COVAX_{ON} Functionality Changes – Latest Release (March 31ˢᵗ)

Please see the functionality changes that were made for this release summarized below. This is a high-level summary of the changes. Users are recommended to refer to the latest versions of the **role-specific job aids** that will be provided, which incorporate the latest functionalities and step-by-step instructions.

Please refer to the sections applicable to your role:

Section 1: Clinical Flow

Section 2: Inventory Management

Section 1: Clinical Flow
1. **Simplified Vaccination Flow introduced**
2. **Client Status bar has been updated to reflect "New, In-progress, Completed" stages**
3. **Client's age calculated from DoB and displayed on the client record**
4. **Users alerted when attempting to administer a second dose before the minimum interval**
5. **Duplicate client record report developed**
6. **"Inactive" clients are unable to be checked-in or receive a dose**
7. **Congregate Living institutions are available to select from client record**

1. Simplified Vaccination Flow introduced

- A new functionality has been developed to offer a more efficient clinical flow process containing the check-in, vaccination and check out steps in one screen. This is to accommodate the scenario whereby one User is performing all the clinical flow steps, such as in the case of historical data entry.
- This flow should not be used in settings whereby different Users are performing each stage of the client's vaccination (check in, vaccine administration, and check out). The simplified flow can be accessed by Site Super User and Vaccinator profiles.
- A new job aid has been developed to outline the full clinical flow leveraging this new functionality; **"Simplified Vaccination Flow Job Aid"**. This job aid has been made available to the Site Leads for dissemination to all Users.

2. Client Status bar has been updated to reflect "New, In Progress, Completed" stages

The client header has been updated to reflect 3 distinct stages: *New, In-Progress and Completed*. Regardless of if the client is in dose 1 or dose 2, the dose administration workflow reflects the corresponding stage the client is in. The stage represents the client's journey from arrival to having had all their required doses. The status is more detailed and represents the dose administration of the client. Incorporating "stages" has solved for the scenario where a client is receiving a vaccine that only requires a single dose. In this case, the client will receive 1 dose and the stage will reflect "completed" after being checked out of dose 1. The product information at the top of the screen indicates whether the product is a single dose or multi-dose product.

Stage: New (Client has not had any doses administered)

Stage: In-Progress (Client has had at least 1 dose)

| Person Account **Harry Potter** | | | | | | Launch Simplified Flow | Check-In | Administer Dose | ▼ |
| Age 48 Years 6 Month(s) | Client Status Dose 1 checked out | Product Name Pfizer | Product Type Double Dose | Total Valid Dose 1 | Total Other Doses 2 | | | | |

| ✓ | In Progress | Completed |

Stage: Completed (Client has received and been checked out of all doses in the series)

| Person Account **Harry Potter** | | | | | | Launch Simplified Flow | Check-In | Administer Dose | ▼ |
| Age 48 Years 6 Month(s) | Client Status Dose 2 checked out | Product Name Pfizer | Product Type Double Dose | Total Valid Dose 2 | Total Other Doses 2 | | | | |

| ✓ | ✓ | Completed |

Note:
- The client status functionality has not been changed and continues to be updated based on the clinical flow. The introduction of the stage is an added layer of information. Any client lists or reports that were previously including the client status continue to contain that information.
- Historical client records will not immediately reflect the appropriate stage. However, if any update is saved to the client record, it will trigger the record to update to the appropriate stage. For example, a client that has been checked out from dose 1 will not show any stage. However, after modifying anything on the record, such as checking them in for dose 2, the stage will automatically update to "In Progress". Also, the product name and product type from their first dose will not be reflected in the header until an update is made to the record.
- If a client has received dose 1 of a multi dose product and the client is then marked "inactive", the client will remain in the "In Progress" stage under Dose 1 Checked out status.
- If the dose admin record is cancelled, the status will be impacted, which as result will modify the Stage. For example:
  o If the client is reverted to "New" status, it will change the stage to "New"
  o If the client is reverted to "Dose 1 Checked Out" status, it will change the stage to "In Progress"

3. Client's age calculated from DoB and displayed on the client record

COVax$_{ON}$ now calculates the client's age based on the Date of Birth that has been input on the client record. Client age information will be displayed next to the birth date on the client record header.

| Person Account **Ryan Gold** | | | | | |
| Birthdate 1949-03-09 | Age 72 Years 0 Month(s) | Gender Female | Home Phone (416) 694-8464 | Email testmoh12@mailinator.com | Stage In Progress |

The client's age will also be visible from the client list view on the Vaccination Event page and the "Showing Clients for Vaccination Event" report.

Vaccination Events > TPH Metro Toronto Convention Center
Clients
8 items · Updated a minute ago

	Client Name	Health card number	Birthdate	Gender	Client Status	Age	
1	Harvey Dawson		2000-01-01	Male	Dose 2 administered	21 Years 2 Month(s)	▼
2	Bob Sanders	2111111112	1993-02-16	Male	Dose 1 checked out	28 Years 1 Month(s)	▼

Report: Clients with Dose Administration and Org Vaccine Inventory
Showing Clients for Vaccination Event

| Total Records 12 | Total Total Valid Dose 12 | Total Any Adverse Events After 1... 0 | | | | | | | | | |

Client Name ↑	Client Status ↑	Health card number	Person Account: Birthdate	Age	Gender	Status	Vaccination Event	Total Valid Dose	Any Adverse Events After Immunization?	Dose Administration: Dose Administration
Adam Smith (1)	Dose 2 checked out (1)	-	1989-03-08	32 Years 0 Month(s)	Male	Administered	Rogers Center Toronto March 17	1	☐	DA-414041

	Client Name ↑	Birthdate	Age	Vaccination Event	Health card number
1	Chip Disney	1967-03-07	54 Years 0 ...	Lakeridge PHU, Lakeridge Health Oshawa, Oshawa	
2	Harvey Specter	1965-02-01	56 Years 1 ...	Lakeridge PHU, Extendicare Oshawa, Oshawa	4115116117
3	Joey Tribbiani	1976-03-18	45 Years 0 ...	Lakeridge PHU, Lakeridge Health Oshawa, Oshawa	2345789167
4	Rachel Green	1999-03-04	22 Years 0 ...	Lakeridge Health - Alexis Lodge Retirement Residence - ...	3332221111
5	Rex Murphy	1946-02-27	75 Years 0 ...	Lakeridge PHU, Lakeridge Health Oshawa, Oshawa	4115116122
6	Ross Geller	1998-02-04	23 Years 1 ...	Lakeridge Health - Alexis Lodge Retirement Residence - ...	2333263255

4. Users alerted when attempting to administer a second dose before the minimum interval

Prior to administering a client's second dose, vaccine administrators are provided information on the client's first dose, including the number of days that have elapsed between doses. If vaccine administrators attempt to administer a client's second dose before the minimum required interval for the product, they will receive an alert. Vaccine administrators should read the alert but are not prevented from continuing with dose administration. Note: this alert only arises in the regular flow (not the simplified flow).

Minimum product intervals:
- Pfizer = at least 19 days from the previous dose
- Moderna = at least 21 days from the previous dose
- COVISHIELD = at least 28 days from the previous dose

5. Duplicate client record report developed

Two reports were developed to identify potential duplicate clients in COVax$_{ON}$ to assist Site Super Users in resolving duplicate client records. The reports will display the client characteristics and the duplicate record item name allowing the user to proceed to manage the duplicates and leverage the client merge functionality. Please see the **Edit Dose Admin & Merge Duplicate Clients** job aid for more details about resolving duplicates.

1. Go to the reports tab, select "All Folders" and select "Duplicate Management"
- Open the "Dedupe clients filtered by User AO" report to see a list of duplicate clients only at your Authorized Organization

- Open the "Dedupe client sorted by PHU/AO" report to see a list of duplicate clients grouped by PHU, including all AOs at that PHU

2. Select the "Duplicate Record Item Name" on the right column for the client
3. Select the "Duplicate Record Set" hyperlink from the Duplicate Record Item

4. Select the "Related" tab of the Duplicate Record Set. This will show both client records that are linked as duplicates. Right click on the Client Name hyperlinks to open them into a separate browser. Review both records to determine next steps and if a client merge should be performed.
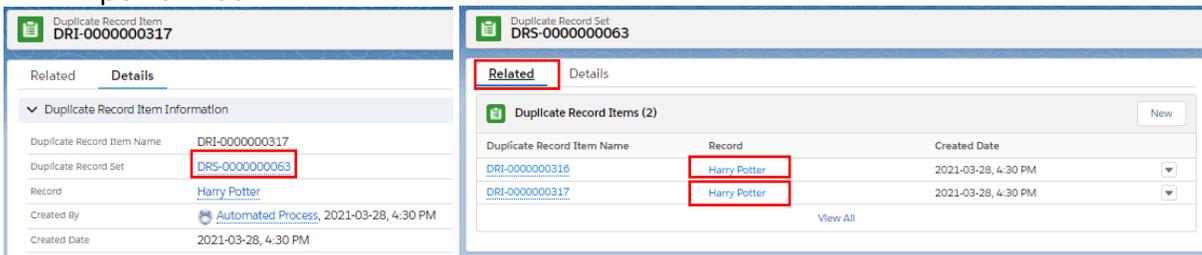
6. "Inactive" clients are unable to be checked-in or receive a dose

In both the standardized client flow and the simplified client flow, clients who are "inactive" are unable to be checked in or receive a vaccine. If a user attempts to check in or administer a dose to a client that is in the status "inactive" an error message will pop-up stating, *"The client should be 'Active' to proceed"*. The user must then remove the 'inactive' checkmark, and they will be able to proceed.
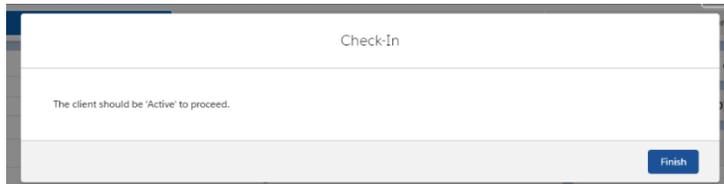
Note: inactive clients are filtered out of the client search from the Simplified Flow within the Vaccination Event record. If the client is not appearing when searching from the Simplified Flow, search the client from the "Client Search" tab and uncheck the "Inactive" checkbox to allow them to be searchable and proceed through the flow. For example, if the client moved out of province after having had their first dose and then returned and requires their second dose.

7. Congregate Living institutions are available to select from client record

Congregate Living facilities have been established in COVax as "Institutions" and are available on the client record to search and select from the "Institution" field.

The below table summarizes the types of Congregate Living Institutions:

Congregate Living Institution Types
MMAH funded Supportive Housing
Developmental services / Intervenor
Emergency Homeless Shelters
Mental Health and Addictions Supportive Housing
Homes for Special Care
Adult Correctional Facilities
VAW and AHT Shelters
Children's Residential Facilities
Youth Justice Facilities
Indigenous Health and Wellness Strategy Residences
Bail Beds & Indigenous Bail Beds

Section 2: Inventory Management
1. **Temperature label on Shipment record has been updated**
2. **Users able to select multiple reasons for damaged doses from shipments**
3. **New fields on Shipment record have become mandatory**
4. **Event Inventory related list view updated**
5. **Informational tooltips added to the fields on the inventory record**
6. **Pfizer product naming convention has been updated**
7. **New Janssen product available**

1. Temperature label on Shipment record has been updated

The Temperature field label on the shipment record has been updated to "Temperature Reading (°C)"

2. Users able to select multiple reasons for damaged doses from shipments

From the Shipment record, users can now select more than one reason for damage. This would be used in scenarios when there are multiple reasons for damage (i.e. if some doses were expired and some doses had a cold chain incident). Users can use the arrows to toggle items between the "Available" and "Chosen" columns, and more than 2 items can be selected.

3. New fields on the Shipment record have become mandatory

The following fields on the shipment record are required for the user to successfully save the record. An asterisk has been added to indicate to the user that the below fields are mandatory*. If the user tries to save the record with any of the below information missing, COVax$_{ON}$ will return an error (see below)

- Authorized Organization*
- Product*
- Quantity Received*
- Total Shipped Quantity*

4. Event Inventory related list view updated

The Vaccine Event inventory "Status" field name was changed to "VEI Status". In addition, the VEI Status of the Vaccination Event Inventory record (Active or Inactive) will be visible when users select "View All" Vaccination Event Inventories from the Authorized Organization inventory record.

It is important to keep in mind that if a Vaccine Event Inventory should not be made available for selection from the VE, the Inventory Manager/Super User can change the status of the Vaccine Event Inventory to "Inactive". Any Vaccine Event Inventory in status "Inactive" cannot be selected for administration by the Vaccinators. Also, if the Vaccine Event Inventory is from an AO inventory that is not in status "Available", it can also not be selected for administration.

5. Informational tooltips added to the fields on the inventory record

Within the inventory record, certain fields now have tooltip pop-ups added so users can better understand the calculations and definitions of each field:

Received doses	Doses Available	Adjustment Quantity
Received doses from shipment or from transfer Received Doses ⓘ	Calculation: Total Doses - (Administered Doses + Doses Pending + No Consent for Data Collection Doses + Total Wasted Doses + Doses Wasted due to Excursion + Doses Recalled) Doses Available ⓘ 10	Only to be used when received doses are entered incorrectly and to update Total doses to reflect physical quantity on hand. Doses should be entered cumulatively (e.g. if previous value=4, and current value =2, Adj qty should be=6). Users should enter Adjustment Reason and Adjustment Notes if the quantity is entered. Adjustment Quantity ⓘ
No Consent for Data Collection Doses	Extra Doses from Vial	
Doses should be entered cumulatively. (e.g if original value for no consent for data doses=2, next day's value is 3, therefore 5 should be entered on the field) No Consent for Data Collection Doses ⓘ	Doses should be entered cumulatively. (e.g if original value for extra doses=3, next day's value is 4, therefore 7 should be entered on the field) Extra Doses from Vial ⓘ	

6. Pfizer product naming convention has been updated

The Pfizer Vaccine product name has been altered to follow the below naming convention and the route of administration was updated to "Intramuscular: IM". The historical records have been updated based on this naming convention.

- Product name: PFIZER-BIONTECH COVID-19 mRNA PB