client has been checked out of one dose (if a single dose product) or both doses (if a double dose product).

At end of shift, log out of COVax_{ON} and clear the browser cache. Refer to the Login, Logout, User Settings job aid for detailed steps. Sanitize shared devices in accordance with location protocols.