

COVaxON Inventory Management Job Aid

Target Role: Inventory Manager

<p>Role Description: Responsible for creating shipment and inventory records, linking inventory to VEs, transferring inventory, recording wastage, excursion, and recall events in the COVaxON system.</p> <p>Permission Level: COVax Inventory Manager</p> <ul style="list-style-type: none"> Edit-Access for Shipment, Inventory, & Storage Location tabs Read-Only Client Profile View Dashboards and the Linked Reports Read and Export Vaccine Inventory Report & Summary Client and Dose Administration 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 the COVaxON system</i> <i>For details about COVaxON user access, refer to the "Login, Logout, and User Settings" job aid</i> 	

Inventory Management Scenario Overview

Inventory is managed by Authorized Organizations (AOs), which typically includes three scenarios:

- 1. For Hospitals/Clinics Receiving Inventory:** Shipments are received and inspected upon arrival. Inventory Managers will create a shipment and inventory record for each Lot# of inventory received which will be used for vaccinations at the clinic. The Public Health Unit (PHU) may request the hospital to act as a Vaccine Depot where they may manage and allocate inventory to other Vaccination Events such as Long-Term Care Homes.
- 2. For Public Health Units (PHUs) receiving inventory on behalf of LTCHs, RHs and NHs:** Shipments are received by the PHU at their main office storage, acting as the Vaccine Depot where they will be inspected, and shipment and inventory records will be created in the system to reflect what is received. After the initial shipment of inventory arrives at the PHU, they may allocate inventory to Vaccination Events such as Long-Term Care Homes and Primary Care Physician locations
- 3. Pharmacies Receiving Inventory:** Shipments are received and inspected upon arrival. Pharmacy Inventory Managers will create a shipment and inventory record for each Lot# of inventory received at the AO (each individual pharmacy store is considered to be an AO) which will be used for vaccinations at the pharmacy. Inventory Managers will then allocate inventory to the pharmacies Vaccination Event (VE).

Inventory Management Activities

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

MODULE 1 – Inventory Set Up		
Section	Description	Link(s)
1. Create Shipment Records	Create a shipment record to document details in the system.	Create Shipment Records
2. Create Inventory Record	Create inventory record associated to shipment in the system	Create Inventory Record
3. Linking inventory to a Vaccination Event	(Part I) Linking inventory to a Vaccination Event: Allocate the inventory at the Authorized Organization (AO) to a Vaccination Event (VE).	(Part I) Linking inventory to a Vaccination Event
	(Part II) Modifying a VE Inventory: Staff at the VE to track and update the VE inventory.	(Part II) Modifying a VE Inventory
4. Reconciling the Authorized Organization Inventory based on activities at the Vaccination Event(s)	Quantity adjustments that occur at the VE level must be communicated to the inventory manager at the AO level	Reconciling the Authorized Organization Inventory based on activities at the Vaccination Event(s)

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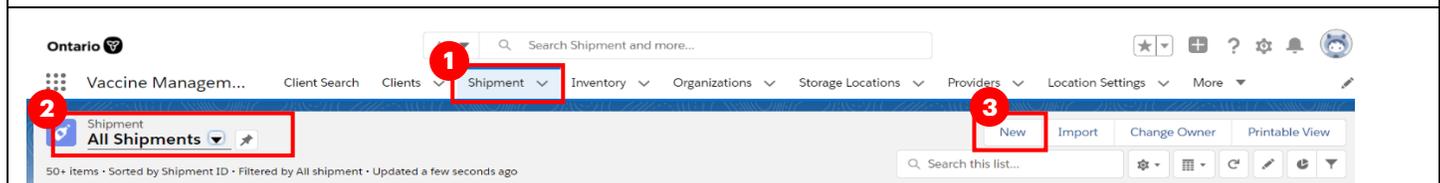
MODULE 2 - Ad hoc Inventory Activities		
Section	Description	Link(s)
5. Transferring Inventory	Transfer the appropriate amount of inventory to another AO	Transferring Inventory Accepting Inventory
6. Accepting Inventory Transfer		
7. Creating Storage Locations	Create storage locations for inventory if it does not already exist in the system	Creating Storage Locations
8. Recording Wastage	Record wastage that occurs through AO/VE operations	Recording Wastage
9. Excursion Events	Record an excursion event that occurred at a specific storage location	Excursion Events
10. Adjusting Total Doses	Adjust inventory quantity if required	Adjusting Total Doses
11. Managing Recalls	When a product is recalled, COVaxON inventory records should be updated to reflect this	Managing Recalls
12. Rescinding a Recall	If the inspection was cleared with no safety issues, Super Users can rescind the recall	Rescinding a Recall

MODULE 1: INVENTORY SET UP

For a new Lot# of inventory that has been received at an Authorized Organization, create a shipment record, then create an inventory record associated to that shipment. For vaccines requiring a diluent, a separate shipment record and associated inventory record(s) should be created for the diluent.

1. Creating Shipment Records

Description: After a shipment is received and inspected, create a shipment record to document the shipment information in the COVaxON system.



How:

1. Go to the "Shipment" tab
2. Select "All Shipments" from dropdown
3. Select "New"

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4. Fill in the details of the new shipment
5. Select "Save"

Note: all quantities with regards to inventory within COVaxON are measured in doses, not vials. The amount of doses per vial differs between vaccine types.

Shipment Record Details:

The information listed below with an asterisk is considered mandatory. If the user tries to save the record with any of the below information missing, COVaxON will return an error.

- **Shipment ID:** will be pre-populated based on the numerical order of creation.
- **Authorized Organization*:** Use the search bar to indicate the Authorized Organization (AO) responsible for the inventory. This is a mandatory field and must match the AO as on the User's profile.
- **Product*:** This is a lookup field for products that already exist within the system (i.e. "PFIZER-BIONTECH COVID-19 mRNA PB", or "MODERNA COVID-19 mRNA-1273" or "COVISHIELD COVID-19 Non-rep VV")
Note: products are pre-loaded and do not need to be created (only selected from shipments and inventory). To view the products available, navigate to the "Products" tab.
- **Quantity Received*:** Indicates number of doses received.
- **Temperature (°C):** Temperature of shipment.
- **Status:** In most cases the status should be "Received", but if part of the shipment was rejected, the status could be "Partially Received". If Inventory managers are creating shipments before they arrive at their location, they can set the status to "New" or "In Transit" and then update the status once physically received.
- **Requisition ID:** Can be entered if known for traceability.
- **Total Shipped Quantity*:** Enter quantity of doses that was shipped and planned to be received.
- **Damaged Quantity:** Indicate the quantity of damaged doses (if any) that is recognized during shipment inspection.
- **Reason:** Indicate any reason(s) for damage (if any). Users can use the arrows to toggle items between the "Available" and "Chosen" columns.



Further Context

- The Pfizer Vaccine product name has been altered to follow the naming convention "PFIZER-BIONTECH COVID-19 mRNA PB."

2. Creating Inventory Records

Description:

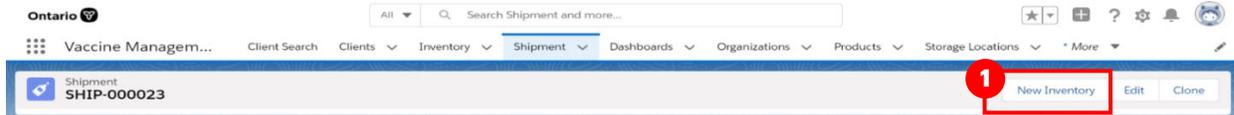
Once shipment record is created, create an inventory record(s) at the AO level that is associated to the shipment. AO Inventory records should be created for each vaccine type and diluent (Pfizer only) inventory Lot# that is received. A specific Lot# of inventory can be managed by one Authorized Organization and linked

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to multiple Vaccine Events. As doses are administered during the Vaccination Event, doses will automatically decrement from the associated AO Inventory record.

1. After creating a shipment, you will be brought to the shipment's page. Select **"New Inventory"**



2. Fill in new inventory details:

- **Inventory Name***: Input "test" and continue filling out the other fields. Once saved, this will auto populate with the below naming convention:
[Product Trade Name] [Dosage] [Unit of Measure] - [Lot# Number] [Expiry Date] Product Trade Name, Dosage and Unit of Measure are pulled from the product record associated with the inventory. Lot# Number and Expiry Date are pulled from the fields on the inventory record.
- **Status***: Select "Available" to make the inventory available for administration
- **Lot Number***: Associated with the batch of inventory for traceability
- **Product**: Will be pre-populated based on the shipment
- **Storage Location**: Use this search field to identify the storage locations already created in the system (for example: Lakeridge Health Oshawa – Freezer 1). If the accurate storage location does not exist in the system, refer to [Section 7: Creating Storage Locations](#).
- **Authorized Organization***: Use the search bar to indicate the Authorized Organization (AO) the inventory is associated to (the party responsible for managing the inventory). This is a mandatory field and must match the AO on the User's profile
- **Shipment**: Will be pre-populated with the shipment record
- **Received Doses***: Input the quantity of doses associated with this Lot# (same quantity as the shipment)
- **Expiration Date***: YYYY-MM-DD

A screenshot of the 'New Inventory' form in the COVaxON system. The form is titled 'New Inventory' and contains several fields: 'Inventory Name' (text input with 'test'), 'Authorized Organization' (dropdown menu with 'Toronto Public Health'), 'Status' (dropdown menu with 'Available'), 'Lot Number' (text input with '00001'), 'Product' (dropdown menu with 'PFIZER-BIONTECH COVID-19 mRNA PB'), 'Expiration Date' (calendar icon with '2021-05-12'), 'Received Doses' (text input with '2,000'), and 'Storage Location' (dropdown menu with 'Metro Toronto Convention Centre Fridge 1'). At the bottom right, there are 'Cancel' and 'Save' buttons. A red box surrounds the entire form, and a red circle with the number '2' is in the top left corner.

3. Select **"Save"**

Key Tips

- Within the inventory record, there is an option to add files to the record (for example, a temperature logger). This can be done from the right side of the inventory record by selecting "Upload Files"
- The **"Total Doses"** field is not editable (read-only) and is calculated based on **"Received Doses"** plus or minus any form of adjustments. Hover over the "i" button for exact details on the calculation. For any future adjustments made to the inventory record (for example, extra doses from vial, no consent doses, etc.), the "Received Doses" will modify the "Total Doses" field automatically.

Authorized Organization	AuthOrg-PHU-Lakeridge
Location	Lakeridge Health Oshawa - Floor 5 - Freezer N
Storage Location	Lakeridge Health Oshawa - Floor 5 - Freezer N
Dose Information	
Total Doses	312

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3. (Part I) Linking Inventory Records to Vaccine Events

Description:

Super Users or Inventory Managers will link existing inventory records at the Authorized Organization to a Vaccination Event. This allows Vaccinators to be able to select the inventory when administering doses to clients. The act of linking existing inventory records creates a **“Vaccine Event Inventory”** record associated to a specific Vaccination Event, which is tied to a main Authorized Organization inventory record. As doses are administered, it **decrements from the “Doses Available” from the linked Authorized Organization inventory record**. One Authorized Organization inventory record can be associated to multiple Vaccination Event Inventory records.

How:

1. Allocate Inventory to the Vaccination Event by going to the desired AO Inventory Record, and selecting the arrow next to **“Event Inventories”**
2. Select **“New”**
3. Enter in the details for the inventory being used at the VE:
 - **VE Inventory Name:** Input **“test”** and continue filling out the other fields. Once saved, this field will auto populate with the same name as the linked AO inventory in the **“VE Inventory Name”** field
 - **Vaccination Event:** Search and select the Vaccine Event to link the inventory to
 - **Inventory:** This field will be auto populated with the inventory associated to that AO (this is the **“linked”** inventory that will be decremented as doses are administered)
 - **Allocated Doses:** enter the # of doses being allocated to that Vaccination Event
 - **VEI Status:** Select Active to make it available for administration

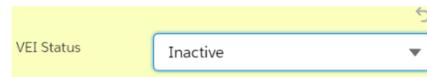
The screenshot displays the COVaxON interface for linking an inventory record to a vaccine event. The top section shows the 'Inventory' details for 'PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001, 2021-05-12'. The 'Event Inventories (0)' dropdown is highlighted in red. The bottom section shows the 'New Vaccine Event Inventory' form with the 'VE Inventory Name' field containing 'test' and the 'Inventory' dropdown selected with the same inventory record. The 'VE Inventory Name' field is also highlighted in red.

Key Tips

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- Other fields such as “Doses Wasted”, “Extra Doses from Vial”, “Non-consent Doses”, are not used initially when creating a VE inventory record. These fields are part of VE operations and are described below.
- Users may link the same AO inventory record to multiple Vaccine Events by allocating various amounts of that Lot # across various VEs, if it remains within the same Authorized Organization.
- Provided that the inventory remains within the same Authorized Organization, Users are no longer required to transfer, accept, or reject inventory, instead they are able to link AO inventory to associated VEs. Transfers may still occur between AOs, refer to [Section 5 “Transferring Inventory”](#) and [Section 6 “Accepting Inventory”](#) below for more details on this.
- If a Vaccine Event Inventory should not be made available for administration from the VE, the Inventory Manager/Super User can change the status of the Vaccine Event Inventory to “Inactive”.



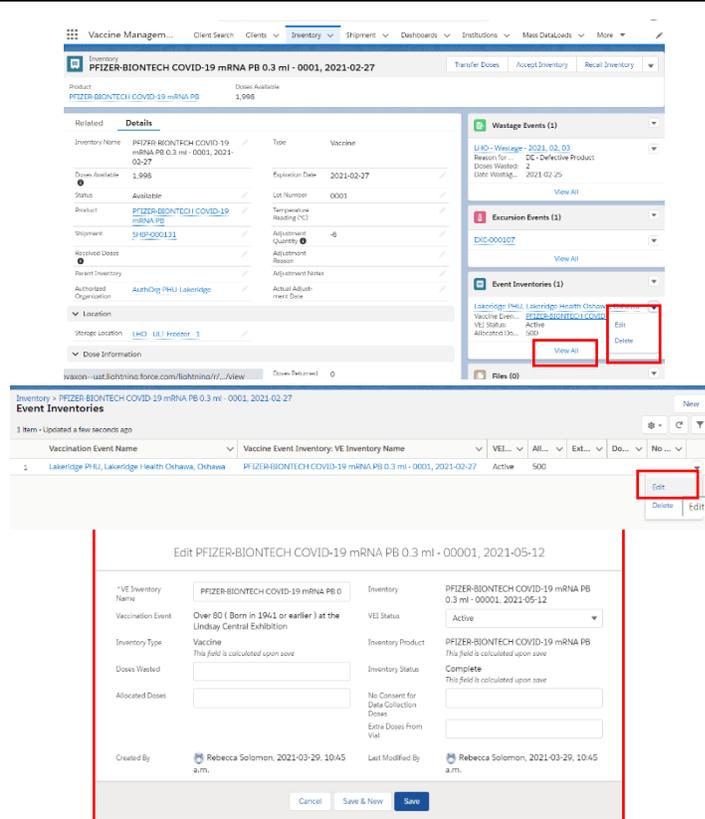
3. (Part II) Modifying Vaccine Events (VE)

Description:

On a regular basis, staff at a Vaccination Event (VE) (Super Users/Inventory Managers) should track and update the Vaccine Event inventory from the inventory tab based on any wastage, adjustments, etc., that occur at the VE. The updates to the Vaccination Event Inventory do not automatically update the dose quantities on the main AO inventory record linked to the VE. Section 4 outlines how this can be done.

How:

1. From the “**Inventory**” tab, search and select the AO inventory record that was linked to the VE. The record can be edited by selecting the arrow and selecting “**Edit**”. If you don’t see the relevant inventory, select “View All” and find and edit the record from that view.
2. Edit the relevant quantities for the following fields:
 - **Doses Wasted:** enter quantity of doses wasted through clinical operations
 - **No Consent for Data Collection Doses:** Enter quantity of clients that were administered a dose outside of COVaxON (in the scenario that they did not consent to data collection in COVaxON, but still received a dose, Users must account for one less dose in the system’s inventory)
 - **Extra Doses from Vial:** enter quantity of extra doses achieved from vials
3. Select “**Save**”



- The “Extra Doses from Vial” & “No Consent for Data Collection” fields are cumulative. Each day as new quantities are identified; Users must add them to the existing quantity in the field.

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- Inventory managers who own the main AO Inventory record will be provided with the relevant information so they can reconcile the adjustments from the Vaccine Event Inventory to the main AO Inventory. **See Section 4 “Reconciling the AO Inventory based on Activities at the VE”** for these instructions.

4. Reconciling the Authorized Org. Inventory based on Activities at the Vaccination Event

The Inventory Manager/Super User at the Authorized Organization should reconcile the AO inventory regularly based on any updates made to the VE inventory described above (i.e. wastage, adjustments, etc.).

For the Inventory Manager at the AO to make the required adjustments, they will require information from the staff at the VE outside of COVaxON. This could include a screenshot of the VE inventory with the quantities that have been updated, including additional details related to those adjustments. For example, along with the screenshot, notes such as “5 doses wasted due to broken vials on 2.25.2021”.

The AO Inventory Manager can select “View All” under “Event Inventories” from the Vaccination Event to see a full list of inventory records and adjustment quantities entered. They can select a specific inventory and under the “Related Tab” of that Vaccine Event Inventory, they can see a history of all changes made to the inventory.

The screenshot displays the 'Vaccine Event Inventory' interface. At the top, it shows 'MODERNA COVID-19 mRNA 0.5 ml - EH1234, 2021-06-30'. Below this, there are two tabs: 'Related' and 'Details'. The 'Details' tab is active, showing fields for 'VE Inventory Name', 'Vaccination Event', 'Inventory Type', 'Doses Wasted', 'Allocated Doses', 'Inventory Status', 'Inventory Product', 'Inventory Status', 'No Consent for Data Collection Doses', 'Extra Doses From Vial', 'Created By', and 'Last Modified By'. Below the details, there are two tables. The first table, 'Vaccine Event Inventory (2)', lists 'Vaccine Event Inventory: VE Inventory Na...', 'VEI Status', 'Allocated Doses', and 'Extra Doses From Vial'. The second table, 'Vaccine Event Inventory (2)', is similar but includes a 'View All' link. At the bottom, there is a 'Vaccine Event Inventory History (3)' section showing a list of changes with columns for 'Date', 'Field', 'User', 'Original Value', and 'New Value'.

MODULE 2: AD HOC INVENTORY ACTIVITIES

The following activities should be completed on an as-needed basis by Inventory Managers.

5. Transferring Inventory

Description:

Any transfers conducted within COVaxON would be only if inventory is transferred from one Authorized Organization to another Authorized Organization (for example, a transfer of ownership between two PHUs). Each pharmacy is considered to be an individual AO. **Doses will not be transferred between individual Pharmacies.**

How:

- Select the “Inventory” tab
- Ensure “All Inventory” is selected from the dropdown.
- If necessary, use the search bar to locate the inventory that is being transferred.

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4. Click on the relevant inventory record (initial inventory record from the shipment to the Vaccine Depot; PHU or hospital).
5. From the inventory's page, select **"Transfer Doses"**
6. A pop-up will appear. Populate the **"Transferring to Authorized Organization"** field with the Authorized Organization name.
7. Populate the **"Total Number of Doses"** with the number of doses being transferred
8. Click **"Next"** & **"Next"** again & then **"Finish"**

The screenshot displays the COVaxON Inventory Management interface. At the top, the 'Inventory' menu is highlighted with a red circle (1). Below it, the 'All Inventory' dropdown is highlighted with a red circle (2). A search bar contains the text '00001' and is highlighted with a red circle (3). The main content area shows an inventory record for 'MODERNA COVID-19 mRNA-1273 0.5 ml - LK0004, 2021-05-31'. The 'Transfer Doses' button is highlighted with a red circle (5). Below this, a form is shown with two fields: '* Transferring To Authorized Organization' with the value 'Kingston General Hospital' (highlighted with a red circle 6) and '* Total Number of Doses' with the value '100' (highlighted with a red circle 7). A 'Next' button is visible at the bottom right of the form.

Further Context

- To identify any inventory transfers you have sent from your AO, select the **"Pending Transfer Inventory"** list from the dropdown to view this list
- An error message will return if a user tries to transfer more doses than are available – i.e. if you have 1500 doses to at the primary location, but you try to transfer 1600 doses to another location, you will receive an error
- If Users needed to confirm the correct name of the Authorized Organization they are transferring to, refer to the Authorized Organization tab.
- If a transfer was made from a primary AO to a second AO, and doses need to be returned to the primary AO, an inventory adjustment should be made instead of a transfer. Also, for any transfers that should not be accepted, the reject functionality should not be used. It is recommended for the receiving site to accept the transfer, and for both sites to create adjustments to reflect the accurate inventory quantities.
- When a transfer is completed, the "Relocated Doses" field on for the sending AO will be updated with the total amount of doses that has been relocated. The number of doses that have been transferred out of the AO will be decremented from the "Total Doses" field.

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Before transferring:	After transferring 3 doses:
<p>▼ Dose Information</p> <p>Total Doses 10</p> <p>Extra Doses from Vial</p> <p>Doses Administered 0</p> <p>Doses Pending 0</p> <p>No Consent for Data Collection Doses</p> <p>Doses Returned 0</p> <p>Total Doses Wasted 0</p> <p>Doses Wasted due to Expirations</p> <p>Doses Relocated</p> <p>Doses Impacted by Shipment Incident 0</p>	<p>▼ Dose Information</p> <p>Total Doses 7</p> <p>Extra Doses from Vial</p> <p>Doses Administered 0</p> <p>Doses Pending 0</p> <p>No Consent for Data Collection Doses</p> <p>Doses Returned 0</p> <p>Total Doses Wasted 0</p> <p>Doses Wasted due to Expirations</p> <p>Doses Relocated 3</p> <p>Doses Impacted by Shipment Incident 0</p>

6. Accepting Inventory

Description: The receiving Authorized Organization (AO) will need to accept the transfer of inventory.

How:

1. Return to the “**Inventory**” tab
2. To identify any inventory transfers that are awaiting acceptance within your AO, select the “**Receive Pending Transfer Inventory**” list from the dropdown
3. Select the inventory item that is tagged to the receiving AO
4. From the Inventory’s page, select “**Accept Inventory**”
5. Click “**Next**”

The screenshot shows the Ontario COVaxON Inventory Management interface. The 'Inventory' tab is selected (1). The 'Receive Pending Transfer Inventory' dropdown is open (2). A table lists inventory items, with one item selected (3). The 'Accept Inventory' button is highlighted (4). A modal window titled 'Accept Inventory' is shown with a 'Next' button (5).

Inventory Name	Transferring To Org	Shipment	Product Trade N...	Lot Nu...	Status	Tot...
COVID-19 Moderna Vaccine Mod 0.3 ml - OH564, 2022-05-31	AuthOrg-PHU-Lakeridge	←	ModernaVaccine	OH564	Pending for Transfer	60
COVID-19 Moderna Vaccine Mod 0.3 ml - OH564, 2022-05-31	AuthOrg-PHU-Lakeridge	SHIP-000009	ModernaVaccine	OH564	Pending for Transfer	1

Inventory Name	Type	Expiration Date	Lot Number
PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001, 2021-05-12	Vaccine	2021-05-12	00001

Details:

- Inventory Name: PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001, 2021-05-12
- Doses Available: 2,000
- Status: Pending for Transfer
- Product: PFIZER-BIONTECH COVID-19 mRNA PB
- Shipment: SHIP-000253
- Received Doses: 2,000
- Parent Inventory
- Authorized Organization: Toronto Public Health

Buttons: Waste Events (0), Excursion Events (0), Event Inventories (1), Files (0)

Modal: Accept Inventory. Please click Next to accept this inventory. Next

6. Exit the window. To refresh the status and location of the transferred inventory, please click into the inventory’s shipment, then re-open the inventory record to see the updated status and location.

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Before Acceptance

After Acceptance

After Acceptance: (Note: it may take a few moments for the transfer to refresh in the system)

- The inventory’s status will move from **“Pending for Transfer”** to **“Available”** for the receiving location
- The inventory’s location will change from the primary location to the receiving location

Further Context

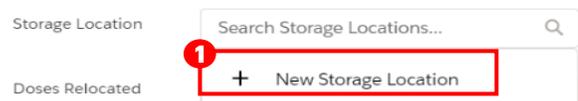
- Do not edit any fields on the received inventory record before the inventory has been accepted
 - If a user tries to update the status of the inventory from “Pending for Transfer” to “Available” before it has been properly accepted at that site, the inventory transfer will fail.
 - If a user tries to create an event (i.e. a wastage event) for the inventory before it has been properly accepted at the new site, the event will be unsuccessful
- If a transfer was made from a primary AO to a second AO, and doses need to be returned to the primary AO, an inventory adjustment should be made instead of another transfer. Also, for any transfers that should not be accepted, the reject functionality should not be used. It is recommended for the receiving site to accept the transfer, and for both sites to create adjustments to reflect the accurate inventory quantities.

7. Creating Storage Locations

Description:

When populating the Storage Location field in an inventory record, if the accurate location does not exist in the system, use these steps to create a new location.

1. From the **“New Inventory”** window (shown in [section 2](#) above), after searching, if the accurate storage location does not exist in the system, select **“New Storage Location”**. A new window will open called **“New Storage Location”**



2. Fill in New Storage Location details:

- **Storage Location Name***: the naming convention may differ for each location, for example: *Toronto General Hospital – Floor 1 – Fridge 1*

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- **Authorized Organization:** Use the search bar to indicate the Authorized Organization the inventory is associated to. This is a mandatory field and must be the same AO as on your User profile.
- **Storage Type:** Indicates how the inventory is being stored (select from dropdown)
- **Storage Capacity:** Number of doses that the storage location can hold (UOM: doses)
- **Temperature:** Temperature of storage location (UOM: Celsius)

The screenshot shows a 'New Storage Location' form with the following fields: 'Storage Location * Name' (LHO - Fridge 1), 'Storage Type' (Refrigerator), 'Authorized Organization' (AuthOrig:PHU-Lakeridge), 'Storage Capacity' (2,000), and 'Temperature' (-60). The 'Save' button is highlighted with a red circle '3'.

3. Select **“Save”**. The storage location will be saved, and you will return to the New Inventory window. The storage location you created will be auto populated into the **“Storage Location”** field.

8. Recording Wastage

Description: When wastage occurs and is identified through operations, use this functionality to record wastage from the Inventory tab.

How:

1. Go to the **“Inventory”** tab
2. Select **“All Inventory”** from dropdown
3. Select the desired inventory you wish to update. You can use the search bar to aid in your search. This will bring you to a specific inventory asset’s page

The screenshot shows the Vaccine Management application interface. The 'Inventory' tab is highlighted with a red box and a red circle '1'. The 'Available Inventory' dropdown is highlighted with a red box and a red circle '2'. The search bar is highlighted with a red box and a red circle '3'.

4. From the inventory’s page, select the dropdown next to **“Wastage Events”** and select **“New”**. 4a) **Note:** If the vaccine inventory is not in the status **“Available”**, the user will not be able to report a wastage event. When the user goes to save the wastage event, they will receive an error message and will be unable to save the event. To proceed, the user will need to return to the inventory record and select the status **“Available”** to log the wastage event.

5. Fill in details of Wastage Event

- **Wastage Event Name*:** Follow naming convention: [Location]-[Date]-[#] (“#” would be if there are more than one wastage event for this Inventory per day)
- **Vaccine*:** Use this search field to identify which vaccine you are recording wastage for
- **Reason for Wastage*:** Select reason for wastage from dropdown list
- **Date Wastage Occurred:** YYYY-MM-DD
- **Doses Wasted:** Enter number of doses wasted
- **Entire Vaccine Inventory Wasted:** Checkbox if it was the entire Lot#

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6. Select “Save” or “Save & New” for multiple wastage events

The left screenshot shows the 'Wastage Events (0)' list with a 'New' button circled in red and labeled '4'. Below it, a form for creating a new event is shown with a 'PFIZER-BIONTECH COVID-19 mRN' vaccine selected. A red error message 'We hit a snag.' is displayed, with 'Review the following fields' pointing to the 'Vaccine' field, labeled '4a'. The right screenshot shows the 'New Wastage Event' form with fields for Name, Reason for Wastage, Date, and Doses Wasted. The 'Save & New' button is circled in red and labeled '6', and the 'Save' button is labeled '5'.

Further Context

- The amount of “Doses Wasted” entered will automatically drawdown the available inventory of that item
- There are 2 methods for recording wastage in the COVaxON system. It can also be recorded from the Inventory tab, by selecting the button on the top right called “Report Wastage”. Both methods are acceptable for use.
- If a wastage event is unintentionally created, this can be rectified by editing the wastage event and changing the “Doses Wasted” number to be 0. The doses will then be added back to the “Available” doses. The wastage event will not be deleted.
- From the inventory record, the User can select “View All” under Wastage Events to see the full list of Wastage Events. The columns on this related list have been modified
- If less doses than expected were yielded from a vial (i.e. all Pfizer vials are supposed to yield 6 doses, but if only 5 yielded then a wastage event can be created if less than 6 doses are extracted from a vial to adjust the inventory, using the “WR - ID - Insufficient Dose(s) From a Single/Multi-Dose Vial” wastage reason.

The screenshot shows the 'Wastage Events (1)' list with a single event: 'Broken Vials Lakeridge 1.2.2021' with 'Doses Wasted: 0'. The 'View All' button is circled in red, and the 'Edit' and 'Delete' buttons are also circled in red.

9. Excursion Events

Description: In the case of an Adverse Storage Condition (ASC) that impacts all or a portion of a Lot# of inventory, the “Report Excursion” functionality can be used to record this. Please note that all excursion events will undergo an inspection by the PHU before being validated in COVaxON.

Note: If the vaccine inventory is not in the status “Available”, the user will not be able to report an Excursion event. If they try to create an excursion event, they will be unable to select the vaccine inventory and instead, they will receive the error shown. To proceed, they must return to the inventory record and set status to “Available”.

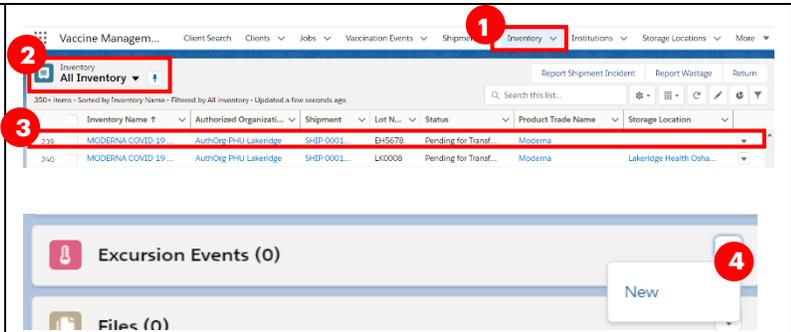
The screenshot shows the 'Wastage Events' form with an error message 'We hit a snag.' and 'Review the following fields' pointing to the 'Vaccine' field.

COVaxON Inventory Management Job Aid

Target Role: Inventory Manager

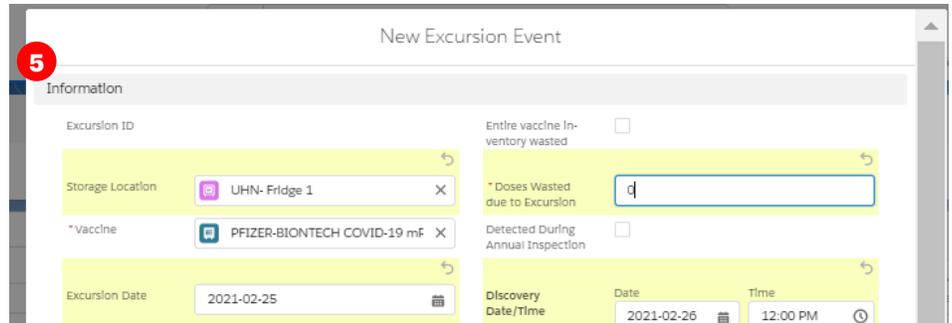
How:

1. Go to the "Inventory" tab
2. Select "All Inventory" from dropdown
3. Select the desired inventory you wish to record an excursion event for. You can use the search bar to aid in your search. This will bring you to a specific inventory assets page.
4. From the inventory's page, select the dropdown next to "Excursion Events" and select "New".

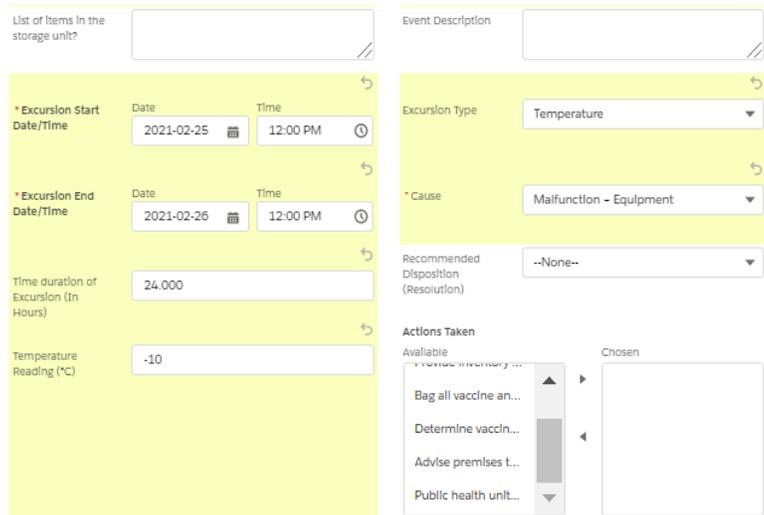


5. Fill in the details of the Excursion Event:

- **Storage Location:** Use search bar to indicate which storage location experienced the excursion event
- **Vaccine*:** Will be auto populated based on the inventory record selected earlier
- **Entire Vaccine Inventory Wasted:** Use checkbox to indicate if the entire inventory record was impacted by the excursion. **Do not fill in until after the inspection by the PHU.**
- **Doses Wasted Due to Excursion*:** This is a mandatory field. However, the PHU investigates all excursion events upon submission. Therefore, when filling in excursion event information, enter "0" wasted doses until the PHU has approved the event. Once approved, update the excursion field for the correct number of doses wasted. This field
- **Detected During Annual Inspection:** Check this box if the event was found during Annual Inspection
- **Discovery Date/Time:** Input when the Inventory Manager discovered the excursion



- **Excursion Date:** Select the calendar icon to choose the date of the excursion
- **Excursion Start Date/Time*:** Time when the temperature went out of range
- **Excursion End Date/Time*:** Time when the temperature was set back in range
- **Time Duration of Excursion (hours):** Time elapsed between start time of excursion and end time
- **Excursion Type:** Select "Temperature"
- **Cause*:** Use the drop-down options to indicate the cause of the excursion
- **Recommended Disposition (Resolution):** Select viable or unusable from the drop down. **Do not fill in until after the inspection**
- **Actions Taken:** Select actions from the available category and use the arrows to move the applicable actions to "Chosen"



COVaxON Inventory Management Job Aid

Target Role: Inventory Manager

- **Temperature Reading (°C):** Indicate the temperature that the storage location was at during the excursion event
- **Max Temp During Excursion:** Indicate the highest temperature during excursion
- **Min Temp During Excursion:** Indicate the lowest temperature during excursion
- **Last Logged Temperature:** last temperature showing on the data log
- **Temp Last Logged Date/Time:** Enter date/time
- **Number of Times product was exposed:** Indicate # of times vaccine was exposed to an excursion event (1 = first time)
- **Duration of Product Exposure:** Indicate the total exposure the product has experienced by referencing the **“Time duration of Excursion”** and **“Number of times product was exposed”**
- **Datalogger Recording Sent for Assessment:** Select the checkbox if you have sent the log to the PHU for inspection
- **Monitor Type (Multi select):** Select the monitor type from the available options and use the right arrow to move the applicable option(s) to “Chosen” category
- **Reported By*:** Insert Inventory Manager who discovered the excursion event
- **Contact #:** Input telephone number for the owner of this record

6. Select **“Save”** or **“Save & New”** for multiple events

Note: If any of the **mandatory fields*** are not filled in when the user attempts to save the record, the system will produce an error and they will be unable to save the excursion event.

7. Return to the inventory record and change the status to **“Suspended for Vaccines”**. It should remain in this status *until the inspection of the event is complete.*

COVaxON Inventory Management Job Aid

Target Role: Inventory Manager

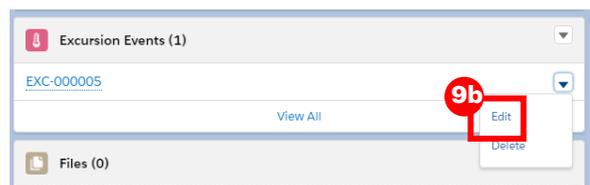
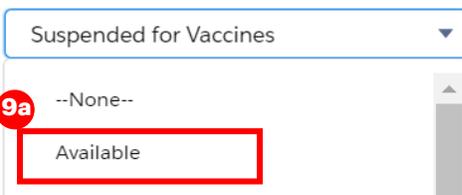
8. After/while creating the excursion event in COVaxON, contact the PHU to inform them of the excursion. The PHU will perform an inspection of the incident. While the inspection occurs, the doses remain in “quarantine”

9. The PHU will contact your hub/location with the inspection results. Once the investigation is complete, the record can be updated with the correct number of impacted doses, by editing the excursion event record

a) Since you are unable to edit an excursion record when the status of the inventory is not in “Available” status, you must update the inventory status to “Available” before editing the excursion record.

b) Select the drop down from the excursion event record and select “**Edit**”

- If all inventory was impacted by excursion: check “Entire vaccine inventory wasted” check box and indicate total number of doses wasted (these doses will automatically decrement from the total inventory available). See, *0 Doses Available on inventory record with the status changing to “complete”*. Also note the 9,144 wasted.
- If a portion of inventory was wasted, leave check box blank and only fill in the # of doses wasted field. The doses indicated will also decrement from the total available.
- If the entire inventory Lot# was unaffected from the excursion event, input “0 doses Wasted Due to Excursion”.



Total Doses Wasted	1
Doses Wasted due to Excursions	9,144
Doses Relocated	600
Doses Impacted by Shipment Incident	0

A red box highlights the "Doses Wasted due to Excursions" row, and a red circle with "9b" is next to it.

10. Indicate the “**Recommended Disposition**” as “**Viable**” or “**Unusable**” depending on if the entire inventory was impacted by the excursion or not

11. Select “**Save**” on the excursion record

12. If the inspection determines that not all the inventory was impacted, you may return to the inventory record and ensure the inventory status is set to “**Available**” for the remaining doses.



Further Context

- Excursion Events differ from wastage events as they specifically describe ASC (adverse storage condition) malfunctions. Therefore, excursion events are only meant for storage hubs that both store inventory specifically at their location and when the malfunction is storage related. Therefore, wastage that occurs at a location due to on-site error will be recorded as regular wastage events (see Section 8 above).
- If an excursion event is unintentionally created, this can be rectified by editing the excursion event and changing the “Doses Wasted due to Excursion” number to be 0. The doses will then be added back to the “Available” doses. The excursion event will not be deleted in the system and can still be viewed, however the doses wasted will be 0.

COVaxON Inventory Management Job Aid

Target Role: Inventory Manager

10. Adjusting Total Doses

Description:

Steps to adjust shipment and inventory records if the number of available doses requires an adjustment. For example, more doses than expected were extracted from a vial or an immunization was recorded in an offline process (ex. if a client did not consent to digital data capture).

The screenshot shows the COVaxON interface with the 'Inventory' tab selected. A search bar contains '2021-05-12'. A table lists inventory items, with the first item 'PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001, 2021-05-12' highlighted. Red callouts 1-4 indicate the 'Inventory' menu, the 'All Inventory' dropdown, the search bar, and the pencil icon for editing.

How:

1. Go to the **"Inventory"** tab.
2. Ensure **"All Inventory"** is selected from the dropdown.
3. Use the search bar to identify the inventory you would like to modify.
4. Select the relevant inventory and click the pencil icon to edit the following fields:
5. **"Adjustment Quantity"**: Enter the quantity for the adjustment and add the **"Adjustment Reason"**, **"Adjustment Notes"** and **"Actual Adjustment Date"**. This is used for any other discrepancies or adjustments required outside of **"Extra doses from vial"**, **"Wastage"**, and **"No Consent for Data Collection Doses"**. For example, when performing a physical count.
6. **Extra Doses from Vial**: Enter the quantity of extra doses from vial in this field and **add the "Adjustment Reason"**, **"Adjustment Notes"** and **"Actual Adjustment Date"**. Note: this will only be for Lot#'s of inventory received at 5 doses per vial. Since Pfizer has updated the vials to be 6 doses per vial, any shipments that had quantity received at 6 doses per vial will not require this adjustment.
7. **"No Consent for Data Collection Doses"**: Enter the quantity of clients that did not consent to data collection and were therefore have no dose administration tracked in COVaxON, and add the **"Adjustment Reason"**, **"Adjustment Notes"** and **"Actual Adjustment Date"**.
8. Select **"Save"**

The screenshot shows the 'Edit Inventory Item' form for 'PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001, 2021-05-12'. Red callouts 5-8 highlight the 'Adjustment Quantity' field (set to 10), the 'Dose Information' section (including 'Extra Doses from Vial' set to 7 and 'No Consent for Data Collection Doses' set to 3), the 'Recall Information' section, and the 'Save' button.

Further Context

COVaxON Inventory Management Job Aid

Target Role: Inventory Manager

- The inventory record contains tooltip pop-ups so users can better understand the calculations and definitions of each field.
- Users cannot modify the “Total Doses” field. Any updates to the “Adjustment Quantity”, “Extra Dose from Vial” and “No Consent for Data Collection” will update the “Total Doses” field appropriately
- If a transfer was made from a primary AO to a second AO, and doses need to be returned back to the primary AO, an inventory adjustment should be made instead of a transfer.
- When the inventory hits 0 doses available from being administered, the Inventory status will change to “Completed”. If the Inventory Manager has not adjusted the total doses available for that inventory based on additional doses achieved from a vial, there will be a misalignment between actual doses and the doses in the system. To avoid delays to administering doses, the Inventory Manager will need to change the status of the inventory to “Available”. Inventory can be administered if the doses available is 0 or negative, as long as the status is “Available”

11. Managing Recalls

Description:

There are offline processes for communicating and handling vaccine recalls:

- Manufacturer determines there is an issue with a specified Lot# and notifies Health Canada
 - Health Canada identifies that a specified Lot # had a higher AEFI rate than expected and notifies the provinces/territories
 - Public Health Ontario may identify the source of an issue with a specified Lot# and notify the ministry
- Health Canada (and often the manufacturer as well) will perform an investigation of the impacted Lot# and communicate to the Users (outside of the system) on next steps. **This is in the form of notice/recommendations to the province on further use of the vaccine (i.e. discard or lift the suspension so the vaccines can be distributed for use). Public Health Ontario/the Ministry of Health would inform the public health units who then inform their local providers (Users of COVaxON).** Each location has a **designated User (Super User or Inventory Manager)** responsible for reflecting recalls within COVaxON. The User will follow the below process to recall the vaccine within the COVaxON system. For any locations where the impacted Lot# was transferred, the inventory will need to be physically returned to the PHU and the User must recall all impacted inventory records.

COVaxON Inventory Management Job Aid

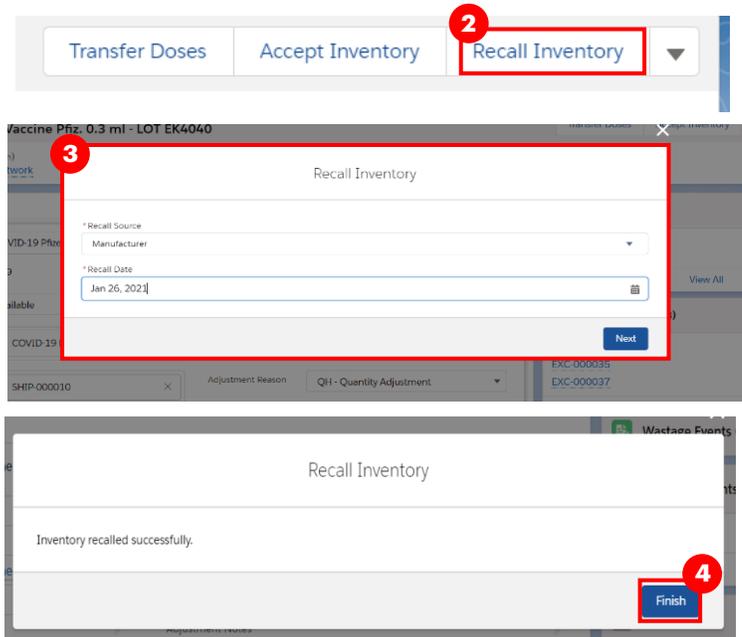
Target Role: Inventory Manager

How:

1. Identify the impacted Lot # that has been recalled and all the associated inventory records (including any quantity that was transferred as a new inventory record from that Lot# to another location).
2. On the inventory page go to the right-hand corner and select **“Recall Inventory”** button
3. Recall Source: Select “Health Canada”
Recall Date: Select the date that the Lot# was recalled.
4. Select **“Next”** and **“Finish”** the inventory recall record will then save, once saved the following occurs:
 - a. Available doses will now be set to 0 and in turn, the “Number of Doses Recalled” will be automatically populated with the previous number of doses that were available.
 - b. Inventory status will automatically update to “Recalled”

In the example to the right, the inventory record was comprised of 100 doses. Before the recall, 0 doses had been administered. Once the product was recalled, the inventory status changed to “Recalled” and the Doses Available became “0”.

Based on the “Recalled” status, vaccinators are now unable to administer additional doses, and under the Dose Information and Recall Information, users can see “100 Total Doses, 0 Doses Administered and 100 Doses recalled”.



Inventory	
PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001	
Product	Doses Available
PFIZER-BIONTECH COVID-19 mRNA PB	0
Related	
Details	
Inventory Name	PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001, 2021-05-12
Doses Available	0
Status	Recalled

Dose Information			
Total Doses	100	Doses Returned	0
Extra Doses from Vial		Total Doses Wasted	0
Doses Administered	0	Doses Wasted due to Excursions	0
Doses Pending	0	Doses Relocated	
No Consent for Data Collection Doses		Doses Impacted by Shipment Incident	0
Recall Information			
Recall Source	Health Canada	Recall Date	2021-01-26
Doses Recalled	100	Rescind Date	

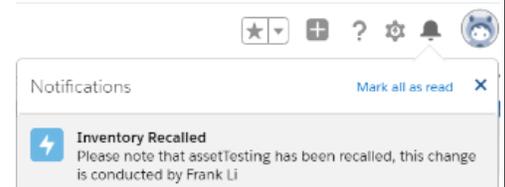
Further Context

- When a recall is saved, the Lot #'s of inventory that were recalled will be frozen, rendering the inventory unavailable for administration. Functions such as reporting wastage, reporting excursion, returning and transferring doses will also be unavailable. Therefore, the only way to “unfreeze” inventory is for a Super User to rescind a recall event (see section 12 below).

COVaxON Inventory Management Job Aid

Target Role: Inventory Manager

- When inventory status is set to “Recalled” it cannot be changed. Only Super Users will be able to update the status. Inventory Managers will be unable to edit a record once the status is changed from “Available” to “Recalled”.
- When the status of an inventory record is changed to “Recalled”, a notification will be sent to Super Users, Inventory Managers, Vaccinators, and Site Staff (not Users with the Dashboard profile) in COVaxON so they are aware the recall has been reflected in the system and can no longer select that Lot# or administer doses. The notification is in the format of: “Please note that [inventory name] has been recalled, this change is conducted by [last modified by]”
- When inventory is in the “Recalled” status, and additional doses are added to the “Total Doses” field, those additional doses will be added to the “Recalled Doses” quantity and will not be listed as available inventory. This can only be done by a Super User. The “Doses Available” inventory amount will continue to reflect 0 doses. This is to accommodate a situation whereby the number of total doses requires adjustment after a recall has already been made against that inventory. For example, when reconciling additional doses obtained from a vial, or other forms of inventory adjustments. Please note that the best practice is to conduct adjustments on a regular basis, to avoid any lag in the inventory quantities reflecting the accurate inventory quantities.



12. Rescinding a Recall

Description:

The PHU will advise of the outcome of the investigation and provide recommendations on the use of the vaccine (communication is done outside of COVaxON). If the investigation is determined to have no safety issues, they will notify all Users that the Lot# of inventory can be redistributed for administration (and the previous recall can be rescinded). Only Super Users have the ability to rescind an inventory recall.

How:

1. Change the status of the Inventory record from “Recalled” to “Available”
2. Enter the rescind date in the “Recall Information” section of the inventory page.
3. Select “Save”
4. The doses that were initially recalled will now be associated to “Doses Available”

Recall Information			
Recall Source	Recall Date	Recall Date	Recall Date
Health Canada	2021-03-02	Health Canada	2021-03-02
Doses Recalled	990	Rescind Date	2021-03-05

Note: If an inventory is recalled multiple times, users would need to remove the rescind date before recalling the inventory again. The history of the initial recall and rescind are captured in the Inventory History.

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.