COVax$_{ON}$ Edit Dose Admin Records & Merge Duplicate Clients Job Aid

Target Role: Vaccine Administrator & Site Super User

Role Description: Responsible for documenting vaccination administration and handing client records **Permission Level: COVax Vaccinator** • Access Client Search • Edit-Access for Client Record • Administer Dose Capability • View Dashboards and Linked Reports For Site Super Users: Read and Export Summary Client and Dose Administration Report, Details Client and Dose Administration Report & Vaccine Inventory Report, View Dashboards and Linked Reports	**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 COVax$_{ON}$ 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.

Edit Dose Admin & Merge Duplicate Clients Activities:

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

1. Editing a Dose Administration Record

Description:

It is advised to ensure that all accurate information is captured on the dose record before selecting "Finish" on the Dose Administration screen (refer to the "Vaccine Admin Job Aid for more details). However, in specific circumstances, the user can edit the Dose Admin record after the dose information has been recorded. ***Note: Both Vaccinators and Site Super Users can edit a dose admin record***

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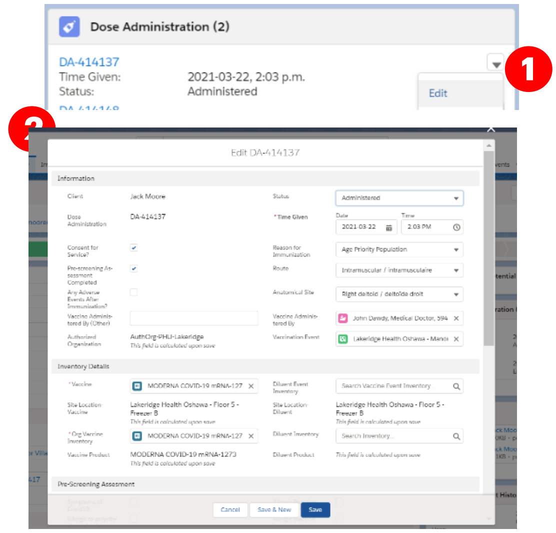
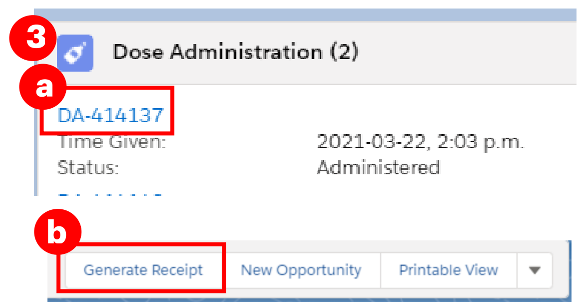
Editing the details of an Administered Dose:

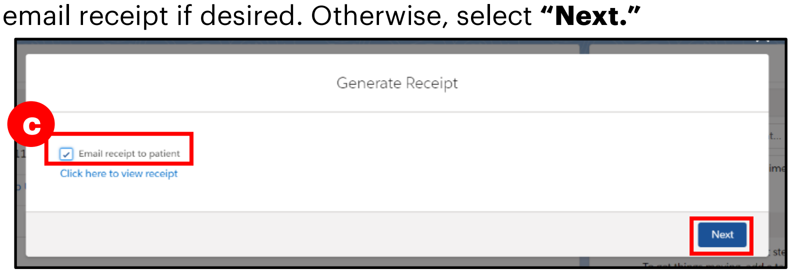
1. If the User needs to edit the Dose Admin (DA) record after the dose has occurred, they may re-open the record by selecting "**Edit**" from the drop-down arrow on the client's record.
2. From there, Users may update any of the fields except the "Status" field – see section below for further details on editing the DA status. Fields that can be edited in the dose record include adding details in the notes section and correcting the time of the dose received. Note: the date and time of the dose received can be edited but cannot be removed (as they are mandatory fields). Once completed, select "Save" to re-save the record.



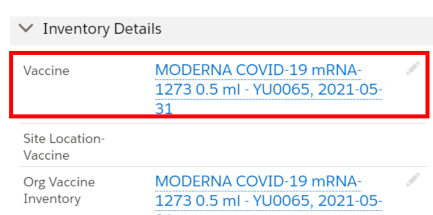
3. The user may also choose to re-print the client's receipt based on the edits made to their dose record. ***To re-print the edited receipt, follow the directions below:***
    a) Open the client's edited dose record by selecting the Dose Admin Record ID (i.e. DA-414137). Users can right click on client name hyperlink and open the client's DA record in new browser window to avoid losing their spot on the client's record.
    b) This will open the Dose Admin Record and you will see a **"Generate Receipt"** button on the top right corner. Select "Generate Receipt."
    c) A Generate Receipt pop-up will open. If the client inputted an email and consented to email communication, there will also be an option to email the client the new receipt. Under the "Contact Information" section of the client record, an email can also be added at any time. Check the box to email receipt if desired. Otherwise, select **"Next."**
    d) Select **"Finish"** to generate a new receipt.



The new receipt will populate under **"Files"** as the previous receipts have done. Users can then proceed to re-print the newest receipt for the client. For printing guidance, refer to the Check-out Job Aid.



Note: If the event inventory was incorrectly selected, it can be edited from the dose admin record. Only edit the "Vaccine" field, **not** the "Org Vaccine Inventory" field.



COVaxON Edit Dose Admin Records & Merge Duplicate Clients Job Aid

Target Role: Vaccine Administrator & Site Super User

2. Changing the Status of a Dose Admin Record

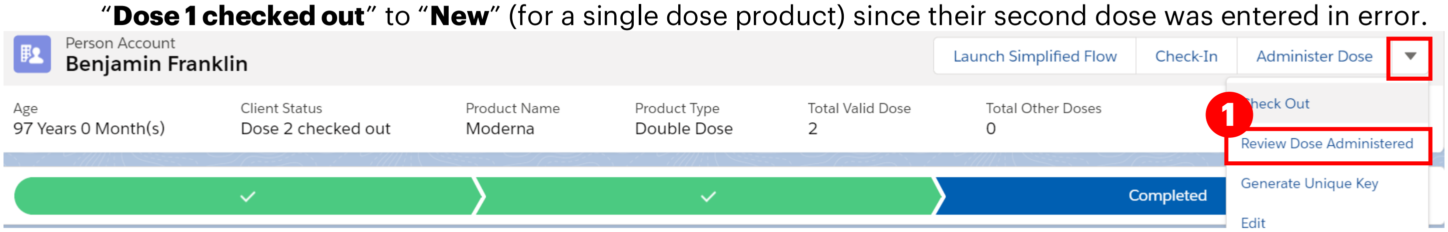
Description:

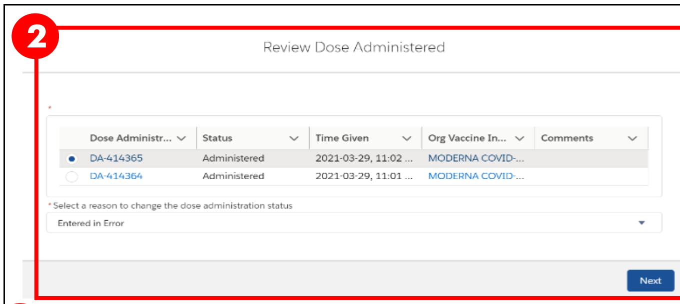
The user may need to change the status of a dose administration record. The status may be changed from "Administered" to "Invalid", "Inventory Recalled" or "Entered in Error" based on 3 scenarios outlined in the chart below. Use the following steps to change the status on a dose admin record.

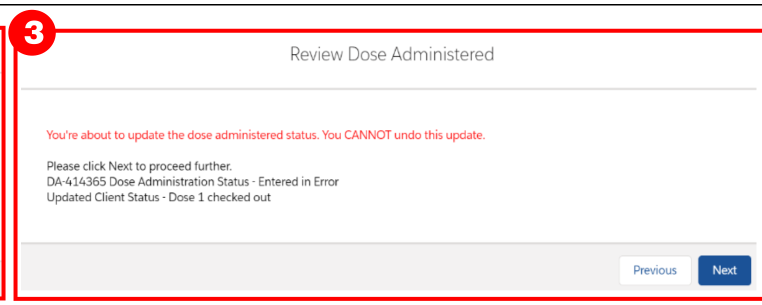
<u>Note: BOTH Site Super Users and Vaccine Administrators can change the status of a dose admin record</u>

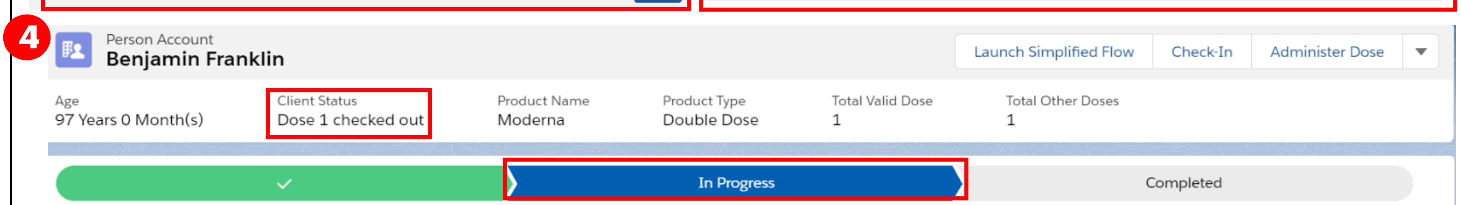
How:

1. Select "Review Dose Administered" from the arrow drop down on the top right corner of the client record
2. Select the Dose Administration record that requires a status update and select the status that the record should be changed to (For example, "Entered in Error" – refer to the table below summarizing how each status should be used)
3. The details of the changes will populate in the "Review Dose Administered" Screen. Review and Select "Next".
4. The stage in the client header will move from "**Completed**" back to "**In Progress**", and the Client's status will change from "**Dose 2 checked out**" to "**Dose 1 Checked Out**" (for double dose products) or from "**Dose 1 checked out**" to "**New**" (for a single dose product) since their second dose was entered in error.









Dose Status	Scenario for the Status Change	Result
Invalid	If there is a clinical issue related to the dose administration record, the status of that record should be changed to "Invalid". For example: • The client received dose 2 too soon • The client received another vaccine type too close to the COVID-19 vaccine (proximity of days).	• Does not adjust inventory • **Client status changes to "New"** if

	The client will need to return to be vaccinated again. Refer to the product monograph or NACI guidelines for additional details regarding next steps for client re-immunization (provided in the Clinical package).	client was "Dose 1 checked out" and their dose 1 record was adjusted • **Client status changes to "Dose 1 checked out"** if client was in "Dose 2 checked out" and their dose 2 record was adjusted
Inventory Recalled	If a lot # of inventory is recalled, the status of the Dose Administration record should be changed to "Inventory Recalled". For example, if it was identified that a particular lot has shown to be ineffective. The client will need to return to be vaccinated again. Refer to the product monograph or NACI guidelines for additional details regarding next steps for client re-immunization (provided in the Clinical package). The "Detailed Dose Client & Dose Admin" report available to Super Users can be used to identify clients administered with the recalled inventory.	

Entered in Error	If a dose administration record is created in error (and that dose was not physically received by the client), the status of that record should be changed to "Entered in Error". For example:
	• If the dose was already administered to the client and logged in COVax$_{ON}$, so the new one is a duplicate.
	• The client record already existed, but a duplicate client record was created with a new dose administration record.
	• Staff accidentally record the dose administration to the wrong client record instead of the client presently being vaccinated. In this case:
	  ○ On the wrong client: Check out the client, then follow the process to change the Status of that client to "Entered in Error". Then check them in and follow the proper dose administration flow when that client is actually receiving their dose.
	  ○ On the correct client: Search and find the correct client using identifiers such as HCN, date of birth, etc. Enter the dose administration to that client.
		• 1 dose gets added back to the Doses Available in inventory
		• **Client status changes back to "New"** if client was "Dose 1 checked out" and their dose 1 record was adjusted OR
		• **Client status changes back to "Dose 1 checked out"** if client was in "Dose 2 checked out" and their dose 2 record was adjusted

Further Context

- There is another status available "Wasted". ***This status should not be used.*** The normal process to log a wastage event for that inventory should be followed and no updates are required to the dose administration record since wastage does not impact administered doses.
- Before conducting an adjustment to a Dose Administration record, the client must be in the "Dose 1 (or 2) Checked Out" status. It is not recommended to make any changes to dose administration records while the client is in the middle of the administration process. For example, if part way through the administration of dose 2 it is identified that Dose 1 was invalid, it is recommended to follow the full dose 2 administration and check out process. After that has been completed, the dose 1 record can be modified, which will update the client to the status "Dose 1 Checked Out", and the client will need to return for their official dose 2.

COVax_{ON} Edit Dose Admin Records & Merge Duplicate Clients Job Aid

Target Role: Vaccine Administrator & Site Super User

3. Duplicate Reports

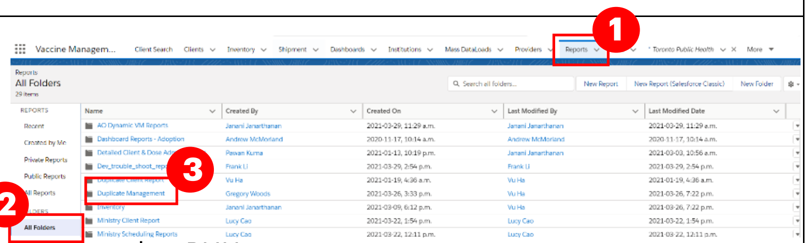
Description: Two reports are available to identify potential duplicate clients in COVaxON and to assist Site Super Users in resolving duplicate client records. The reports display the client characteristics and the duplicate record item name allowing the user to proceed to manage the duplicates and leverage the client merge functionality. Follow the instructions below to learn how to access both reports.

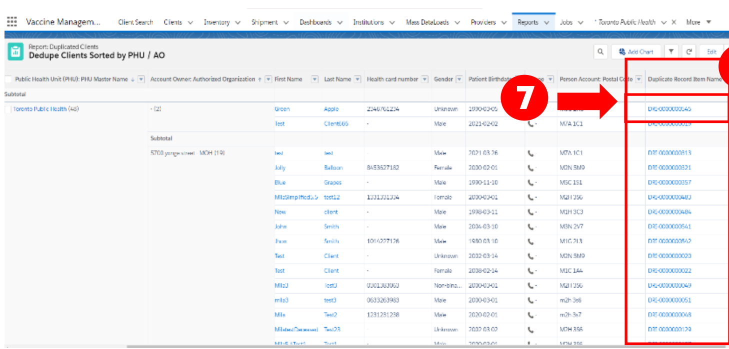
How:

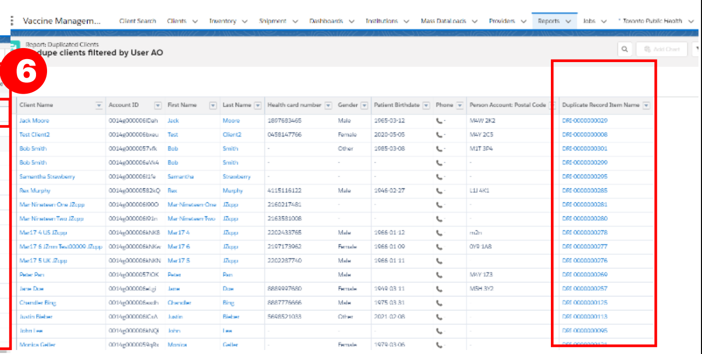
1. Navigate to the "Reports" tab
2. Select "All folders" on the right-hand pane
3. Select "Duplicate Management" folder
4. There will be two reports available**:**

- *Dedupe Clients Sorted by PHU/AO*: list of duplicate clients grouped by PHU, including all AOs at that PHU
- *Dedupe Clients Filtered by User AO*: list of duplicate clients only at your Authorized Organization

5. Select the Report Name hyperlink to view each individual report

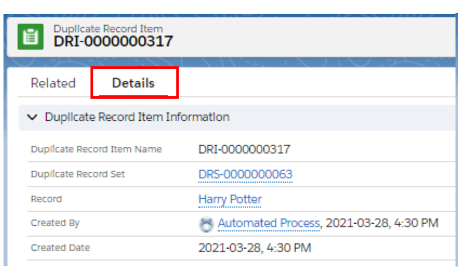


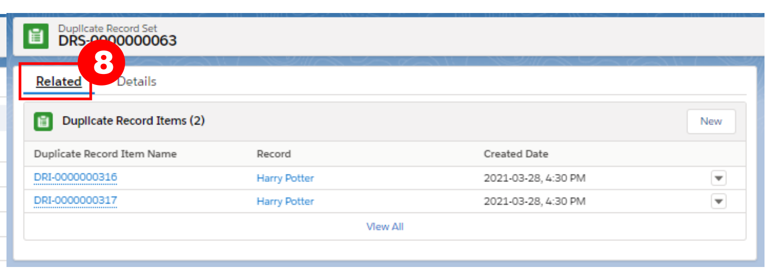




For either report, the user may see a specific duplicate record by following the instructions below:

6. Select the "Duplicate Record Item Name" on the right column for the client
7. Select the "Duplicate Record Set" hyperlink from the Duplicate Record Item
8. Select the "Related" tab of the Duplicate Record Set. This will show both client records that are linked as duplicates. Right click on the Client Name hyperlinks to open them into a separate browser. Review both records to determine next steps and if a client merge should be performed.





4. Merging Duplicate Client Records

Description: When a duplicate client record is discovered in the system, the two client records can be merged to eliminate the duplicate. If a duplicate record is not discovered in COVaxON, but a user would like to merge the client records, they can manually link duplicates and then merge the records.

COVax$_{ON}$ Edit Dose Admin Records & Merge Duplicate Clients Job Aid

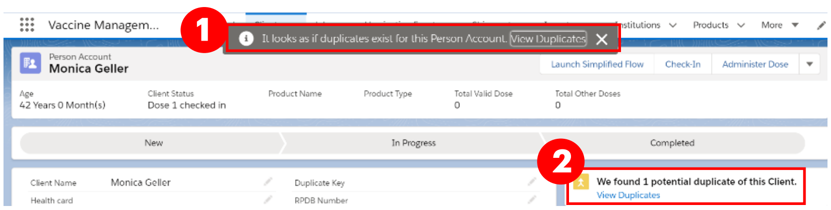
Target Role: Vaccine Administrator & Site Super User

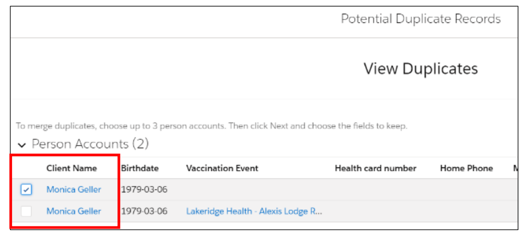
BOTH Site Super Users and Vaccine Administarors can perform the client merge functionality.

Note: Including the health card number for a client (if available) is the best defense against creating duplicate clients.

A. COVax$_{ON}$ Recognizes Duplicate Records

1. From the duplicate client record, a warning message will appear on the top of the record indicating that a duplicate exists.
2. It will also show that the client is a duplicate on the right-hand side of the record (for any newly created clients, or any previously created clients). Select "View Duplicates" and the duplicate client records will appear in a new window.

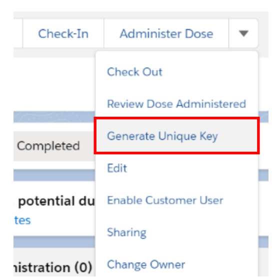




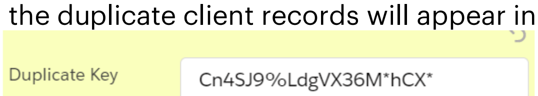
Modify Dose Administration Records: After reviewing and confirming the 2 records are in fact the same client, first check the Dose Administration records on each record to determine if they are valid. This is because after a merge, any dose administration records from the non-surviving record will be saved to the surviving record. For any doses that are not accurate and should be cancelled, **the Dose Administration record status should be changed to "Invalid" or "Entered in Error"** (depending on the scenario) prior to performing the merge. Please refer to the steps in **section 2 above** for details on changing dose admin status to "Invalid" or "Entered in Error".

B. COVax$_{ON}$ Does Not Recognize Duplicate Records

If a duplicate is not detected in COVax$_{ON}$ (as seen in the screenshots above), **AND** it is confirmed that the 2 client records are in fact duplicates, there is an alternative method to recognizing them as duplicates:



1. From the client record that is identified as a duplicate, select "Generate Unique Key" from the dropdown arrow next to the "Check Out" button.
2. A "Generate Unique Key" window will appear. Select "Next"
3. This will add a "Duplicate Key" field to the current client record.
4. The User should then locate the 2nd client record that has been identified as a duplicate.
5. Paste the duplicate key from the 1st client's record, into the 2nd client's record. This will create a link between the 2 records in COVax$_{ON}$ and the "View Duplicates" option will appear. Select "View Duplicates" and the duplicate client records will appear in a new window.



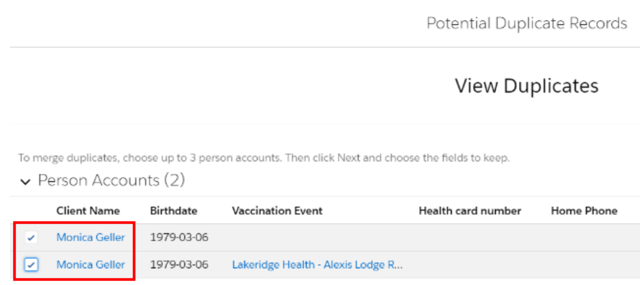
6. Right click on the client name hyperlinks and select "Open Link in New Window" for both clients.
7. Review the details on both client records to ensure that these two clients are in fact the same client. Validate details such as name, date of birth, address, etc.
8. Once, steps 1-7 are complete, the clients can then be merged (see steps below)

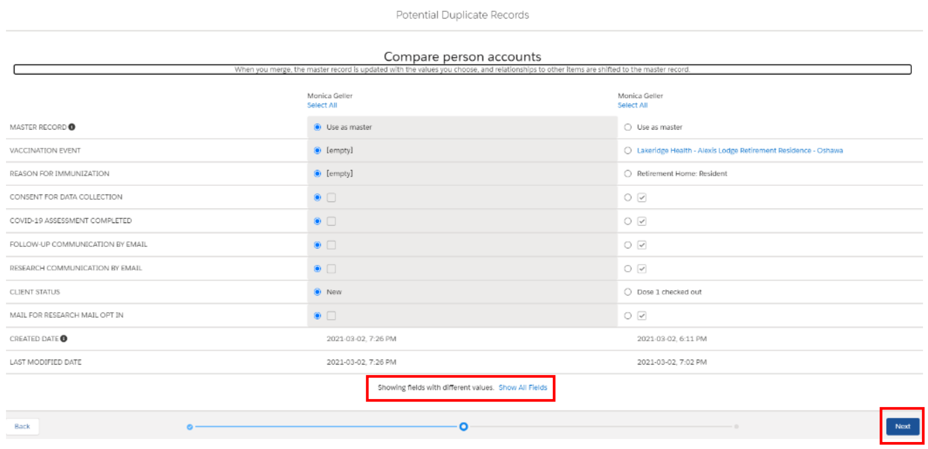
C. How to perform a client record merge in COVax$_{ON}$:

COVaxON Edit Dose Admin Records & Merge Duplicate Clients Job Aid

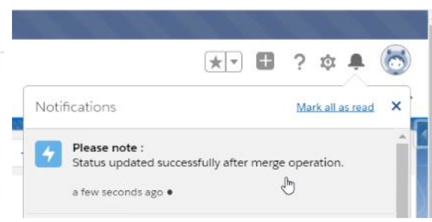
Target Role: Vaccine Administrator & Site Super User

1. Return to the “View Duplicates” screen
2. Select the checkbox for **both** client records
3. Select “Next”
4. Indicate which record should be considered the “master”. The master record will become the surviving records client name.
5. Indicate which fields should be saved on the master between the two records (i.e. which phone number, address, etc. should be saved on the surviving record). *Note: only the records that don’t match will appear from the main screen. You can select “Show All Fields” to review other fields on the client record. Refer to the “**Considerations for Merging Certain Fields”** section below for further details.*





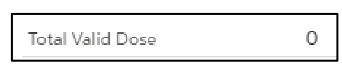
6. Once all correct values have been selected, Select “Next”
7. Select “Merge”. The merge typically happens immediately, but it may take up to 2 minutes. Refresh the client record to see the updates take place if there is a delay. In addition, a notification is sent to the user who performed the function that the merge was successful.



8. After a merge is completed, the duplicate key (if relevant) is automatically removed from the merged client record.

Considerations for Merging Certain Fields:

- Status of the surviving client record will not be based on what is selected from the “Compare person accounts” screen above. The Status of the client on the surviving record will be populated based on the number of dose administration records in status **“Administered”**. A field “Total Valid Dose” was added to the client record to support this logic. For example, if there are 2 Dose Administration records on a client record, in status “Administered” the Total Valid Dose field will display “2”.



The status of the surviving record will be populated based on the below:

- **Doses Administered:**
    - **0 “Administered” Dose Administration records resulting from merge:** the surviving client record status becomes **“New”** after merge
    - **1 “Administered” Dose Administration record resulting from merge:** the surviving client record status becomes **“Dose 1 Checked Out”** after merge
    - **2 (or more) “Administered” Dose Administration records resulting from merge**: the surviving client record status becomes **Dose 2 Checked Out** after merge

COVaxON Edit Dose Admin Records & Merge Duplicate Clients Job Aid

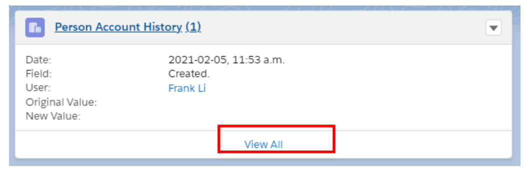
Target Role: Vaccine Administrator & Site Super User

  - **Note:** in practice, there should not be more than 2 doses in "Administered" status on the surviving client record since the User should modify any inaccurate doses prior to performing the merge.
- **PHU/Postal code**: these two fields must be selected as a "pair" (both selected from the same client record). This is because the PHU field is populated automatically based on the postal code.
- **Email Notifications**: clients will receive a notification email with the link to CANVAS research if the merge results in the checkbox being selected on the surviving record AND the surviving client record is in status **"Dose 1 Checked Out"**
- On the merge client screen, when selecting the Master Record and the values that should remain on the surviving client record, the "Reason for Immunization" field must be from the Master record.

History of the Merge/Restoring the Merge

The history of the fields of the non-surviving record can also be viewed from Client History:

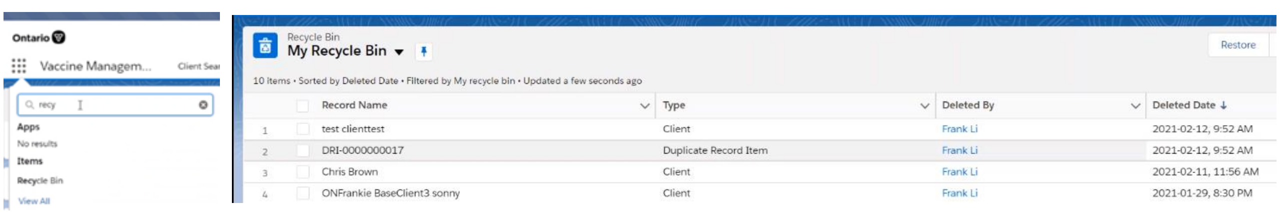
1. From the new client, in the Account History section on the main record, select "View All"



2. The history shows the original value and the new value:

3. After a merge is completed, the non-surviving record can be accessed from the Recycle Bin. It will no longer contain any dose administration records since they were merged with the surviving record. If an incorrect merge was performed on a client with a dose administration record, there is no current solution built in this release to move the dose administration record back to the deleted client. It is essential that the clients are reviewed in detail prior to performing a merge.

4. **To restore a deleted client:** Select the 9 dots, search and select "Recycle Bin". The recycle bin is emptied every 15 days, so 15 days after the merge, the old record will not exist. Locate the non-surviving record. Select the checkbox and select "Restore". This should only be done when it is confirmed the merge was a mistake and is not in fact a duplicate client.

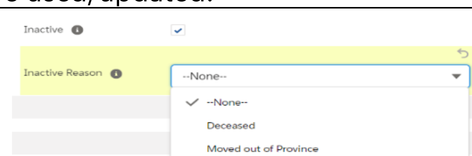


4. Marking Clients as Inactive

Description: On the client record, they can be marked as 'Inactive' and this will remove the client's name from any list views on the "Clients" tab, and the client record will no longer be used/updated.

How:

1. Go to the desired client's record
2. Select the checkbox next to "**Inactive**"
3. Select an "**Inactive Reason**" from the drop-down



When a client is marked as "Inactive" Users will not be able to administer doses to them. If the client has been incorrectly marked as "Inactive", users can go to the client record and uncheck the box.

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.