




COVaxON Client Check-In Job Aid

Target Role: Check-In Clinician / Admin

<p>Role Description: Records client information and checks client into COVaxON</p> <p>Permission Level: COVax Site Staff</p> <ul style="list-style-type: none"> Client Search Edit-Access for Client Record Read-Only Access to Administer Dose Functionality View Dashboards and Linked Reports Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report 	<p>Legend</p> <p> Pencil Icon Click this to edit any data fields</p> <p> Red Asterisks Indicates a required field</p> <p> All COVID public health measures must be followed in alignment with this process.</p>
<ul style="list-style-type: none"> <i>This document focuses on using COVaxON to support clinical operations. Within the clinical package that each site received, there are additional forms that you will need to use alongside COVaxON</i> <i>For details about COVaxON user access, refer to the "Login, Logout, and User Settings" job aid</i> 	
<p>Data Privacy Disclaimer: Users with access to COVaxON 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.</p> <ul style="list-style-type: none"> 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. COVaxON 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 Record – Required and Encouraged Fields:

Site Staff must ensure that Client records are accurate and contain the required information to validate the client's identity and to avoid duplicate client records from being made:

<p>Client Record - Required fields are:</p> <ul style="list-style-type: none"> Last Name - The First Name is not required, but should be entered Gender Date of Birth (client's age will be calculated based on this and updated on their record) <p>Client Record - Highly Encouraged Fields are:</p> <ul style="list-style-type: none"> HCN (10-digits only): best defense against creating duplicate clients and validating client identity. If a client does not have a HCN, it is encouraged to request an "Alternative ID" (i.e. drivers' licence, passport, birth certificate, etc.). Vaccination Event: necessary to ensure clients can be vaccinated with inventory linked to that VE, the proper VE appears on the receipt, etc. Institution: Should be populated with the LTCH/RH/NH name for residents and staff. If client's "Reason for Immunization" is related to "Congregate Living", the Institution field should be populated with the accurate value if found upon searching. Contact Details: If the client consents to providing their contact details, collect this information. The "Preferred Method for Communication" should also be selected if contact details are provided. Address: Populate client address information using the google look up Primary Care Provider: Use the search bar to identify the client's primary care provider Reason for immunization: This field should be populated when possible. If it is not populated on the client record upon arrival, it will be asked during the check in process.

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Section	Description	Link(s)
<p>1. Locate Client Record in COVaxON</p>	<p>When client arrives, search for the client in COVaxON using either the VE or Client Search tabs</p>	<p>a) Search through the VE tab b) Search through the Client Search tab</p>
<p>2. Client Check-In</p>	<p>Check in the client, requesting data and communication consent</p>	<p>Client Check-In</p>
<p>3. Gather Additional Client Information</p>	<p>Ensure all mandatory fields are populated and add any additional information, including Sociodemographic information</p>	<p>a) Additional fields on Client Record b) Sociodemographic fields</p>

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4. Create New Client Record in COVaxON	If you cannot find the client, create the new client record	Create New Client Record in COVaxON
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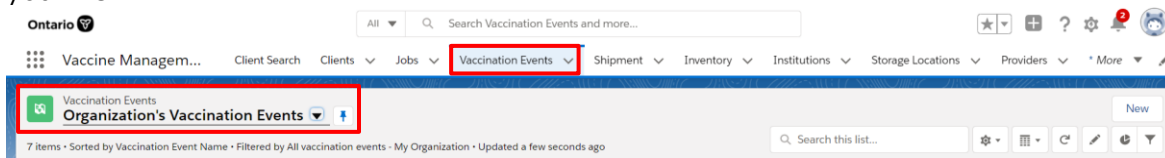
1a. Locate Client Records in COVaxON – from Vaccination Event

Description:

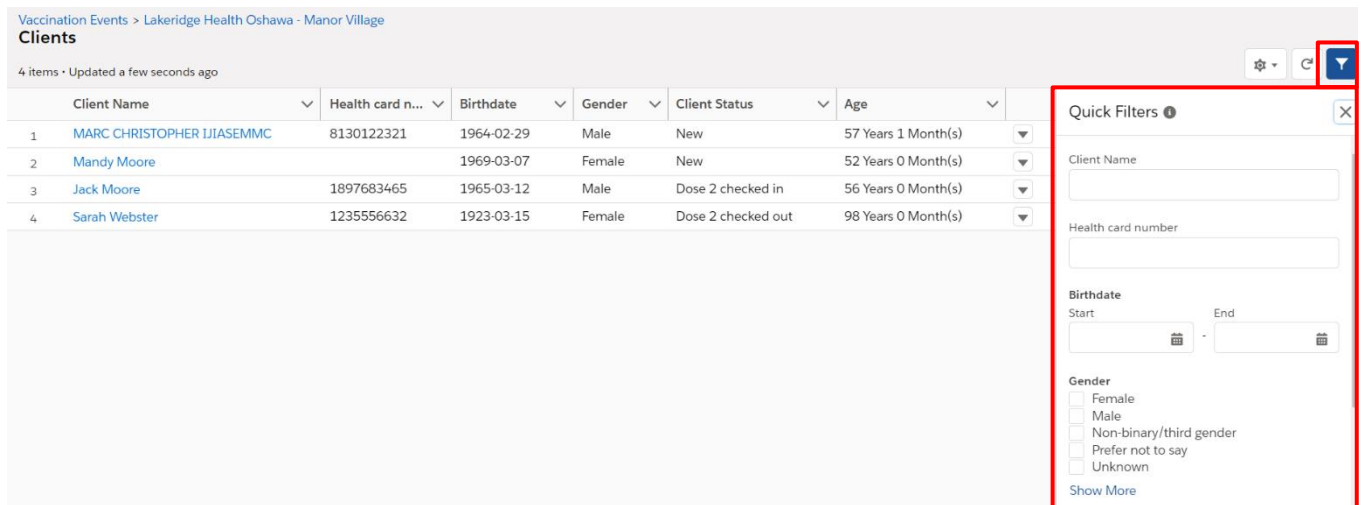
Once the client arrives at the check in station, verbally verify that they have completed the COVID-19 assessment. Once verified, follow the steps below to locate the client record in COVaxON.

Search for the clients through the Vaccination Events tab:

1. Select the “**Vaccination Events**” Tab.
2. Select “**Organization’s Vaccination Events**” from the list options to see all Vaccination Events (VE) within your AO.



3. Select the appropriate VE.
4. Scroll down to see a list of clients tagged to this VE. Select “**View All**” to see further details.
5. Select the filter icon.
6. Enter the relevant filters. For example:
 - a. Enter client HCN (recommended to ensure the correct client is selected)
 - b. Enter client name
 - c. Filter clients by status



7. Select “**Apply**”. Select the desired client’s name. Users can right click on client name hyperlink and open the client’s record in new browser window to avoid losing their spot on the Vaccination Event record. (Note: this view 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.)

Further Context

- COVaxON saves any previous sorting/filtering. If the search needs to be modified or a new client needs to be searched, the filters must be cleared before applying new filters. Do this by selecting “Clear All Filter” and “Apply”.

[Clear All Filters](#)

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1b. Locate Client Records in COVaxON – from Client Search Tab

If you are unable to locate the client within the Vaccination Events tab, the client record is not associated to that Vaccination Event and the client must be searched from the “Client Search” tab.

1. Go to the “**Clients Search**” tab.
2. Enter the Client’s Health Card Number in the designated field.

The screenshot shows the 'Client Search' tab in the COVaxON system. The 'Search' section contains 13 input fields. The first field, '1. Health card number', is highlighted with a red box and contains the value '1238965232'. The 'Search' button at the bottom is also highlighted with a red box.

3. Select “**Search**”. If there are results produced, they will be populated below. Scroll down on the page to see the results.
4. Select the desired client’s name to bring you to their record and follow the steps in [section 2: Client Check In.](#)
5. If the **client does not exist** after searching their health card number, or they do not have a health card number, use the following steps:
 - From the same “Client Search” tab, enter any key identifier of the client in the search fields (i.e. search for first or last name, date of birth, etc.)
 - It is recommended to search by 1 criterion (i.e.: last name) in the client search bar as opposed to multiple. This will return the most accurate results. The global search field at the top will find partial matches, whereas the specific fields must be exact.

The screenshot shows the search results table with one result. The table has columns for Client Name, Alias, Health card number, Birthdate, Gender, Mobile, Home Phone, Other Phone, Mailing Street, Mailing City, and Mailing Zip. The result is for George Clooney with health card number 1238965232, birthdate Feb-24-1950, and gender Male.

Client Name	Alias	Health card...	Birthdate	Gender	Mobile	Home Pho...	Other Pho...	Mailing Str...	Mailing City	Mailing ZL...
1 George Clooney		1238965232	Feb-24-1950	Male						

The screenshot shows the 'Client Search' tab in the COVaxON system. The 'Search' section contains 13 input fields. The search bar at the top is highlighted with a red box and contains the value 'george'. The 'Search' button at the bottom is also highlighted with a red box.

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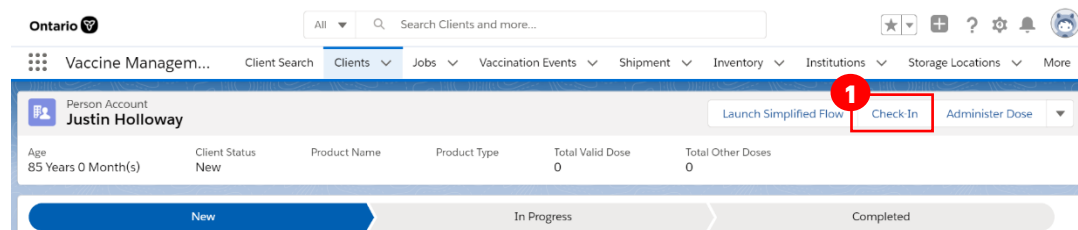
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- Select “**Search**”. If there are results produced, they will be populated below. Scroll down on this page to see the results.
- If the client exists, select the desired client’s name to bring you to their record. Update the “Vaccination Event” field on the client’s record, then proceed to [section 2: Client Check In](#).
- If the client does not exist, a new client record can be created. Refer to [section 4: Creating a New Client Record in COVaxON](#).

2. Client Check-In

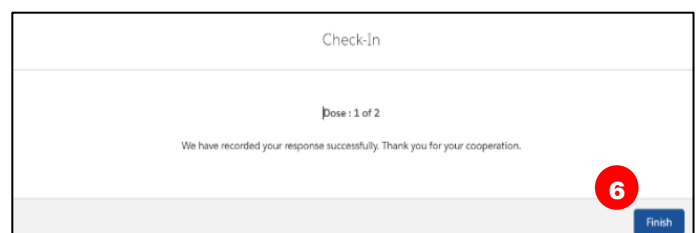
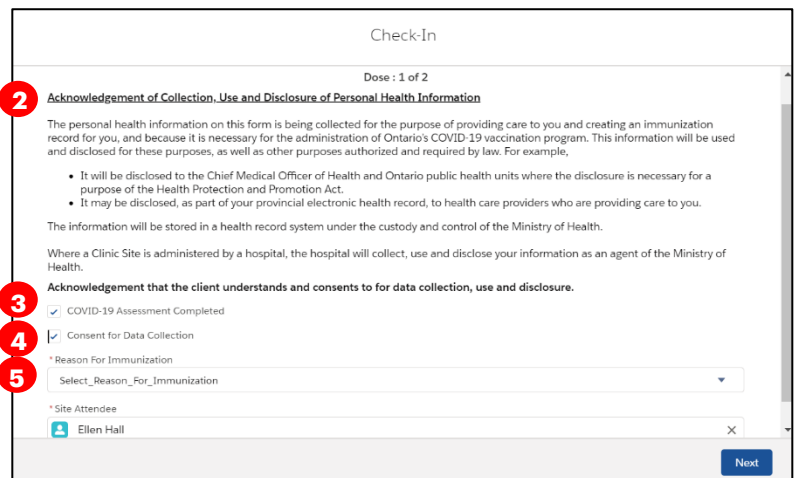
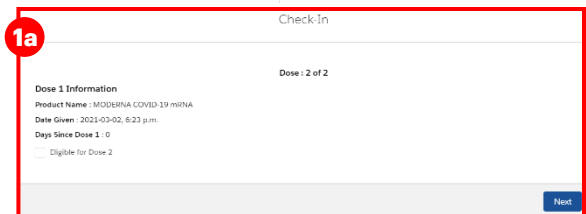
Description:

Once the client record has been located and opened in COVaxON, proceed with checking in the client.



How:

1. From the client record, select the “**Check-In**” button on the top right.
- 1.a) For double dose vaccines: when checking in Dose 2 clients, a dose 1 information pop-up will appear. Review the first dose information (the product that was given for dose 1 and ensure adequate days have elapsed since first dose and check the box that they are eligible to receive their second dose. Select “**Next**”.
2. Read the disclosure statement out loud to the client. You may also find this disclosure statement in the clinical package to print out and post on-site if needed.
3. Populate the “**COVID-19 Assessment Completed**” checkbox. This is a mandatory checkbox.
4. Obtain the clients consent for data collection and check the associated checkbox.
5. This checkbox indicates if the client consents to their personal data being entered into COVaxON. This is not a mandatory checkbox; however, if the client does not consent, no further data should be entered in into COVaxON and an offline paper process should be followed for vaccination (refer to the Offline Process in Module 1 section 5 of the “End to End Job Aid” for more details on this).
5. Select a Reason for Immunization from the dropdown if not already populated. This is a mandatory field. Select “**Next**”.
6. On the next screen, select “**Finish**”.



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Further Context

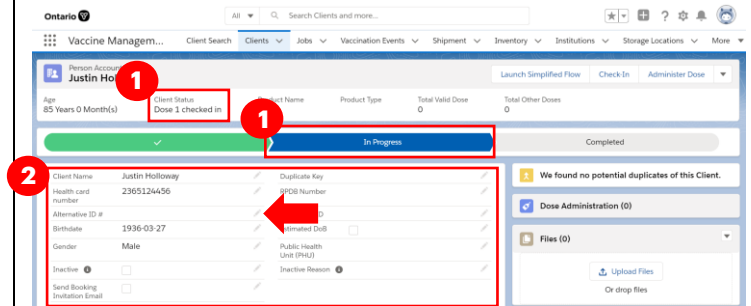
- Vaccinators are unable to administer a dose to a client until they have been successfully checked in.
- If a client has the “Inactive” checkbox populated on their record, users will receive an error when attempting to check in the client that reads, “The client should be ‘Active’ to proceed”. The user must remove the ‘Inactive’ checkbox on the client’s record to proceed with check in.
- The information entered on the check-in screen (checkboxes and “Reason for Immunization” field) will be automatically populated on the client record and can be modified if needed.

3a. Gather Additional Client Information

Description: Once the client is checked-in, review/update any missing information on the client record and ensure they are tagged to the correct Vaccination Event. Refer to the required and encouraged fields at the beginning of this job aid to ensure all of the pertinent information is captured.

How:

1. On the client record, ensure the client is checked in (“Dose 1 (or 2) checked in”).
2. Using the pencil icon, edit search fields to ensure all mandatory information is filled in and add any additional information.
3. Ensure that the client’s **Vaccination Event** field has been populated accurately. Use the pencil icon to update and search for the relevant VE if needed.



Further Context

- Upon client record creation or when updating client record details, COVaxON will automatically check/uncheck the “Follow-up Communication” consent checkboxes based on adding or removing phone number or email information.
- If one of the “Congregate Living” values are selected from the “Reason for Immunization” field, or the client is a Long Term Care Home worker or resident, the Institution field should be populated on the client record with the accurate Institution value.
- When populating the client address, Users should type the client’s provided address into the global search bar. Once the correct address is selected, all appropriate address fields will be populated. This ensures that the client’s address within COVaxON is entered accurately and completely.

Search Address

- Public Health Unit (PHU) field will be auto populated based on the postal code that has been entered on the client record. If the PHU that is auto populated is incorrect, the field will be editable once the postal code is entered.
- Make sure the client is tagged to the correct VE. Later in the client flow the Vaccinator will not be able to administer the dose if the client’s VE is incorrect.
- The email added to the client record can be the email of a substitute decision maker (for example, a relative or caretaker).
- There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, client status and other client information. To view this report, go to the VE’s record, scroll down to the “Report Links” section, and select the “Showing Clients for Vaccination Event” record.

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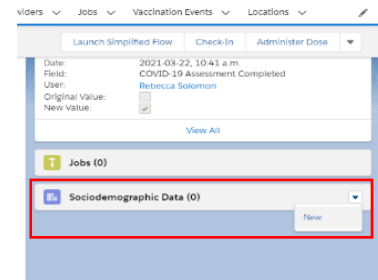
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3b. Gather Sociodemographic Information on Client Record

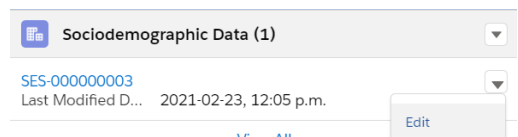
Description: After the client has been checked in, users will ask the client if they are willing to provide their Sociodemographic information. Use the following steps to populate data on the client record.

How:

1. From the desired client record, scroll down to the **“Sociodemographic Data”** section and select **“New”**
2. Read the disclaimer to the client, obtain consent for information collection, and populate following fields:
 - **Client:** Auto-populated based on the client record selected
 - **Consent:** Client must provide consent for the user to record sociodemographic details about them
 - **Race/Ethnicity:** Select from the available options and use the right arrow to **“Choose”** the option or use the free text field if needed. The left arrow can be used to move items out of the **“Chosen”** box.
 - **Total Household Income:** Indicate value from dropdown
 - **Household Size:** Indicate the number of people in the client’s household
 - **Childhood Language:** Indicate the language the client first learned and still understand from the options listed or use the free text field if needed.
 - **Official Language:** Indicate which of the Canadian official languages the client is most comfortable speaking
3. Select **“Save”** to save the information on the client record.

A screenshot of the 'New Sociodemographic Data' form. The form is titled 'New Sociodemographic Data: Sociodemographic Record Type'. It starts with a 'Consent for Collection of Sociodemographic Data' section, which includes a text area with a disclaimer and a checkbox for 'Consent to collect sociodemographic data'. Below the consent section, there is a 'Client' field with the name 'George Clooney'. The main form area is titled 'Sociodemographic Data' and contains several input fields: 'Race' (with a list of options: Black, East Asian, Latinx, Multiracial/Ethnic, and a 'Chosen' box), 'Ethnicity' (with a list of options: Aboriginal (Central...), Acadian, Afghan, and a 'Chosen' box), 'Total household income' (dropdown menu with 'None' selected), 'Household size (number of people)' (dropdown menu with 'None' selected), 'Childhood Language' (with a list of options: Albanian, Chinese, Hindi, and a 'Chosen' box), 'Official language most comfortable with' (dropdown menu with 'None' selected), 'Another race category, please specify' (text input field), 'Other ethnicity, please specify' (text input field), and 'Other childhood language, please specify' (text input field). At the bottom of the form, there are 'Cancel', 'Save & New', and 'Save' buttons.

4. Users can edit the Sociodemographic record by selecting the drop down and **“Edit”**. Users cannot delete a Sociodemographic record from the client record.



4. Creating a New Client Record in COVaxON

Description: If the client cannot be found from the Vaccination Event or Client Search tabs, this indicates that their record does not exist within COVaxON and must be created. Please refer to the established clinical processes for approving new clients before creating new records in COVaxON. When creating a new client

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record, it is important to capture as much information as possible and ensure accuracy. Refer to the [Client Record – Required and Encouraged Fields](#) section at the top of this document for information about specific fields.

There is an integration between COVaxON and the Registered Person Database (contains information of residents registered under OHIP). It is recommended to pull any client information from the database into COVaxON before creating the client manually. The data extracted from the database can include name, date of birth, gender, address. **If the client does not have a HCN, proceed to the [Manual Client Creation section below](#).**

1. From the Client Search tab, enter the client's health card number in the designated field and click **"Search"**.
2. The "Search HCN in Provincial Registry" button will become available (this button is normally greyed-out and will become available after searching for an HCN where no results are returned).

The screenshot shows a search form with the following fields: 1. Health card number (8125061484), 2. First Name, 3. Last Name, 4. Alias, 5. Birthdate, 6. Gender, 7. Mobile, 8. Home Phone, 9. Other Phone, 10. Mailing Zip/Postal Code, 11. Alternative ID, 12. Alternative ID #, and 13. Vaccination Event Name. At the bottom, there are three buttons: Search, Clear Search, and Search HCN in Provincial Registry (highlighted in red).

3. A window will appear, and the searched health card number will be auto populated. Click **"Next."**
4. A client record will appear with the details from the Registered Person Database.
5. Review the client details and add any additional details on the client record.
6. Select **"Next"**, then **"Finish"**. The client will then be added into COVaxON and can be found using the "Client Search" tab to be checked in. Proceed to [section 2: Client Check In](#).

Note: If there is no exact match for the client's HCN found in RPDB, a pop-up message will display saying "No Records Found". You may select the "Previous" button and modify the HCN if there was a mistake or proceed to manual client creation (below).

The screenshot shows a form titled "Provincial Registry Client Record" with a field for "Enter Health Card Number" containing the value "8125061484" and a "Next" button.

The screenshot shows a form titled "Provincial Registry Client Record" with the following details: First Name: BUTR, Middle Name: YOMINA, Last Name: LOHJMC, Health Card Number: 8125061484, Date of Birth: Jan 21, 1917, Gender: Female, Organization: Public Health Unit (PHU).

The screenshot shows a search results box with "Result(0)" and a "New Client" button.

Manual Client Creation

1. From the **"Client Search"** tab, select **"New Client"** below

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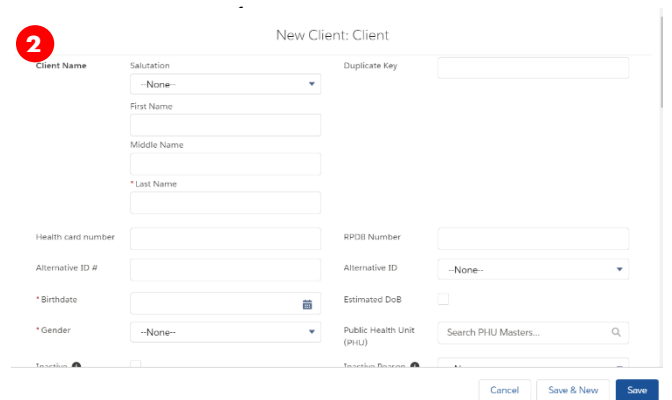
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Note: if you are having trouble selecting the “New Client” button, type an identifier into one of the search fields, click “Search” and then you can select “New Client”

2. A new client information window will open. Proceed to fill in client information. Refer to the “[Client Record – Required and Encouraged Fields](#)” section at the top of this document for details on populating the client record.

3. Select “**Save**”. You will be brought to the client record. Follow [section 2: Client Check In](#)

Note: duplicate client entries may be detected in the system, refer to the “Further Context” below



Further Context

- When populating the client address, Users should type the client’s provided address into the search bar. Once the correct address is selected, all appropriate address fields will be populated. This ensures that client addresses within COVaxON are entered accurately and completely.
- There is logic in COVaxON to determine if a duplicate client record is being created. When a duplicate is detected a warning message will pop up, however Site Staff and Vaccinators can bypass this error and continue with client creation, as long as the Health Card Number is not the same. If the HCN is the same, the User cannot proceed with client creation. The error will appear as follows:



- After receiving this error, users can click “**View Duplicates**” to see the other client records in the system for comparison. It is highly encouraged that Users ensure that they are not in fact creating a duplicate client. If the user clicks “**Open This Client**” they will be brought to the original client’s record.
- A duplicate client will be detected in the system if **there is an exact match on the health card number**, or a **combination of other demographics**:
 - Name match on 2 or more of First Name (exact or approximate), and Last Name (exact or approximate), and **ONE OF**: Date of Birth (exact match), Postal Code (exact match), OR Phone number (home, work, mobile, other) (exact match). *The phone number and the phone type must match (will not cross references across different types).*
- In addition, there are 2 reports available for identifying potential duplicate clients in COVaxON. These reports can assist Site Super Users in resolving duplicate client records. Please see the **Edit Dose Admin & Merge Duplicate Clients** job aid for more details about resolving duplicates.

At end of shift, log out of COVaxON 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.