

COVaxON Comprehensive Login, Logout, User Settings

Target Role: All users of COVaxON (Inventory Administrator, Clinician/Admin, Waiting Room Clinician & Vaccine Administrator)

Activity Description:

This job aid outlines how to get set up within COVaxON, how to log in and out of the system and specific user access details.

Notes:

COVaxON accounts time out after 30 minutes of inactivity. However, tablet device configuration settings may be set to log out before 30 minutes, and this will exit your Salesforce Account. This can manually be changed on the individual tablet devices or the service desk can be contacted.

Login, Logout, User Settings Activities:

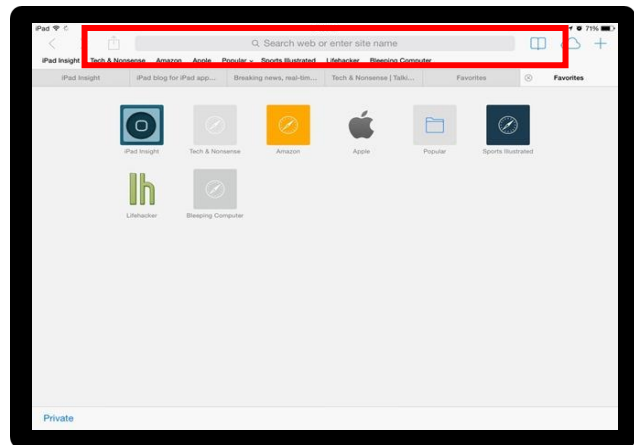
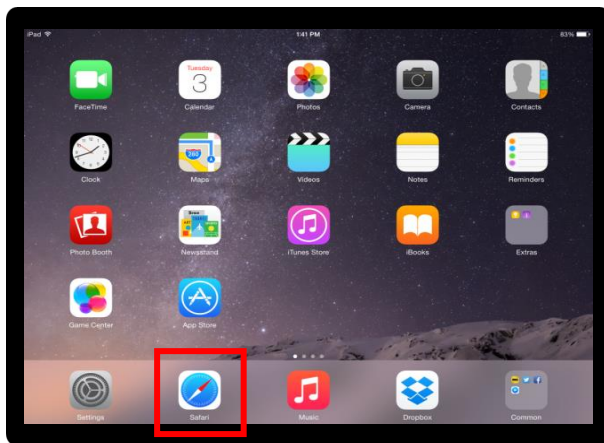
Please hover over the section relevant to you, and "Ctrl + Click" to jump to the desired section

| Section | Description | Link(s) |
|--|--|--|
| 1. Setting up Two Factor Authentication for COVaxON | Steps to setting up user accounts using the Salesforce two-factor authentication app | Setting up Two Factor Authentication for COVaxON |
| 2. Logging in to COVaxON | Steps for users to properly login to their COVaxON account | Logging in to COVaxON |
| 3. Logging out of COVaxON | Steps for users to properly logout of their COVaxON account | Logging out of COVaxON |
| 4. User Access based on Authorized Organization | Details on user access levels based on Authorized Organizations | User Access based on Authorized Organization |

1. Setting up Two Factor Authentication for COVaxON

If you have previously logged into and authenticated Salesforce and are now logging into a new environment for the first time, proceed to steps 9-16.

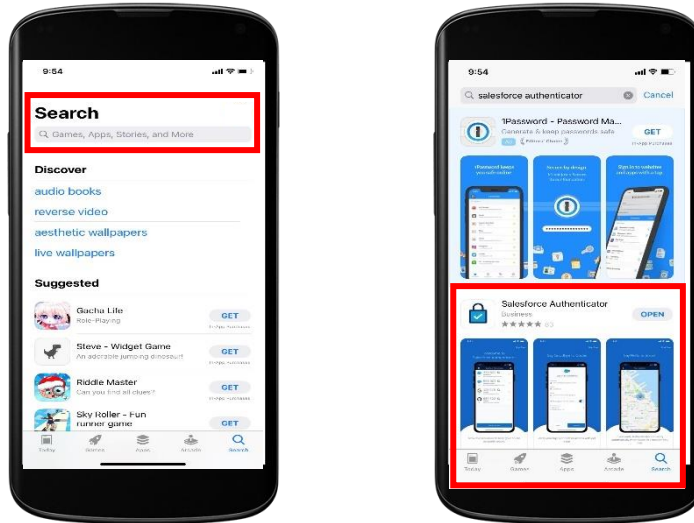
- 1) On the provided tablet/computer/laptop, open either **Safari, Google Chrome or Microsoft Edge** browser applications.
(Note: Any of these 3 browsers are recommended to access COVaxON)
- 2) Using the search bar, enter the URL of your email provider (i.e. Gmail, UHN, Outlook, etc.)



- 3) Log into your email account.
- 4) You will have one of the following emails from support@jp.salesforce.com. For the first email, copy the link in the email and paste it into a separate browser window (Safari/Chrome/Microsoft Edge). If you received the second email, right click the "verify account" button, select "Copy Hyperlink" and paste this URL into your browser.

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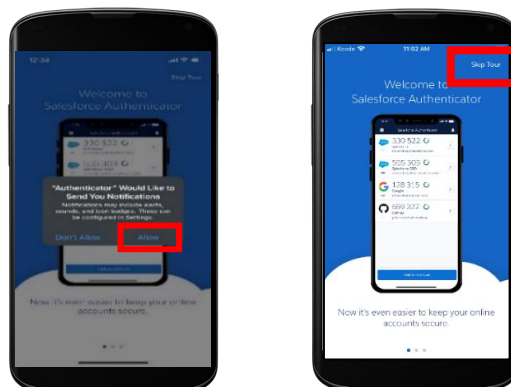
10) Select **"Get"**. You may have to enter your Play Store / App Store credentials here.

11) **On your mobile phone**, open the Salesforce Authenticator app.



12) When asked if you allow this application to send notifications, select **"Allow"**.

13) Click **"Skip Tour"** at the top right corner of the screen.

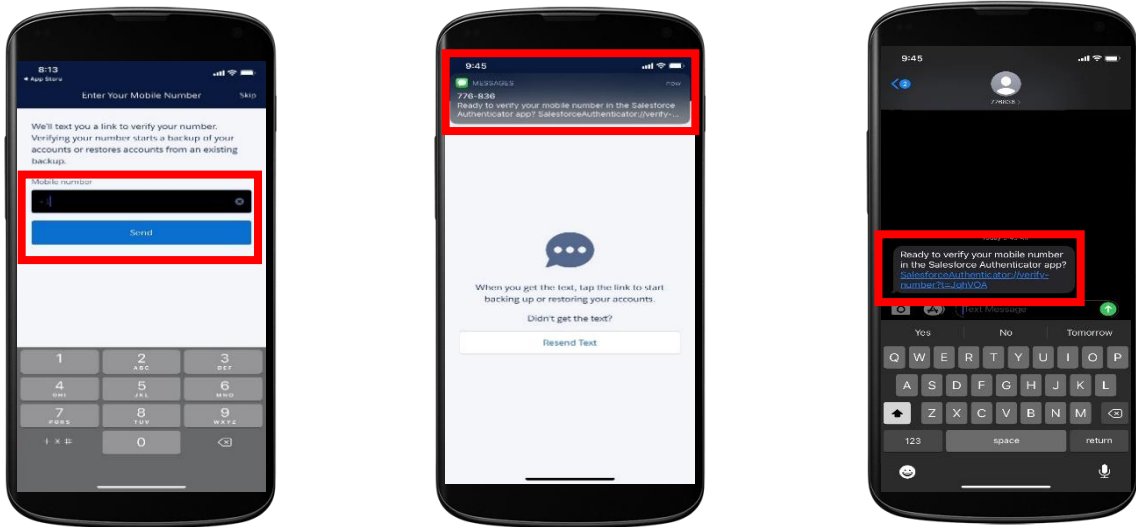


14) Enter your mobile phone number using the keypad. Click the **"Send"** button to have Salesforce send you an automated SMS message.

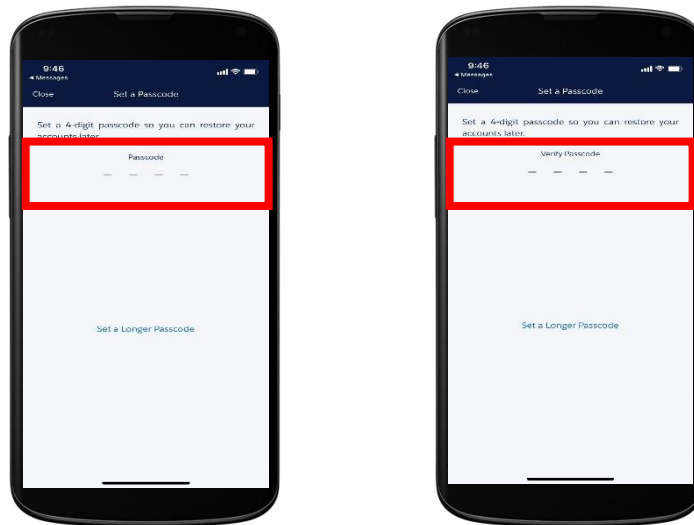
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- 15) Wait to receive an automated SMS message from Salesforce. Once you have received the SMS message, **open the message**. **Click the link** that is provided.



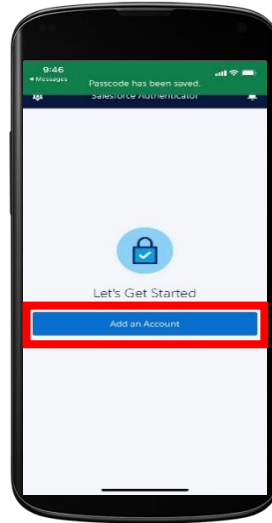
- 16) Once you click on the link, this window will open on your mobile phone. **Choose a 4-digit passcode**, and then **verify** that passcode by entering it in a second time.



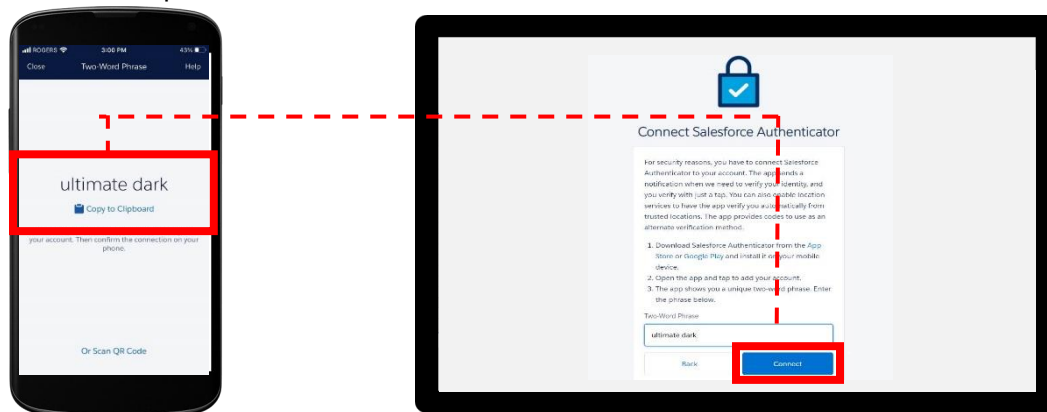
- 17) You will see a green message at the top of your screen indicating that the passcode has been saved. Click the **"Add an Account"** button to continue. **Note: if you have already gone through the registration process on the Salesforce Authenticator app, and you are logging into a new environment, you can start here to by selecting "Add an Account."**

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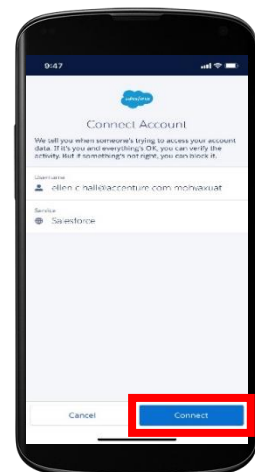
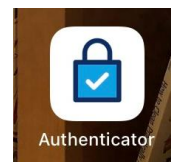
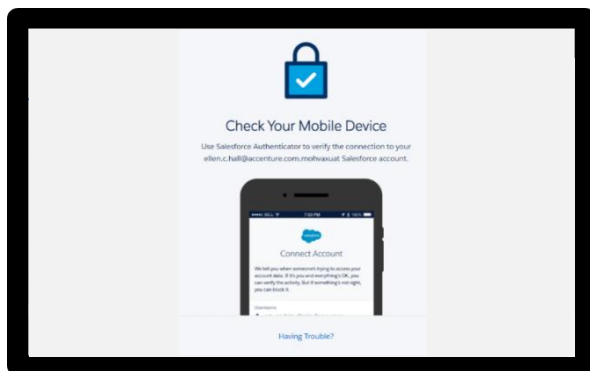
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- 18) On your mobile within the Salesforce Authenticator app, you will see a **two-word phrase** provided.
- 19) **Put your mobile phone down. Using the tablet**, go back to the browser window from step 7. Enter the two-word phrase in the box below.



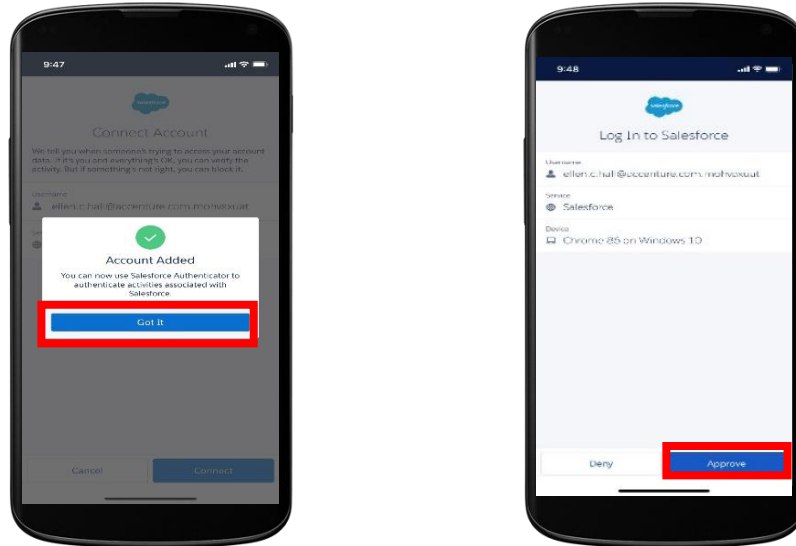
- 20) The following message will appear. Follow the prompt and **go back to your mobile device**.
- 21) On your mobile device, open the Salesforce Authenticator app.
- 22) The following screen will appear. Click **"Connect"**.



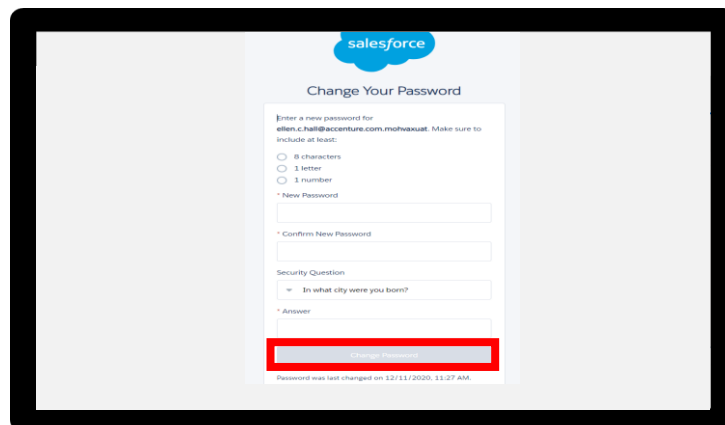
- 23) The app will indicate that the connection is successful. Click **"Got It"** to confirm.
- 24) The Salesforce Authenticator app will ask you to approve the account. Click **"Approve"**.

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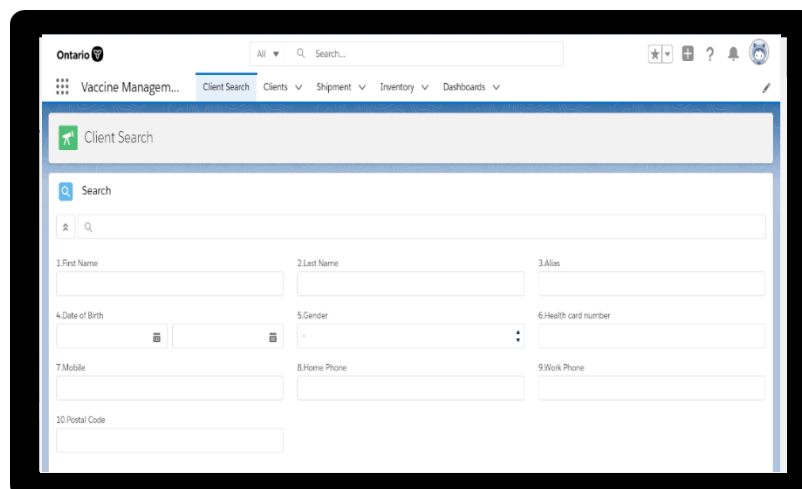
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25) Using the tablet/computer/laptop, go back to the browser window from step 20. Follow the prompts to create a suitable password. **Ensure that you remember this password for future use.** Click **“Change Password”**. You will then be logged in. You must remember this password to log into COVaxON.



26) Once logged in, the COVaxON home page will appear as follows:

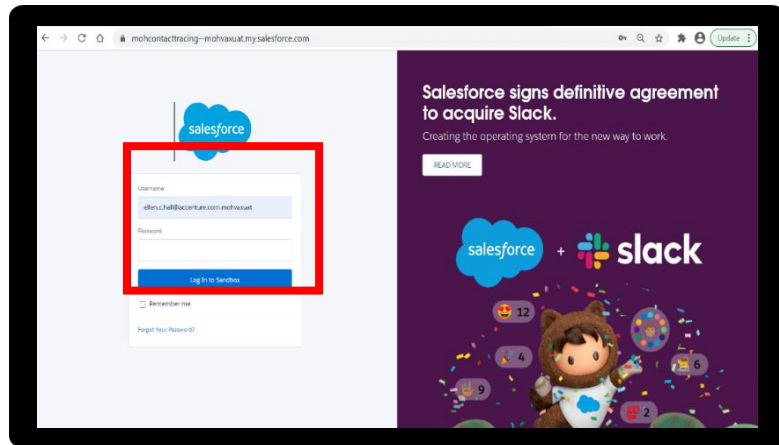


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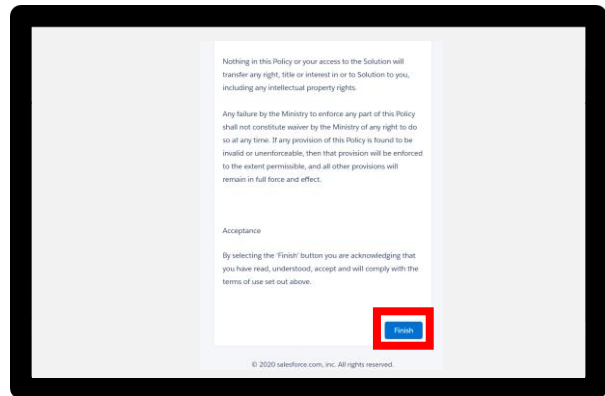
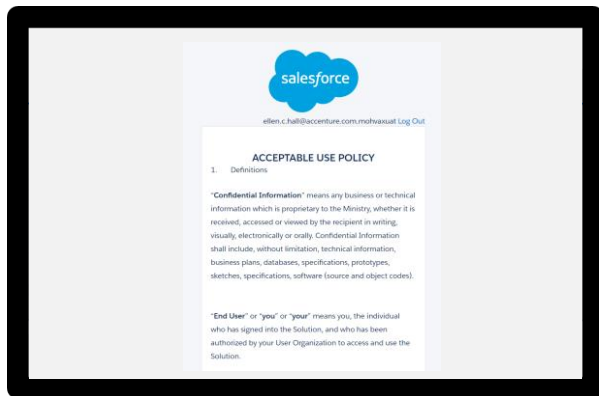
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2. Logging in to COVaxON

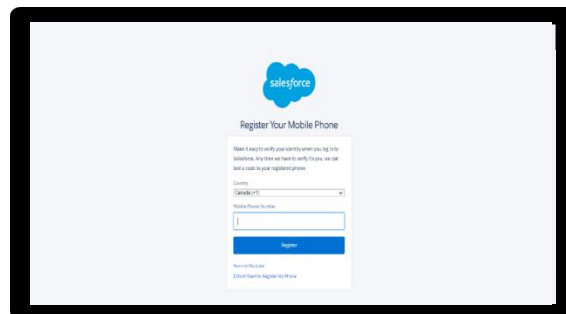
- 1) If using a tablet on site, open COVaxON using the installed application.
- 2) If using a desktop, open the browser (Safari, Google Chrome or Microsoft Edge) and go to the COVaxON URL link.
- 3) Enter your username and password credentials. Click **“Log In To Sandbox.”**



- 4) Again, you will see the “Acceptable Use Policy”. Scroll down to read through the policy. To agree to the terms, click the **“Finish”** button at the bottom of the Acceptable Use Policy.



- 5) The first time you normally login, you will need to register your mobile device.
 - Ensure you change the country to be **“Canada”**.
 - **Enter your mobile number**, Click **“Register”**.



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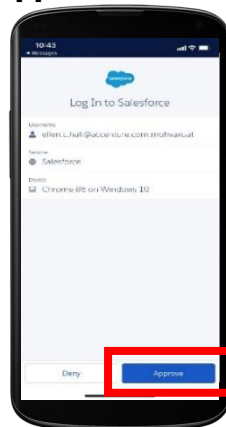
Note: This is a one-time step. Once you complete this step, it will not appear for future logins.

- 6) You will get a text message on your mobile with a verification code.
 - Enter this code on the screen.
 - Click **“Verify”**.



Note: This is a one-time step. Once you complete this step, it will not appear for future logins.

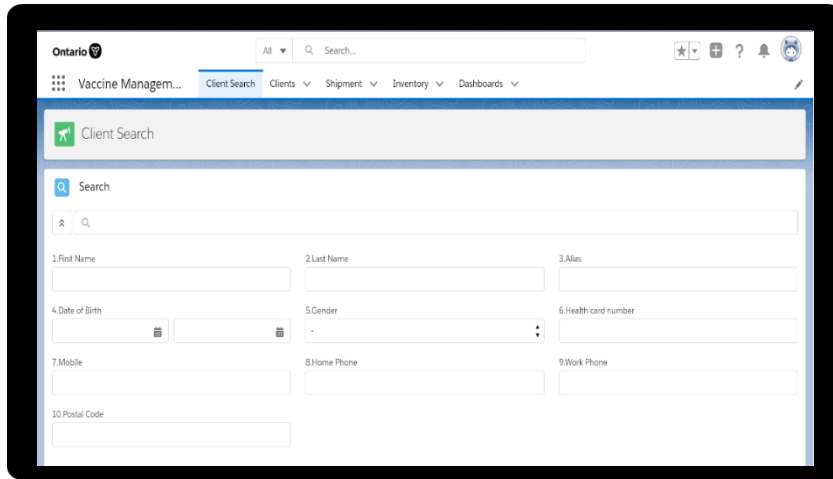
- 7) On your mobile device, you will receive a request from the Salesforce Authenticator app.
- 8) Open the application and select **“Approve”**.



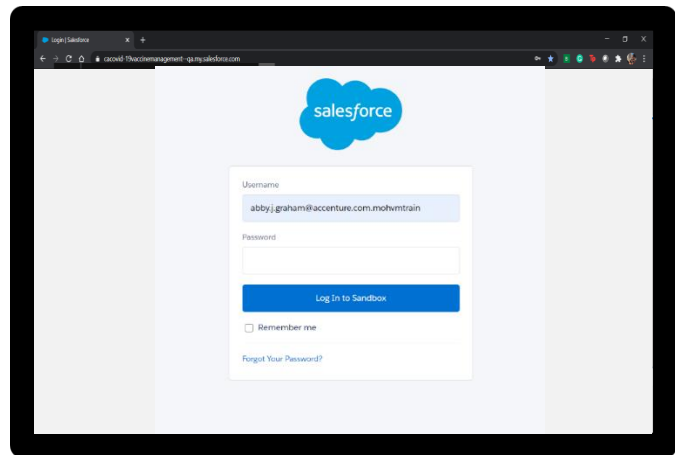
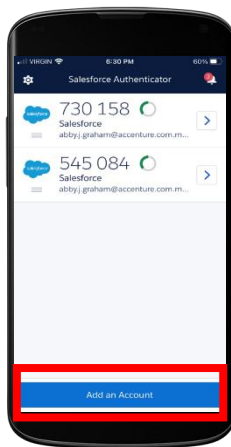
- 9) On the tablet/computer/laptop, you will be brought to the COVaxON home page.

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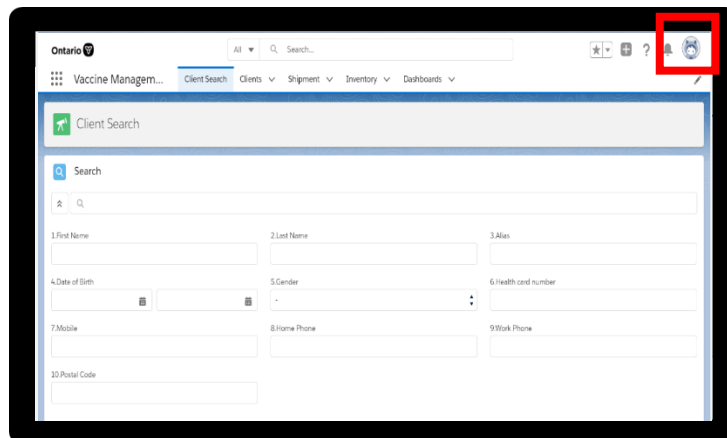


10) If using multiple Salesforce logins (i.e. if you belong to multiple AOs and require different logins – see section 4 below), you will need to add a new account to your authentication app. You can do this by clicking “Add an Account” when logging into your other Salesforce accounts.



3. Logging out of COVaxON

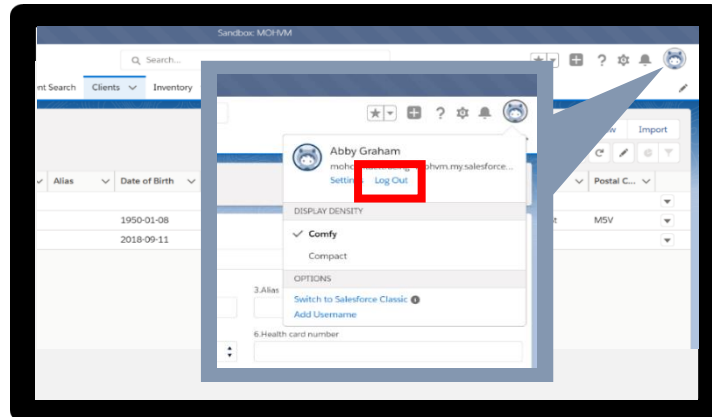
1. On the tablet/computer/laptop, from the home screen of COVaxON, select the icon on the top right corner.



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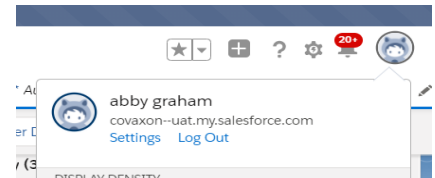
2. Select "Log Out"



3. Exit the browser window.
4. Open tablet/computer/laptop Settings and follow the steps to clear your browser history.
5. Sanitize shared devices according to individual site protocols and provide to on-site IT.

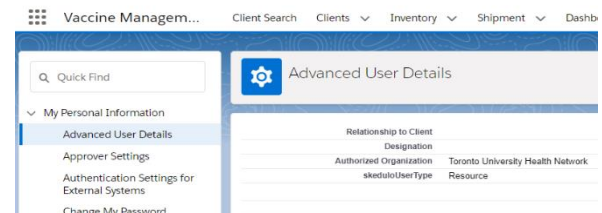
4. User Access based on Authorized Organization

All Users are associated with a profile type and an Authorized Organization. This drives the ability for the User to perform activities within COVaxON on behalf of that Authorized Organization.



To View the Authorized Organization on Your Profile:

1. Select your Salesforce Avatar on the top right-hand corner of the page.
2. Select "Settings."
3. Navigate to "Advanced User Details."
4. Scroll-down to check your "Authorized Organization."



User Who Works at Multiple Authorized Organizations

- Users who work for more than one Authorized Organization will be granted separate login credentials for each Authorized Organization. If you require access to an additional Authorized Organization than what you currently have on your profile, you will need to contact the Site Lead of that Authorized Organization, so they can submit a request to the ITS team to grant you login credentials. The Site Leads are encouraged to regularly audit the list of Users and revoke access to any Users no longer working for their Authorized Organization. In the case that it is a secondary account, ensure to indicate that in the User template. Users with multiple accounts will use the same email for all accounts, but the username will be different, as per the below:
 - **Account 1:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon
 - **Account 2:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon2
 - **Account 3:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon3
- If a User is improperly mapped to an Authorized Organization and only works for one Authorized Organization, a request can be submitted by the Site Lead of the Authorized Organization to the Service Desk for the Authorized Organization to be changed.
- Please note: **if you work across multiple Vaccination Events within the same Authorized Organization**, you can use the same COVaxON account, and will not require multiple logins.

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The activities Users can perform are based on their profile:

| User Profile | Functionality Profile Has Access To | Reports/Dashboards Profile Has Access To |
|---------------------------|--|--|
| COVaxON Inventory Manager | Create shipments, inventory, report wastage & excursion, manage recalls, link inventory to VEs, create and manage VEs | <ul style="list-style-type: none"> • Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report • View Dashboards and the Linked Reports |
| COVaxON Site Staff | Update client records, check-in clients, bypass client duplicate errors, create and manage VEs | <ul style="list-style-type: none"> • Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report • View Dashboards and the Linked Reports |
| COVaxON Vaccinator | Update client records, check-in clients, document/update dose administration, check-out clients, edit and change status of Dose Admin Records, Client Merge functionality, bypass client duplicate errors, create and manage VEs | <ul style="list-style-type: none"> • View Dashboards and the Linked Reports |
| COVaxON Site Super Users | Inventory Manager functionalities, Vaccinator functionalities, plus mass data client upload | <ul style="list-style-type: none"> • Read and Export Summary Client and Dose Administration Report, Detailed Client and Dose Administration Report & Vaccine Inventory Report, Duplicate Report • View Dashboards and the Linked Reports |
| COVaxON Dashboard User | View Site Dashboards, create and manage VEs | <ul style="list-style-type: none"> • No access to Reports • View Dashboards (cannot view the Linked Reports) |