Target Role: Inventory Manager

Role Description:

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Responsible for creating shipment and inventory records, linking inventory to VEs, transferring inventory, recording wastage, excursion, and recall events in the COVaxon system.

Permission Level: COVax Inventory Manager

- 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**



received, there are additional forms that you will need to use alongside the COVaxon system For details about COVax_{ON} user access, refer to the "Login, Logout, and User Settings" job aid

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

Μ	ODULE 1 – Inventory Set Up		
Se	ection	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).	<u>(Part I) Linking inventory to a</u> <u>Vaccination Event</u>
		(Part II) Modifying a VE Inventory: Staff at the VE to track and update the VE inventory.	<u>(Part II) Modifying a VE Inventory</u>
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)

Target Role: Inventory Manager

MODULE 2 – Ad hoc Inventor	y Activities	
Section	Description	Link(s)
 5. Transferring Inventory 6. Accepting Inventory <u>Transfer</u> 	Transfer the appropriate amount of inventory to another AO	Transferring Inventory Accepting Inventory
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, COVax _{ON} 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. * 🖬 ? 🌣 单 🐻 Ontario 😵 Q Search Shi 1 Vaccine Managem... Orga Client Search Clients ✓ Location Settings ✓ Pro 2 3 Import Change Owner Printable View All Shipments 👻 🖈 \$ • III • C' 💉 🙂 🔻 50+ items • Sorted by Shipment ID • Filtered by All shipment • Updated a few seconds Q. Search this list... How: 1. Go to the "Shipment" tab 2. Select "All Shipments" from dropdown 3. Select "New"

Target Role: Inventory Manager

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

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



Shipment Record Details:

Th 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.

Reason			
Available		Chosen	
DP-Damaged Prod	Â	•	
EX - Expired Product	1		
CCE - Cold Chain I		•	
	*		

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

Target Role: Inventory Manager

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SHIP-000023			New Inventory Edit Clone	
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continue filling out the other fields.		New Inventory		
Once saved, this will auto populate	* Inventory Name	Authorized	Organization	
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[Product Trade Name] [Dosage] [Unit of	• Status	Shiamaat		
Measure] - [Lot# Number] [Expiry Date] Product	Available	SHIP-00025	53	
Trade Name, Dosage and Unit of Measure are	*Lot Number	* Expiration (Date	
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nulled from the fields on the inventory record	• Product	* Received D	oses 🕕	
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Target Role: Inventory Manager

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:

- 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

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Key Tips

Target Role: Inventory Manager

- 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 <u>Section 5 "Transferring Inventory"</u> and <u>Section 6</u>
 <u>"Accepting Inventory"</u> 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:

- 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"

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Status	Available		Lot Number	0001		1	View All	
Product	PFIZER-BIONTECH COVID-: mRNA PB	2 /	Temperature Reading (*C)			1	Excursion Events (1)	
Shipment	SHIP-000131		Adjustment Quantity 0	-6		7	EXC-000107	
Received Doses			Adjustment Person			7	View All	
Parent Inventory			Adjustment Notes			7 6		
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VEI Status

Inactive

¥

• 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.

Target Role: Inventory Manager

 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 $COVax_{ON}$. 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.

ODERNA COVID-19 mRN 11234, 2021-06-30 keridge Health - Alexis Lo ssidence - Oshawa accine	A 0.5 ml - 🛛 🖉	Inventory	MODERNA COVID-19 mRNA 0.5 ml -	
keridge Health - Alexis Lo sidence - Oshawa accine	dge Retirement			
accine		Status	Active	/
		Inventory Product	MODERNA COVID-19 mRNA	
	1	Inventory Status	Available	
000	/	No Consent for Data Collection Doses		/
		Extra Doses From Vial		/
ellen hall, 2021-03-02,	5:18 p.m.	Last Modified By	🖰 ellen hall, 2021-03-02, 6:18 p.m.	
)	V	fiew All		
ory Na VEI Status		Allocated Doses	Extra Doses From Vial	
0.5 ml Active	-	250	6	
0.5 ml · Active	1	200	5	ŀ
y History (3) 2:52 p.m. from Vial	Vaccine Issent Inventary > A Vaccine Event Inver 3 Items - Sonted by Date - Upd Date	WODERNA COMP-19 miRA-1273 0 ntory History datad a five seconds aga	5 m - Y100000, 2027 40-31 V Uber V Display Malas V New W	alue
2:31 p.m. 2:31 p.m. Name	1 2021-03-18, 2:52	PM Extra Doses From 1	Kal elen hall é	
	ellen hall, 2021-03-02, 4 ory Na VEI Status 15 mf Active 55 mf Active 0 y	cilen hall, 2021-03-02, 6:18 p.m. ory Na VEI Sentus 35 mt Active 55 mt Active 52 mt Active 22 mt Active 22 mt Active 22 mt Active 22 mt Active 23 mt	Data Collection Barta Collection Extra Doces From Val Extra Doces From Val ony Na. VB Sentus Allocated Doces 15 mt - 20 ory Na. VB Sentus Allocated Doces 15 mt - 20 Active 200 Vece Al 201 Vece Al 202 Vece Al 203 Vece Al 203 Vece Al 203 Vece Al 203 Vece Al 204 Vece Al 205 Vece Al 206 Vece Al 207 Vece Al 208 Vece Al 209 Vece Al 200 Vece Al 201 Vece Al 203 Vece Al 204 Vece Al Vece A	Data Collection Doses Extra Doses From Vial Collen hall, 2021/03-02, 6:18 p.m. Collen hall, 2021/03-02, 6:18 p.m. Val Collen hall, 2021/03-02, 6:18 p.m. orry Na VBI Status Alticated Doses Extra Doses From Vial 12 method 200 0 <

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 COVax_{ON} 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:

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

Target Role: Inventory Manager

- 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"

			1								
Vaccine N	Managem Client Search	Clients 🚿	Inventory 🗸	Shipment 🗸	Dashboards 🗸	Mass D	ataLoads 🗸 Providers 🗸	Jobs 🗸	* More	• /	
Inventory All Inven	ntory 👻 🖈	111.E.O.S. 184114	JIMAC JANG J	CTHE SWELL		SI (771	3 ort Shipment Incident	Report W	/astage	Return	
iterns - Sorted by Lo	ot Number - Filtered by All inventory - Up	odated a few s	econds ago			Q 00001		≉ - Ⅲ -	C /	C T	
			-		L						
Inventory						5	Accest Inc.	-t	- 11 T		
MODERN	IA COVID-19 mRNA-1273	0.5 ml - l	.K0004, 2021	-05-31		- In	Accept Inver	ntory Rec	all Inventor	<u>у</u> –	
roduct IODERNA COVID	Doses 0-19 mRNA-1273 854	Available									
Related D	Details	l Atalaine					Wastage Events (1)			•	
Inventory Name	MODERNA COVID-19 mRNA-		Туре	Vaccine			wastage Events (1)				
,	1273 0.5 ml - LK0004, 2021-05 31			racento		_	Lakeridge Health Oshawa Reason for W DE - Defec	- 03/29/202 tive Product	1-1		
Doses Available 🚺	854		Expiration Date	2021-05-31		1	Doses Wasted: 50 Date Wastag 2021-03-2	29			
Status	Available		Lot Number	LK0004		1	,	View All			
			Transfe	Doses							
* Transferring	To Authorized Organization										
Ringsto	on General Hospital						>	×			
* Total Numbe	er of Doses										
100											
							Next				
irther	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.

Target Role: Inventory Manager

Before transferring	J:			After transferrin	g 3 doses	:	
• Dose Information	1			✓ Dose Information			
Total Doses 0 10		Doses Returned 0		Total Doses 0 7		Doses Returned O	
Extra Doses from Vial		Total Doses Wasted 0		Extern Dance from Mint		Tatel David Worked	
Doses Administered 0		Doses Wasted due to 0		Extra Doses from viai		Total Doses Wasted	
Deser Panding 0		Excursions Doces Palocated		Doses Administered 0		Doses Wasted due to 0	
No Consent for Data		Doses Impacted by 0	<u> </u>	Doses Pending 0		Doses Relocated 3	1
Collection Doses		Shipment Incident		No Consent for Data Collection Doses		Doses Impacted by O Shipment Incident	

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"

7 items • So	rted by Invento	ory Name • Filter	red by All inventory - User A	uth Org VS Trans O	irg•Update	d a few secon	ds ago			2 Search this	s list	\$ • Ⅲ •	C'	6 7
	Inventory	Name 🕇			∨ Tr	ansferring To	o Org	∽ Shipment	3 Product	「rade N ∨	Lot Nu 🗸	Status	∨ Tot	\sim
1	COVID-19	Moderna Vac	cine Mod 0.3 ml - OH564	, 2022-05-31	Au	thOrg-PHU-	Lakeridge		Moderna	Vaccine	OH564	Pending for Transfer	60	•
2	COVID-19	Moderna Vac	cine Mod 0.3 ml - OH564	, 2022-05-31	Au	thOrg-PHU-	Lakeridge	SHIP-000009	Moderna	Vaccine	OH564	Pending for Transfer	1	•
		Inventory			00001 20	021 OF 12				Transfer	Doses Accept	Inventory Recall Invento	ry 👻	
	Droet	PFIZER-DIC	DIVIECH COVID-19 MR	Doros Available	00001, 20	21-05-12						-		
	PF12	ZER-BIONTECH C	OVID-19 mRNA PB	2,000										
	Re	elated De	tails							🔯 Wastage	Events (0)		-	
	Ins	ventory Name	PFIZER-BIONTECH COVID	0-19 mRNA PB	Туре		Vaccine			_			_	
	De	oses Available 🕚	2.000	12	Expira	tion Date	2021-05-12		- 7	Excursion	Events (0)		·	
	Sta	atus	Pending for Transfer		Lot No	umber	00001		12	Event Inv	entories (1)			
	Pro	oduct	PFIZER-BIONTECH COVIE	0-19 mRNA PB	Tempe (°C)	erature Reading			1	Over 80 (Born	in 1941 or earlier) at the Lindsay Central Exhi	biti	
	Sh	ipment	SHIP-000253		Adjust	ment Quantity			- X -	Vaccine Event In VEI Status:	v PFIZER-BIONT Active	ECH COVID-19 mRNA PB 0.3	ml	
	Re	ceived Doses 🚯	2,000		Adjust	ment Reason			1	Allocated Doses			_	
	Pa	irent Inventory	Toronto Dublic Health		Adjust	ment Notes	2		\rightarrow		v	lew All		
	Or	rganization	Toronto Public Health		Actua	nojusumeni. Den	<u></u>			Files (0)				
			e Please click	Next to accept thi	s inventory.	A	ccept In	ventory			Next	nts		

Target Role: Inventory Manager

Before A	cceptance	_		After Ac	cceptance			
Vaccine Manag	gem Client Search Clients ∨ Inventory ∨	Shipment 🗸 Dasi	nboards 🗸 Institutions 🗸		ECH COVID-19 mRNA 0.3 ml - GL567	8. 202	1-03-31	
Product	ECH COVID-19 mRNA PB 0.3 ml - 0001, 20 Doses Available	021-02-27		Product PFIZER-BIONTECH COVI	Doses Available D-19 mRNA 100	,		
PFIZER-BIONTECH COVI	D-19 mRNA PB 100							
Related Detail	9 PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 🖉	Туре	Vaccine	Inventory Name	PFIZER-BIONTECH COVID-19 mRNA 0.3 ml - GL5678, 2021-03-31		Туре	Vaccine
Doses Available 🚯	0001, 2021-02-27	Expiration Date	2021-02-27	Doses Available 🚯	100		Expiration Date	2021-03-31
Status	Pending for Transfer	Lot Number	0001	Status	Available		Lot Number	GL5678
Product	D-19 mPNA PB	Temperature Reading	(°C)	Product	PFIZER-BIONTECH COVID-19 mRNA		Temperature Reading (°C)	-80
Shipment	SUID-000121	Adjustment Quantity	0	Shipment	SHIP-000089		Adjustment Quantity 🕕	
Received Doses	100	Adjustment Reason	-	Received Doses 🕔			Adjustment Reason	
Darent Inventory	DELIZED BIONITECH COMP 10 mPNA PB 0.2 ml	Adjustment Notes		Parent Inventory	Pfizer Vaccine 0.3 ml - GL5678, 2021-03-31		Adjustment Notes	
Parent anywrithity	0001, 2021-02-27	August Henri Notes		Authorized Organization	Toronto University Health Network		Actual Adjustment Date	
Authorized Organization	AuthOrg-PHU-Lakeridge	Actual Adjustment Da	te	× Location				
				• Location				

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.

 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"

Storage Location	Search Storage Locations	Q
Doses Relocated	+ 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

Target Role: Inventory Manager

- 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)

information				
Storage Location • Name	LHO - Fridge 1	Storage Type	Refrigerator	•
Authorized Organization	AuthOrg-PHU-Lakeridge	Storage Capacity	2,000	
Temperature	-60			_
			Cancel	Save & New St
	nformation Storage Location *Name Authorized Organization Temperature	nformation Storage Location LHO - Fridge 1 *Name Authorized Organization AuthOrg PHU-Lakeridge × Temperature -60	nformation Storage Location *Name Authorized Organization Temperature -60	nformation Storage Location Name LHO - Fridge 1 Storage Type Refrigerator Authorized Organization Temperature -60 Cancel

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

•••												
Client Search	Clients 🗸 Inventory	Shipment 🦴	 Dashboards 	√ Mass D	DataLoads 🗸 Providers 🗸 .	lobs	✓ Vaccination Events ✓ Loca	tions 、	/ * Pr	oducts 🗸	×	
Inventory Available Inventory I item · Sorted by Inventory Name · Filtered by All inventory - S	5tatus, My Organization • Updat	ed 2 minutes ago	S) (- / // 2	5.116 (/ N	Second State (1777)	//	Report Shipment	nt 3 \$	Report	t Wastage	Re	turn
Inventory Name 1 🗸 🗸	Authorized Organiz 🗸	Shipment 🗸 🗸	Lot 🗸 Stat	tus 🗸 Pro	duct Trade Name	~ s	torage Location	∨ Do	s ∨	D ~ [) v	
1 PFIZER-BIONTECH COVID-19 mRN	Toronto Public Health	SHIP-000253	00001 Avai	ilable PFI	ZER-BIONTECH COVID-19 mRN	N	letro Toronto Convention Centre Fr	2,0	00	D 0		•

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#

Target Role: Inventory Manager

IN Marke	The Free to (0)		IRNA 0.3 ml - 0001, 202	1-02-27			Trans	XDose
VVasta	ge Events (0)		Doses / 400	New Was	tage Event			
-		New	Internation					
astage Event	UHN - Pfizer Wastage - 02.25	* Reason for	*Wastage Event	UHN - Pfizer Vaccine Wastage	*Reason for	DE - Defective Product	5	
ne	PEIZER-BIONTECH COVID-19 mRN	× vvastage	Name *Vaccine	PEIZER-BIONTECH COVID-19 mRN X	Wastage		5	
select an inver	4a hich is in 'Available' status	Date Wastage Occurred	DIVID		Date Wastage Occurred	2021-02-25)
ion			Description		Docor Warted		5	
	Q We hit a spag	Spses Wasted	COVID	1	Doses Wasted	19		······
	Ø we nit a snag.	tire vaccine in-	lealth		Entire vaccine in- ventory wasted			
	Review the following fields	ntory wasted						

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 COVax_{ON} 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.

😢 Wastage Events (1)		Ţ
Broken Viles Lakeridge 1.2.2021 Doses Wasted: 0		
	View All	Edit

- 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.

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 COVax_{ON}.

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".

* Wastage Event Name	UHN - Pfizer Wastage - 02.25	" Reason for Wastage	
* Vaccine Please select an invent	PFIZER-BIONTECH COVID-19 mRN tory which is in 'Available' status	X Date Wastage Occurred	
Description			
	Ø We hit a snag.	× Poses Wasted	
	Review the following fields • <u>Vaccine</u>	itire vaccine in- ntory wasted	
	Cancel	Save & New Save	

Target Role: Inventory Manager Vaccine Managem. How: 2 All Inventory 1. Go to the "Inventory" tab 8 - E - C / 48 2. Select "All Inventory" from dropdown 3 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. A Excursion Events (0) 4. From the inventory's page, select the dropdown New next to "Excursion Events" and select "New". Files (0) 5. Fill in the details of the New Excursion Event **Excursion Event:** 5 Storage Location: Use search Information bar to indicate which storage Excursion ID Entire vaccine inentory wasted location experienced the excursion event Storage Location UHN- Fridge 1 × 0 ue to Excursion Vaccine*: Will be auto • Vaccine PFIZER-BIONTECH COVID-19 mF X Detected During populated based on the Annual Inspection 5 inventory record selected Excursion Date 2021-02-25 曲 Date/Time earlier 2021-02-26 🝵 12:00 PM 0 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 List of Items in the Event Description • rage unit? to choose the date of the excursion 5 5 Excursion Start Date/Time*: Time when . Excursion Start Temperature the temperature went out of range Date/Time 2021-02-25 12:00 PM 0 苗 • Excursion End Date/Time*: Time when the temperature was set back in range Excursion End Malfunction - Equipment v 2021-02-26 12:00 PM 0 苘 Time Duration of Excursion (hours): Time • elapsed between start time of excursion Recommended --None-24.000 (Resolution) and end time Excursion (In Excursion Type: Select "Temperature" . -10 **Cause*:** Use the drop-down options to • Reading (*C indicate the cause of the excursion Bag all vaccine an. **Recommended Disposition (Resolution):** . Select viable or unusable from the drop Advise premises t. down. Do not fill in until after the Public health unit.. inspection Actions Taken: Select actions from the available category and use the arrows to move the applicable actions . to "Chosen" category

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

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.

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.

Temperature	-10		Available Cristen
Reading (°C)			Bag all vaccine an Determine vaccin Advise premises t
		5	Any problems with
Max Temp During Excursion	-10.00		storage unit?
Min Temp During Excursion			Datalogger Recording Sent for Assessment
		5	Monitor Type
Last Logged	-20.00		Avallable Chosen
			Continuous Chart Continuous Monit Continuous Monit
		5	Comments/Other
Temp Last Logged Date/Time	2021-02-25 🛗	12:00 PM 🔇	Information
Number of Times Prod. was Exposed			* Reported By
Duration of Prod- uct Exposure			Contact Phone Number
		Cancel	Save & New Save



苗

0

Cause

* Excursion Start Date/Time

Complete this field.

* Excursion End Date/Time

Target Role: Inventory Manager

8. After/while creating the excursion event in COVax _{ON} , conta PHU to inform them of the excursion. The PHU will perform an	act the	Suspended for Vaccines 🔹
inspection of the incident. While the inspection occurs, the d remain in "quarantine"	oses 9	aNone
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	9	Available
editing the excursion event record	Excursion Event	ts (1)
a) Since you are unable to edit an excursion record	EXC-000005	9b 🔽 View All
"Available" status, you must update the inventory status to "Available" before editing the excursion	🕒 Files (0)	Delete
record.		
 If all inventory was impacted by excursion: check indicate total number of doses wasted (these dose inventory available). See, O Doses Available on inventory available). See, O Doses Available on inventory available. If a portion of inventory was wasted, leave check I The doses indicated will also decrement from the If the entire inventory Lot# was unaffected from the 	"Entire vace s will autor entory reco box blank au total available e excursior	cine inventory wasted" check box and matically decrement from the total ord with the status changing to nd only fill in the # of doses wasted fie ble. n event, input "O doses Wasted Due to
Excursion".	Doroc Wastad	1
Doses Available 0	Doses wasted	1
Status Complete Excur	sions	9,144
Doses	Relocated	600
Dose: Incide	Impacted by Shipme ent	ent O
10. Indicate the " Recommended Disposition" as "Viable" or		

"Unusable" depending on if the entire inventory was impacted by the excursion or not



d.

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.

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).

	Vaccine Managem Client Search Clients 🗸 Inventory	Shipment V Dashboards V Mass DataLoads V Providers V Jobs V Vaccination Events V Locations V * Products V X	N
2 ite	Inventory All Inventory V	Report Shipment Incident Report Wastage Ret Q 2021-05-12 Image: A model Image: A model Image: A model	turn
	Inventory Name	A gred Organization v Shipment v Lot Nu * Status v Product Trad v Storage Location v	
1	PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001, 2021-05-12	omo Public Health SHIP-000253 00001 Availa PFIZER-BION Metro Toronto Convention Centre 💌	
		•	

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 COVax_{ON}, and add the "Adjustment Reason", "Adjustment Notes" and "Actual Adjustment Date".

8. Select "Save"

Edit	PFIZER-BIONTECH COVID-19	mRNA PB 0.3 ml - 0	0001, 2021-05-12		
 Inventory Name 	PFIZER-BIONTECH COVID-19 mRNA PB	Type V	accine		
Doses Available 🕚	2,000	* Expiration Date	2021-05-12	ä	
Status	Available •	*Lot Number	00001		
* Product	PFIZER-BIONTECH COVID-19 ×	Temperature Reading (*C)		ß	
* Shipment	SHIP-000253 ×	Adjustment Quantity	10	Y	
Received Doses	2,000	Adjustment Reason	QH - Quantity Adjustment	•	
Parent Inventory	Search Inventory Q	Adjustment Notes	Manual Count		
Authorized Organiza- *tion	Toronto Public Health ×	Actual Adjustment Date	2021-03-29		
Location					
Storage Location	Metro Toronto Convention Cen ×				
			Cancel Save & Ne	w Savo	
Dose Information	٦				
Total Doses 🚯	2,000		Doses Returned	0	
Extra Doses from	n Vial 7		Total Doses Wasted	0	
Doses Administer	ered O		Doses Wasted due to	0	
Doror Ponding	0		Excursions		
Doses Perioring	0		Doses Relocated		
No Consent for I Collection Doses	Data 3]	Doses Impacted by Shipment Incident	0	
Recall Informatio	n				
Recall Source	Health Canada	•	Recall Date	2021-03-28	i
Doses Recalled	0		Rescind Date	2021-03-29	苗
System Informati	ion				
Inventory Owner	r Rebecca Solomon		Last Modified By	Rebecca Solomon, 2021	-03-29, 12:56 PN
Created By	Rebecca Solomon, 202	1-03-29, 10:37			
	AM				
		Cancel Sa	ave & new Save		

Further Context

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 COVax_{oN}). Each location has a designated User (Super User or Inventory Manager) responsible for reflecting recalls within COVax_{ON}. The User will follow the below process to recall the vaccine within the COVax_{ON} 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.

Target Role: Inventory Manager

How:

- 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).
- On the inventory page go to the right-hand corner and select "Recall Inventory" button
- Recall Source: Select "Health Canada" Recall Date: Select the date that the Lot# was recalled.
- Select "Next" and "Finish" the inventory recall record will then save, once saved the following occurs:
 - 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.
 - 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".

Further Context

- 2 Transfer Doses Accept Inventory Recall Inventory Recall Inventory Manufact Jan 26, 2021 苗 Recall Inventory Inventory recalled successfully PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001 Doses Available Product PFIZER-BIONTECH COVID-19 mRNA PB 0 Related Details Inventory Name PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml - 00001, 2021-05-12 4a Doses Available 🔒 0 Recalled 4b Status ✓ Dose Information Total Doses 100 Doses Returned 0 Extra Doses from Via Total Doses Wasted 0 Doses Wasted due to Doses Administered 0 0 es Pending Doses Relocated No Consent for Data Col-lection Doses Doses Impacted by Ship- 0 ment Incident ✓ Recall Information Recall Source Health Canada Recall Date 2021-01-26 Doses Recalled Rescind Date 100
- 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).

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 COVax_{ON}). 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:

- Change the status of the Inventory record from "Recalled" to "Available"
- 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"

	DUSES Available	0		Inventory Name	PFIZER-BIONTECH COVID-19 m	RNA PB 0.3	
	Status	Recalled		Doses Available 🔕	2,000		
n Doses			ment incident				
call Informatio	n			mation			
Source	Health Canada		2 Recall Date	2021-03-02 Health Cana	da /	Recall Date	2021-03-02
Recalled	990		Rescind Date	0		Rescind Date	2021-03-05
Recalled	990		Rescind Date	0		Rescind Date	2021.03.05

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