Target Role: Vaccine Administrator & Site Super User

Role Description:	Legend
Solo clinician who is responsible for client creation, checking in clients, administering doses and checking out clients.	Pencil Icon
Permission Level: COVax Vaccinator & COVax Site Super User	data fields
 Access Vaccination Event Access Client Search & Clients Edit-Access for Client Record Administer Dose Capability Simplified Vaccination Flow button For Vaccinators: View Dashboards and Linked Reports For Site Super Users: Read and Export Summary Client and Dose Administration Report, Details Client and Dose Administration Report & Vaccine Inventory Report, View Dashboards and Linked Reports 	 Red Asterisks Indicates a required field All COVID public health measures must be followed in alignment
Your profile has a defined access level and is associated with an Authorized Organization, which means you can perform the above activities within COVaxoN on behalf of that Authorized Organization (AO). For further details on your profile, refer to the "Login, Logout, and User Settings" job aid.	This document provides training on how to use the COVax _{ON} system for the vaccine management process. Within the clinical package that each site received, there are additional forms and documentation that you will need to use alongside the COVax _{ON} system.

Functionalities Covered in this Job Aid:

This job aid is specific to scenarios where one user is performing the full clinical flow (such as historical data entry, or as part of vaccinations taking place at pharmacies and primary care physician offices).

Simplified Vaccination Flow Activities:

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

M	ODULE 1 – Checking	g in the Client	
Se	ction	Description	Link(s)
1.	Search for or Create a Client Record	 A. Search client using their HCN, if record is not found, begin creating client record B. If client does not have a HCN, search client using alternative parameters. If record is not found, begin creating client record 	<u>Search for or Create</u> <u>Client Record</u>
2.	Enter Additional Details on Client Record	Enter in client contact information and sociodemographic details of the client	Enter Additional Details on Client Record
3.	Check-in the Client	Proceed to check the client in by documenting their COVID- 19 Assessment, recording consent for data collection and reason for immunization.	<u>Check-in the Client</u>
M	ODULE 2 – Adminis	tering the Vaccine	
Se	ction	Description	Link(s)
4.	Select the Vaccine Type	Vaccinator selects which vaccine will be administered to the client for either Dose 1 or Dose 2.	<u>Select the Vaccine</u> Type
5.	Conduct Pre- screening Assessment	Begin the Pre-screening assessment and determine whether the client is safe to receive the vaccine.	Conduct Pre- screening Assessment
6.	Record Consent & Enter Dose Admin Details	Obtain & record client consent for service and specific dosage information in the Administer Dose screen.	Record Consent & Enter Dose Admin Details
M	ODULE 3 – Client C	heckout	
Se	ction	Description	Link(s)

Target Role: Vaccine Administrator & Site Super User

7.	Client Check Out	Check out the client and direct them to monitor for AEFI. Once the 15-minutes has elapsed for AEFI monitoring, Users can locate the client's record in COVaxoN and document AFEI on dose admin record if it occurred	Client Check Out

Module 1 : Checking in the Client

1. Search for or Create a Client Record

Description: Upon client arrival, users will ask the client for their Health Card Number (or other identification information if they do not have an HCN) and will proceed to open the appropriate Vaccination Event Record and launch the Simplified Flow functionality. The process below will be followed for either Dose 1 or Dose 2 clients.

2

How:

- 1. On the appropriate Vaccination Event record, select **"Simplified Vaccination Flow"**
- If the client has a health card, enter client HCN and select "Next". If the client does not have a health card, leave the field blank and select "Next"
- If searched by HCN and the client record is found, select the Client Name hyperlink to open the client record. Proceed below to <u>step 2: Enter Additional</u> <u>Details on Client Record</u>
- If the HCN search returns no results or no HCN was searched, populate other client data on the second pop-up window for searching (at minimum, the client's First Name, Las Name and **ONE OF** Date of Birth or Postal Code must be searched by.)
- If a client is found, select their name hyperlink to open their profile and proceed to step 2: Enter Additional Details on Client Record. If a client is still not found, toggle the bar to "Active" to enable client creation (through RPDB search or manual creation) and select "Next".
- 6. If an HCN was entered, it will search the Registered Person Database. A client creation screen containing their information will populate. If an HCN was not entered, the client creation screen will be empty, and the client details should be populated:
 - Required Fields: Last Name (First Name is not required, but should be entered), Gender, Date of Birth
 - Highly Encouraged Fields: Health card number, Public Health Unit

			Simp	plified Vacci	natio	n F	low			
Enter a health Health Card Nu	card numbe mber	r, if no health car	d numb	er is provided ple	ase clic	k the	e next button to sea	rch witi	h other para	meters.
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6	Ī			Simplified \	'accin	atio	n Flow		Previous	Next
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No client record fo	und, click the	e Next button to	create a	new client record	i.					^
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Weasley										
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9090909881										

Target Role: Vaccine Administrator & Site Super User

- 7. Review the information and make any required updates client and select **"Next"**.
- 8. Click the link shown in the pop-up window to open the client record in another browser tab
- 9 Simplified Vaccination Flow
 Client record created successfully Click on the link to get to the record and update the rest of the information.
 Fields

9. Click "Finish"

Note: If you select **"Finish"** before opening the hyperlink in step 6, you may access the client record using the Vaccination Event Tab. To do so, open the Vaccination Event record, scroll down and select "View All" under "Clients". You may then filter on the Clients list for the desired client record.

10. From the client record, populate other required information including sociodemographic information. More details can be found in **step 2: Enter Additional Details on Client Record**

Further Context

• If the client is in the status "Inactive" Users will not be able to find them from the simplified flow. To modify this, Users must uncheck the "Inactive" box on the client's record to continue through the simplified flow.

2. Enter Additional Details on Client Record

Description: Once the client record has been found or created, begin populating the record with client contact details and sociodemographic information. Once complete, select "Launch Simplified Flow" to proceed to check in, administer and check out the client

How:

- 1. Enter the "Reason for Immunization" on the client's record
- 2. From the Client's record, enter in contact information for the client:
 - Email/Phone Number(s)
 - Preferred Method of Communication



Reason for

Immuniza

Refer to the "i" icon next to the email and research communication consent fields to read the relevant disclaimers to the client. If the client provides a phone number/email address, the relevant consent boxes will be auto populated.

- 3. If provided, enter the client's address in the "Address Information" field. The address should be entered into the "Search Address" bar, which will identify the address and auto-populate the remaining fields.
- 4. Ensure the appropriate Vaccination Event is recorded on the client's record.
- 5. Enter Sociodemographic information on the client's record
 - a) On the bottom right side of the client record, select "New" from Sociodemographic Data
 - b) Read the disclaimer to the client, obtain consent for information collection, and populate following fields (Note: the information is not mandatory but encouraged. If the client does not consent, skip this step and proceed with check-in process):
- **Consent:** Client must provide consent for the user to record sociodemographic details about them (if no consent is received, do not continue to populate t he fields below).
- **Race/Ethnicity/Childhood language:** Select from the available options and use the right arrow to "Choose" the option or use the free text field if needed. The left arrow can be used to move items out of the "Chosen" box.



Age Priority Population

Target Role: Vaccine Administrator & Site Super User

- Total Household Income: Indicate value from dropdown.
- Household Size: Indicate the number of people in the client's household.
- Official Language: Indicate which of the Canadian official languages the client is most comfortable speaking. c) Select "Save" to save the sociodemographic information on the client record.

Save the client record with the changes.

3. Check-in the Client

Description: Proceed with checking in the client for either their Dose 1 or Dose 2. Now that the user has opened the client record, they may access the "Simplified Vaccination Flow" directly from the client record

How:

- From the client record, navigate to the right-hand corner of the screen and select "Launch Simplified Flow".
- 2. Begin checking in the client using the Simplified Flow.

3. Read disclosure statement out loud to the client. You may also find this disclosure statement in the clinical package to print out and post on-site if needed.

4. Ensure the COVID-19 assessment has been completed and check the associated box. This is a mandatory checkbox.

5. Obtain client consent for data collection. If the client does not consent, an offline process should be followed to collect client information. See the "Further Context" section below.
6. Select a Reason for Immunization from the dropdown. This is a mandatory field.
7. Select "Next".

New In Progress Completed ath card monor Duplicate Key Image: Second Seco	rs 0 Month(s)	Client Status New	Product Name	Product Type	Total Valid Dose 0	Total Other 0	r Doses	Check-In	Administer Dose	
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The add the a	t Name Carri	a Linderwood		Dueliasta Key			We found pr	notential du	unlicates of this Clie	ant
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Further Context

- Clients can also be searched from the "Clients" section of the Vaccination Event (by selecting "View All" and applying any filters or sorting). This is a useful consolidated view of all clients at the VE.
- "COVID-19 Assessment Completed" this checkbox verifies that the client has completed their COVID-19 pre-screening before entering the location. Users should verbally ask the client if this assessment has been completed. This is a mandatory checkbox.
- "Consent for Data Capture" this checkbox indicates if the client is comfortable with their personal data being entered into the COVax_{ON} system. This is not a mandatory checkbox. However, if the client does not consent, no further data should be entered in the COVax_{ON} system and the offline paper process should be followed for vaccination (refer to the Offline Process in Module 1 section 5 of the "End to End Job Aid" for more details on this).

Target Role: Vaccine Administrator & Site Super User

- The information entered on this check-in screen (checkboxes and "Reason for Immunization" drop down) will be automatically populated on the client record page. The information can also be modified from the client's record page if needed.
- If the client is in the status "Inactive" Users will not be able to check them in. To modify this, Users must uncheck the "Inactive" box on the client's record to continue with the check in process.

Module 2 : Administer the Vaccination

4. Select the Vaccine Type

Description: Vaccinator selects which vaccine will be administered to the client for either Dose 1 or Dose 2 (Pfizer/Moderna/COVISHIELD).

How:

- 1. Select the proper Vaccine to administer to the client (for either Dose 1 or Dose 2).
- The vaccine inventory that is available at the client's Vaccination Event will be available for selection from this drop-down. If you do not see values here, this indicates that there is no inventory linked to the client's VE. If you leave the drop-down selection as "Please Select" the system will return an error.
- If you are administering the second dose, you will receive a pop-up with the Dose 1 information. Review this record to ensure the client should proceed with dose 2.
- If you are administering Dose 2, the Vaccine selection must be the same product as the clients first dose. If it is not, an error will occur, and you must select "**Previous**" to re-enter the vaccine type.
- 2. After selecting the vaccine for either Dose 1 or Dose 2 select **"Next".**

	Launch Simplified Flow	0
Select Vaccine		
* Vaccine COVISHIELD COVID-19 No	n-rep VV 0.5 ml - 0004, 2021-03-31	•
		Previous Next
		Date:
Dose 2	Administer Dase	Cate.
Dose 1 Administered : Vaccine Administered : Vaccine Administered : Administered :	Administer Dose Client to receive Dose 1 of 2 constitution conta 31 Non-rep VV // Frie guode	Cox.
Dose 1 Administered :: Vectors Administered :: Apps Sharebased :: Apps Sharebased :: Press	Administer Dose Client to receive Dose : 2 of 2 022-05-19, 2 14 p.m. CONTINUED COVID -29 Non-ng-VV I/ forai guides	Cox.

Further Context

- The naming convention for each vaccine/diluent is always consistent and reflective of the information on the physical labels to ensure the correct inventory can be selected:
 - o Example: Pfizer: PFIZER-BIONTECH COVID-19 mRNA PB 0.3 ml EK4175, 2021-03-31
 - Example: Moderna: MODERNA COVID-19 mRNA 0.5 ml RP0000, 2021-05-29
 - Example: COVISHIELD: COVISHIELD COVID-19 Non-rep VV 0.5 ml 0001, 2021-03-31
- There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, client status and other client information. To view this report, go to the VE record you are interested in, scroll down to the "Report Links" section, and select the "Showing Clients for Vaccination Event" report.
- Vaccinators must ensure that the appropriate number of days have elapsed between doses. The minimum product intervals for each vaccine type are:
 - 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

Target Role: Vaccine Administrator & Site Super User

5. Conduct Pre-Screening Assessment

Description: The Vaccine Administrator can now begin the Pre-Screening Assessment for the vaccine selected. Once the assessment is finished, the Vaccine Administrator must determine whether the client is safe to receive the vaccine.

How:

- Perform the appropriate **Pre-Screening Assessment** for the vaccine. If the client responds "**Yes**" to any of the questions, ensure to check the appropriate box.
- Use the final checkbox "Pre-Screening Assessment Complete" to confirm completion in COVax_{ON}. This is a mandatory checkbox for to be recorded for both Pfizer, Moderna and COVISHIELD vaccines. The user may also input any clinical notes for the client (up to 100,000 characters).
- 3. Based on the Pre-Screening Assessment, the Vaccine Administrator must use their clinical knowledge to determine if the client should receive the vaccine.
 - a) If Yes (client may receive vaccine) Proceed to Step
 5: Record Consent and Fill in Dose Administration
 Details.
 - b) If No (Client cannot receive vaccine), exit the simplified flow, and then populate the "Reason Vaccination was not Administered" drop down on the client record. The client can then exit.

Dose : 1 of 2	
COVISHIELD COVID-19 Non-rep VV 0.5 ml Pre-Screening Assessment	
If the individual answers yes to any of the pre-screening questions, document details in the comments box below.	
Have you been sick in the past few days? Do you have symptoms of COVID-19 or have a fever today?	
Have you had a serious allergic reaction or a reaction within 4 hours to the COVID-19 vaccine before?	
Do you have allergies to polyethylene glycol, tromethamine (Moderna only) or polysorbate?	
Have you had a serious allergic reaction to a vaccine or medication given by injection (e.g., IV, IM), needing medical care?	
Have you received a vaccine in the past 14 days?	
Are you or could you be pregnant or breastfeeding?	
If pregnant, have you spoken with your treating health care provider about getting the vaccine?	
Do you have a weakened immune system or are you taking any medications that can weaken your immune system (e.g., chemotherapy)?	high dose steroids,
If yes, are you receiving stem cell therapy, CAR-T therapy, chemotherapy, immune checkpoint inhibitors, mor other targeted agents?	noclonal antibodies or
If on one of the therapies listed: Have you spoken with your treating health care provider about getting the v	accine?
Do you have an autoimmune condition?	
Do you have a bleeding disorder or are taking blood thinning?	
Have you ever felt faint or fainted after receiving a vaccine or medical procedure?	
Comments	
	1.
Pre-screening Assessment Completed	
	Previous

6. Record Consent and Fill in Dose Administration Details

Description: Obtain and record client consent for service and specific dosage information in the Administer Dose screen. Review the details of the dose for accuracy and complete the dose administration. Direct the client to wait for 15 minutes to monitor for adverse event following immunization (AEFI) for 15 minutes

How:

- Obtain verbal Consent for Service from the client and populate the checkbox. If provided, the client's Consent for Service will apply for both doses and appear automatically checked when the client returns for their second dose.
- If the client does not consent and chooses to exit, close the simplified flow screen & populate the "Reason Vaccine was not Administered" on the client record:
- **Dose 1**: "Practitioner recommends immunization, but patient did not consent"
- Dose 2: "Patient withdrew consent from series"
- Dose : 1 of 2 Vaccine Artministration Consent to receiving the vaccine, including all recommended doses in the serie Vaccine : COVISHIELD COVID-19 Non-rep VV 0.5 ml - 0004, 2021-03-31 * Route Intramuscular / intramusculain • Anatomical Site Left arm / bras gauche Data and Time Mar 19, 2021 首 2:16 PM 0 Vaccination Event : Lakeridge PHU, Lakeridge Health Oshawa, Oshawa cine Administered By John Dawdy, Medical Doctor, 59417 ×

Launch Simplified Flow

- 3. If client consents, confirm the accurate **Vaccine Name** (automatically populated based on selection from 1st screen) and search for diluent available in the system if diluent is required (for Pfizer Vaccine only).
- 4. **Route** will be pre-populated and only have 1 option available.

Target Role: Vaccine Administrator & Site Super User

- 5. Select Anatomical Site of Vaccination from the drop down.
- 6. Input **Date** and **Time** of vaccination (defaults to current date & time).
- 7. **Vaccination Event** will be prepopulated based on the Vaccination Event tied to the client's record.
- 8. Fill in the **"Vaccine Administered By"** field by searching for the provider who administered the vaccine to the client.
- 9. Select "Next".
- 10. Review the selections you made to ensure all the data entered is accurate and select "**Next**". Users should not exit this screen. However, if they do exit, the Dose Administration record will be created and users will have to use the "Check Out" button from the client record to complete the check out.
- 11. Pop-up will confirm that the system has successfully recorded the dose administration. Leave this window open and click 'Next' to **step 6: Client Check-out.**

Note: After administering a dose and the "Finish" button is selected, the inventory level in the $COVax_{ON}$ system will be automatically decremented.

Dose : 1 of 2 Please review the dose information entered, once "Next" button is selected changes can only be made directly in the newly created "Dose Administration" record. Dose Information Client : Chip Disney Prescreening Assessment Completed : Toe Prescreening Assessment Completed : Toe Disnet: Information Date : Information Completed : Toe Disnet: Information Date : Information Completed : Toe Disnet: Information Date : Information Date : Information Completed : Solution: Disnet: Toe Disnet: Information Date : Information Date : Information: Reference Home: Healthcare Worker Authorited Organization/Organized Bioteco : 59417 Vaccinde Completed : Disnet: Disnet: Disnet: Bioteco : Disnet: Bioteco : Disnet: Disn	
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Cilent : Chip Disney Pre-Scienting Assessment Completed : true Corsent to receiving Massessment Completed : true Corsent to receiving the vaccine, including all recommended doess in the series : true Distance D	ose Information
	lent: Chip Disney escreening Assessment Completed : true escreening Assessment Completed : true tothe : : course : : : course : : : course : : : course : : : : course : : : : course : : : : : : : : : : : : : : : : : : :
Previous	Previous

Launch Simplified Flow

Further Context

- When a user is populating the "Provider" field, if the vaccinator's name is not available as an option when searching within the "Vaccine Administered By" field, users can select "Other Clinician, Other Designation, xxx" as a generic placeholder. This will trigger a second field to become available, "Vaccine Administered By (Other)". The Vaccinators details should be entered here as: [First Name] [Last Name], [Designation OR Provider Role], [Professional License]. It is highly encouraged to reach out to your Site Lead who can submit a request to the ITS team for this provider to be created in the system to avoid manual entry.
- If Vaccine Administrators will be administering doses throughout multiple Vaccination Events within their Authorized Organization, the User will be able to do so with their current login credentials. If the User will be administering doses across two Authorized Organizations, they will require two separate COVaxoN user accounts and login details.
- If the vaccine being administered was Pfizer, the Vaccine Administration window would have an additional field for Users to select the diluent inventory from the system.

 Consent to receiving the vaccine, including all recommended doses in the series
Vaccine : PFIZER-BIONTECH COVID-19 mRNA 0.3 ml - BN1234, 2021-03-31
* Diluent Event Inventory

Module 3: Check-Out

7. Client Check Out

Description: Users can proceed to check the client out through the Simplified Flow. After check-out, the User must instruct the client to wait for 15 minutes to monitor for any potential Adverse Effects Following Immunization (AEFI). If AEFI occurs, the User can indicate this on the Dose Administration record.

Target Role: Vaccine Administrator & Site Super User

 A) Check-out (1. If the client would like to receipt, leaved otherwise, upatient" che 2. Select "Nex 3. A pop-up wirecorded the "Finish" to serecord. 	Client Using Simplifie provided an email add preceive an email cop e the checkbox check incheck the "Email re eckbox. t." Il appear confirming the client's check-out. S ave the Dose Adminis	ed Flow Iress and y of their ced. ceipt to he system has elect tration	1 excession contraction We have successfully records by unchecking the email receipt is pradient contraction 3 We have successfully records click here to view receipt	Launch Simpl Dose : 1 of d your Dose administration. lipt checkbox below, the client will not receive Launch Simpl Dose : 1 of red your check out.	an email copy of the receipt.	Roued Dose 2004	oten ratio
Once the Simpli (Alternatively, fo out). The status Person Account Carrie Unde Age 18 Years 0 Month(s)	fied Flow is complete, or the client's second of bar will indicate "Com rwood Client Status Dose 2 checked out	the client stations, their stations, their stations, their stations, their stations, their stations, the stations, the stations of the station	us will move fro us will move fro all doses in the s Product Type Double Dose	m "New" to "Dos m Dose 1 checke series have been Launch Simplified Flow Total Valid Dose 2	e 1 checked d out to Do administer Check-In Total Other Doses 0 Completed	l out". se 2 checked ed. Administer Dose	t T
 B) Documentin 1. If the client of the cl	ag Any AEFI & Checki experienced any AEFI, the client record, ope electing the hyperlink y on the client record, on. levant filters/sorting - lient's Dose Administr se Administration recon " checkbox	ng Out treat the client en the relevant (for example, I navigate to the for example, f for example, f ration record ar ord, check off t	t for the AEFI th Dose Administr DA-413576). e Vaccination Ev ilter by "Client N nd select the hy the "Any Advers <u>Dose Administrat</u> DA-0677 DA-0881 the location afte	at occurred. ation record on t vents tab and sel Name." perlink (for exam e Events After.	he right sid ect "View A ple Any Adve ter Immu	e of the clier	nt ose 6

edit the Dose Administration record.

Target Role: Vaccine Administrator & Site Super User

C) Printing Receipt and Scheduling the client's second dose

- 1. After the client has been checked out, open the client's PDF receipt from the client record.
- 2. Once the receipt PDF opens, select "Download" to open it in a separate tab
- 3. The receipt will open in a separate tab. Select the option to print the receipt. Retrieve the printed receipt and hand write the date and time for the client's second dose appointment.
- 4. Provide the client with receipt and relevant discharge information.

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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.