COVax$_{ON}$ Simplified Vaccination Event Flow

Your Profile: COVax Vaccinator, Site Super User

One user performing the full clinical flow including check-in, dose administration, and check out.

Simplified Flow Activities

Here are the core tasks you will perform daily. **Click the relevant link:**

#	Section	Description
1	Search for or create a client record	A. Search client using their HCN B. If client cannot be found using HCN, search for the client using alternative parameters. If their record is still not found, begin creating client record
2	Enter additional details on client record	Enter in additional details on the client record
3	Entering Client Alerts	Vaccinators, Site Staff and Site Super Users can enter an alert on a client's record to document any important details related to the client that would be helpful for when the client returns
4	Check-in the client	Proceed to check the client in by documenting their COVID-19 assessment, recording consent for data collection & research communications, and reason for immunization.
5	Select the vaccine type	Vaccinator selects which vaccine will be administered to the client for either Dose 1 or Dose 2.
6	Conduct pre-screening assessment	Begin the pre-screening assessment and determine whether it is safe for the client to receive the vaccine.
7	Record consent & enter dose admin details	Obtain & record client consent for service and specific dosage information.
8	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 COVax$_{ON}$ and document AEFI if needed.
9	Add Clinical Notes to the Client Record	Add clinical notes directly to the client record (if needed)
10	Appendix A: Offline Document Process	Description of offline document process that can be used when COVax$_{ON}$ is inaccessible or the client does not consent to data collection
11	Appendix B: Client Record Best Practices	Description of the mandatory and highly encouraged fields on the client record

Additional Information

- Refer to the "**User Profile Set Up**" job aid to learn more about your system access. Refer to the MOH Clinical Package on SharePoint for forms and process information that you might need in addition to this job aid.
- Refer to the "**Edit Dose Admin Records & Merge Duplicate** Clients" job aid for information on historical data entry, editing dose administration records (& re-printing/re-emailing receipts), or merging duplicate client records.
- Refer to the "**Check In**" job aid, "**Vaccine Admin**" job aid, and "**Check Out**" job aid when multiple people are performing these functions.

COVax$_{ON}$ Simplified Vaccination Event Flow

Disclaimer

Data Privacy: Users with access to COVax$_{ON}$ can see the demographic details and HCNs of other clients in the system when searching for a particular person. The information is presented this way to help ensure that users access the correct client record and to reduce the risk of either not locating a client's record or improperly creating duplicate client records. **As required by PHIPA and under the terms of the Acceptable Use Policy, system users are only permitted to access the information of individuals to whom they are providing care or for other purposes that are specifically authorized.** COVax$_{ON}$ records detailed audit transaction logs that inform the MOH of which client records were accessed by each user, and what actions they took in the system. Any concerns that are identified about improper access to the system will be investigated and appropriate actions taken.

COVID Public Health: All COVID public health measures must be followed in alignment with the tasks outlined in this job aid

Module 1: Checking in the Client

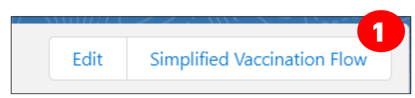
1. Search for or Create a Client Record

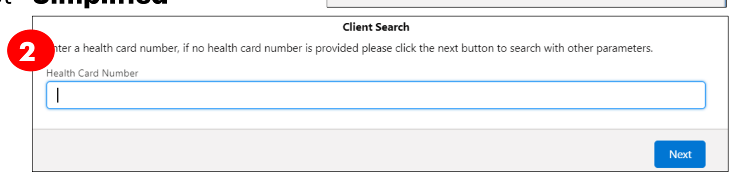
Description:

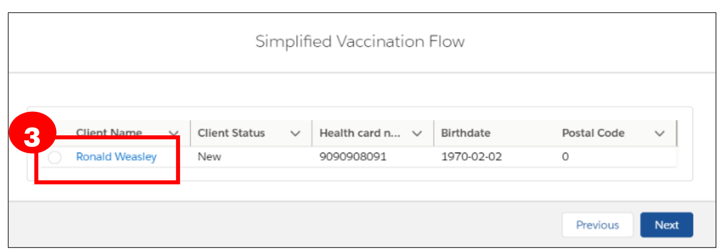
Upon client arrival, open the appropriate Vaccination Event Record and launch the Simplified Flow functionality. Ask the client for their Health Card Number (or other identification information if they do not have an HCN) to locate their record in COVax$_{ON}$. The process below will be followed for both Dose 1 and Dose 2 clients.

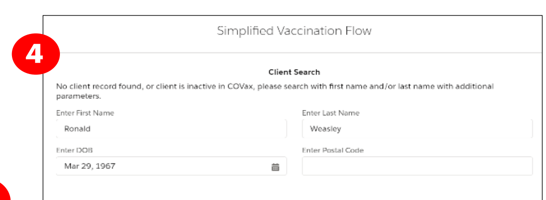
How:

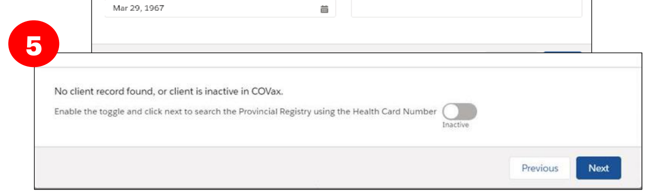
1. On the appropriate Vaccination Event record, select **"Simplified Vaccination Flow"**
2. If the client has a health card, enter their HCN and click **"Next"**. If the client does not have a health card, leave the field blank and click "**Next**"
3. If searched by HCN and the client record is found, select the Client Name hyperlink to open the client record. Proceed to Section 2: "**Enter additional details on client record**" below.
4. If the HCN search returns no results or the client did not have a HCN, populate other client data on the second pop-up window for searching (at minimum, the client's First Name, Last Name and **ONE OF** Date of Birth or Postal Code must be searched)
5. If a client is found, click on their name hyperlink to open their record, and proceed to Section 2: "**Enter additional details on client record**" below. If a client is still not found, toggle the bar to **"Active"** to enable client creation



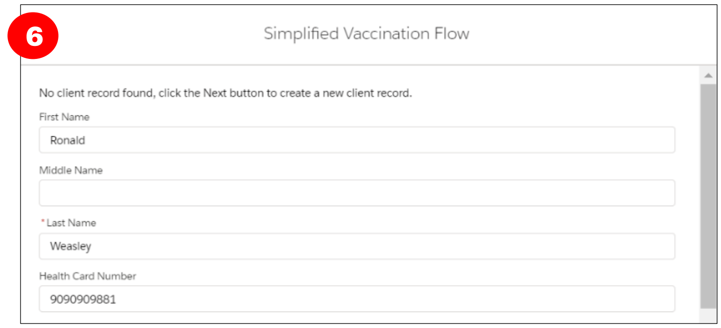




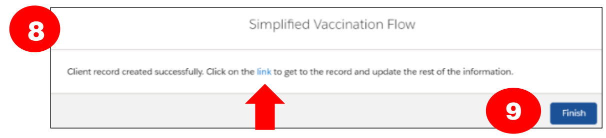




(through the Provincial Registry search or manual creation) and click **"Next".**



6. If an HCN was entered, it will search the Provincial Registry. 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 (see "Appendix B: Client Record Best Practices" for more information on the client record)
7. Review the information and make any required updates to the client details and click **"Next"**.
8. Click the link shown in the pop-up window to open the client record in another browser tab
9. Click **"Finish"**



Note: If you click **"Finish"** *before* opening the hyperlink in step 8, you may access the client record using the Vaccination Events Tab. To do so, open the Vaccination Event record, navigate to the "**Related**" tab and scroll down and click on "**View All**" under "**Clients**". You may then filter on the Clients list for the desired client record and select it.

Further Context

- If the client is in the status "**Inactive**" Users will not be able to find them through the simplified flow. To modify this, Users must locate the client's record within COVaxON (likely using the client search tab), then 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, populate the record with client contact details and sociodemographic information. During Dose 1 or Dose 2, users may also create an "Alert" on the client record. Refer to "**Appendix B: Client Record Best Practices**" below for further details on the client record best practices.

Client Record Information

1. Validate the client record information – Name, Gender, Date of Birth, Health Card Number and Vaccination Event. If the client does not have an HCN, request an "**Alternative ID**" to be provided (i.e. drivers' licence, passport, birth certificate, etc.).
2. Search and select the client's Primary Care Provider (if possible)
3. Select the "**Reason for Immunization**" from the dropdown options available (use the most accurate value - do not default to "**Other Priority Population**"). If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or "**Youth 12+**", the Institution field for that client will become mandatory. For all other Reason for Immunization values selected, the Institution field is optional. (See "Appendix B: **Client Record Best Practices**", for additional detail).
4. If the client is identified as Indigenous, select the relevant option using the drop-down list.
5. From the Client's record, enter in contact information for the client (such as email/phone number(s)).
6. Indicate the Preferred Method of Communication. If the client provides a phone number/email address, the relevant consent boxes will be populated.

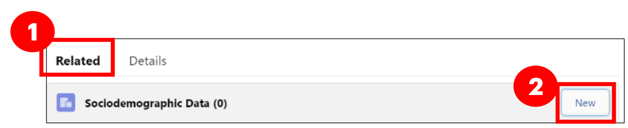
7. If provided, enter the client's address in the "**Address Information**" field. The address should be entered into the "**Search Address**" bar, which will identify the address and auto-populate the remaining fields once selected. Once the client's postal code is populated, the associated PHU will be auto populated. If the PHU is mapped incorrectly, manually modify the PHU field. If the postal code is deleted from the client record, the PHU remains on the record.

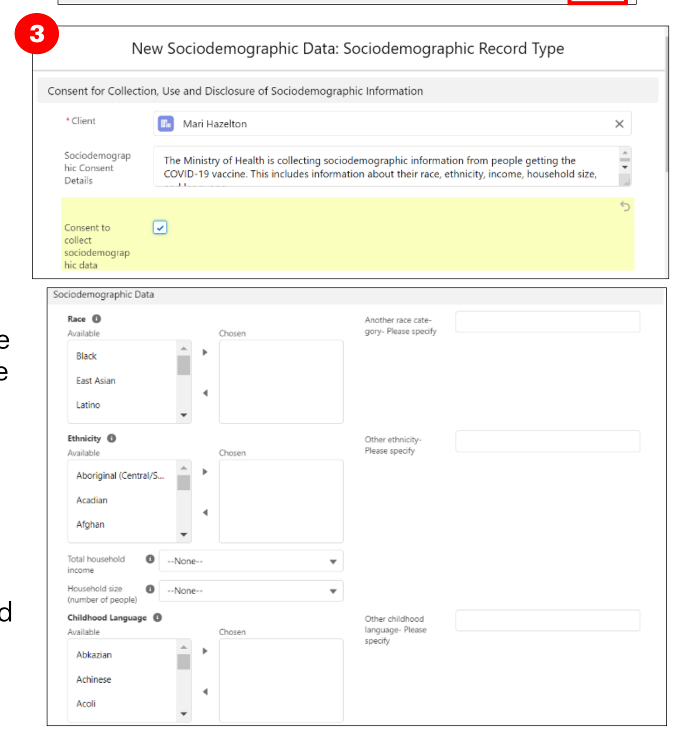
Sociodemographic Information

Enter Sociodemographic information on the client's record

1. From the desired client record, click on the "**Related**" tab
2. Under "**Sociodemographic Data**" and click "**New**"
3. Read the "**Sociodemographic Consent Details"** to the client. If consent is obtained, click on the "**Consent to collect sociodemographic data"** checkbox and populate following fields:

- **Client:** Auto-populated based on the client record selected
- **Consent:** Client must provide consent for the user to record sociodemographic details about them
- **Race/Ethnicity:** 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.
- **Total Household Income:** Indicate value from dropdown
- **Household Size:** Indicate the number of people in the client's household
- **Childhood Language:** Indicate the language the client first learned and still understand from the options listed or use the free text field if needed.

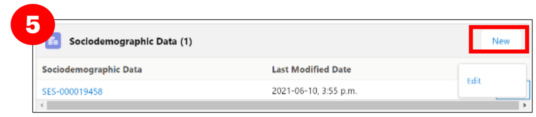




- **Official Language:** Indicate which of the Canadian official languages the client is most comfortable speaking

4. Click "**Save**" to save the information on the client record.

- Users can edit the Sociodemographic record by clicking the drop down and "**Edit**". Sociodemographic records cannot be deleted once created.

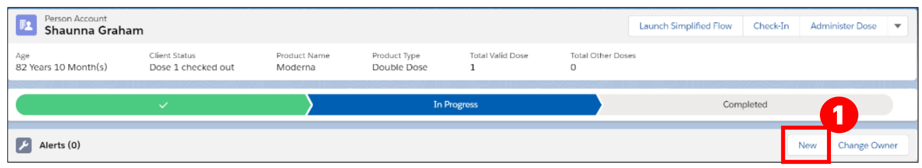


3. Entering Client Alerts

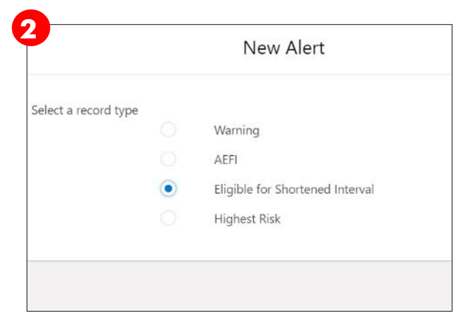
Description: Vaccinators, Site Staff and Site Super Users can enter an alert on a client's record to document any important details related to the client that would be helpful for when the client returns (i.e. additional comments, any AEFI details, Shortened Dose Intervals, etc.). This alert appears as a banner on the top of the client record.

How:

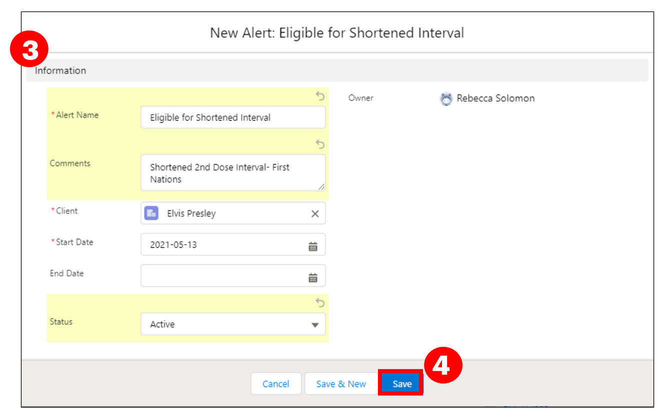
1. From the client's record, in the "**Alerts**" section, Click "**New**"



2. Select alert type being created:
   - "**Warning**" may be for a client who has a fear of needles
   - "**AEFI**" may be for any specific information related to an AEFI they experienced on their first dose
   - "**Eligible for Shortened Interval**" may be used for clients who meet the eligibility requirements for a shortened dose interval
   - "**Highest Risk**" may be for clients considered to have a highest risk health condition



3. Populate alert fields:
   - **Alert Name*:** Enter the Alert Type, followed by a description. (i.e. "Warning: Fear of Needles" or "Eligible for Shortened Interval"). See further context section below for eligibility.
   - **Comments:** Any additional comments about the situation. For Shortened Interval clients, "Shorten 2nd Dose Interval – 28 days – [Reason]" (i.e. Highest Risk, Indigenous Community, etc.)
   - **Client**: Auto populated from the client record and should not be updated
   - **Start Date***: Date the alert is being entered. This auto populates to the day the alert is being entered
   - **End Date**: Leave blank
   - **Status**: Input "**Active**" when initially creating the alert



4. Click "**Save**"

Further Context

- Clients who are eligible for Shortened Dose intervals:
  1. Long-Term Care Home, Retirement Home, Advanced Age: Community Dwelling, Indigenous Community individuals
  2. Highest Risk Clients (see below)
- The below conditions are considered "**Highest Risk**":
    - Organ transplant recipients (including patients waitlisted for transplant)
    - Hematopoietic stem cell transplant recipients
  - People with neurological diseases in which respiratory function may be compromised (e.g. motor neuron disease, myasthenia gravis, multiple sclerosis)
  - Haematological malignancy diagnosed less than one year ago
  - Kidney disease eGFR< 30
  - One essential caregiver for individuals in the groups listed above

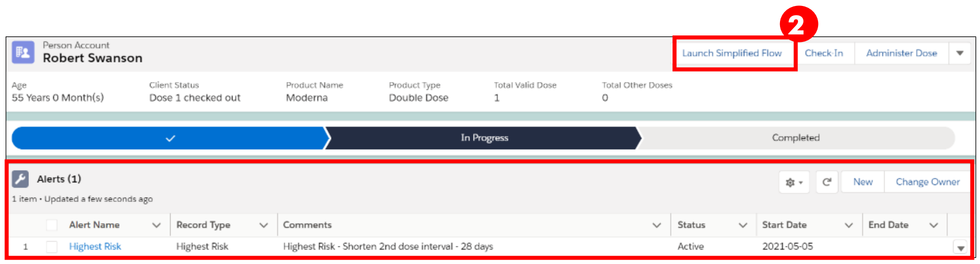
4. Check-in the Client

Description:

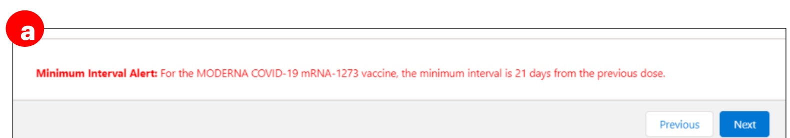
Proceed with checking in the client for either their Dose 1 or Dose 2. Access the "**Launch Simplified Flow**" directly from the client's record.

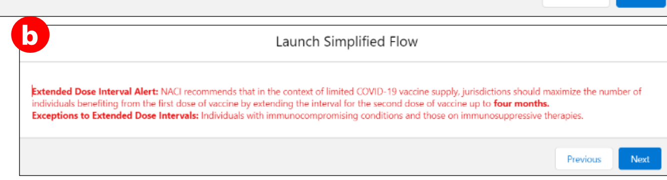
How:

1. From the client record, add or review any alerts. Use the information in the alerts to determine if they are eligible for check in. For example, if a client is eligible to receive their second dose in a shorter time interval, they will be able to check in for their second dose earlier than the 4-month extended interval.



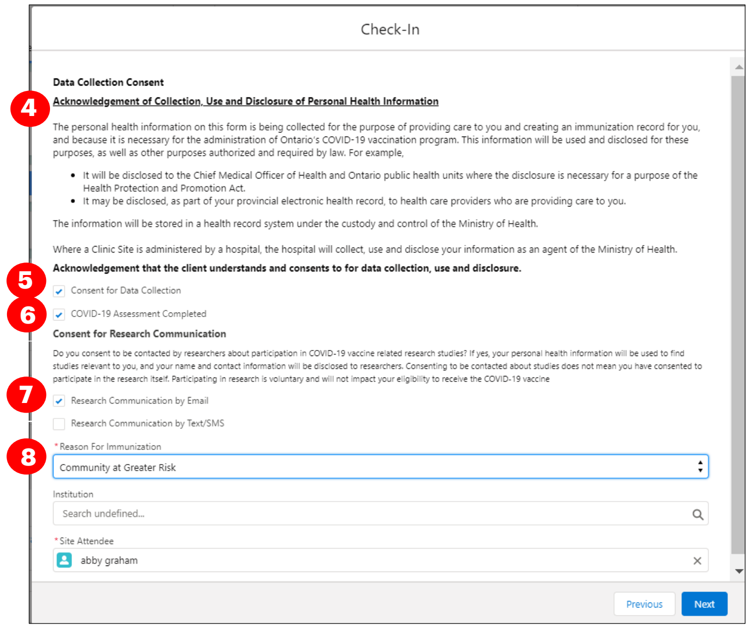
2. From the client record, navigate to the right-hand corner of the screen and click **"Launch Simplified Flow"** to begin checking in the client using the Simplified Flow.
3. **When checking in Dose 2 clients** (for double dose vaccines only), an information pop-up will appear with details from Dose 1. Review the information (the product that was given for dose 1 and the number of days that have elapsed since their first dose).
   During check-in for dose 2, the number of days since their previous dose must be reviewed for two reasons:
   a. Confirm that the minimum interval of days has passed between dose 1 and dose 2 for that vaccine product type (e.g. 21 days have elapsed for Moderna)
   b. Confirm that the client has waited the 4-month interval extension before receiving dose 2 (Unless they are eligible for a shortened interval). This 4-month extended interval has been recommended by National Advisory Committee on Immunization





- If either of these intervals have not passed, the clinician will receive a warning when checking the client in. The clinician may bypass this warning if a client is eligible to receive Dose 2 earlier than the 4-month interval extension. Ensure any client record alerts have been reviewed before assessing the eligibility of time intervals. Once reviewed, check the box to indicate that they are eligible to receive their second dose (Assuming criteria above has been met). Click **"Next"** to progress to check-in

4. Read the disclosure statement out loud to the client. Also find this disclosure statement in the clinical package to print out to be used on-site if needed.
5. Obtain client consent for data collection. If the client does not consent, no further data should be entered in COVax$_{ON}$ and the offline paper process should be followed for vaccination (refer to the "**Appendix A: Offline Document Process**" for details on the Offline Process)
6. Ensure the COVID-19 assessment has been completed and check the associated box. Users should verbally ask the client if this assessment has been completed. This is a mandatory checkbox
7. Obtain the client's **"Consent for Research Communication**" by reading the disclosure statement aloud. If the client consents, check either the "**Research Communication by Email**" or "**Research Communication by Text/SMS**" box depending on what the client provided.



8. The Reason for Immunization field will show the value that was populated on the client record. If this was not populated on the client record previously, select the relevant option from the dropdown. This is a mandatory field and when entered during check in gets populated on the client record. If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or "**Youth 12^{+}**", the Institution field will become mandatory. For all other Reason for Immunization values selected, the Institution field is optional. For all other selected Reason for Immunization values, the Institution field is optional. Refer to the Further Context section below.
9. Click "**Next**".

Further Context

- Clients can also be searched from the "**Clients**" section of the Vaccination Event (by navigating to the "**Related**" tab and selecting "**View All**" and applying filters). This is a useful consolidated view of all clients at the VE.
- The minimum interval between doses is calculated based on the client's last administered dose in status "**Administered**", "**Invalid**" or "**Inventory Recalled**". This is because when a client's dose administration (DA) record status is changed to "**Invalid**" or "**Inventory Recalled**", the client did in fact receive the dose. However, they will require another dose if for example the dose was incorrectly administered (i.e. dose was invalid because the client received another vaccination too close to the COVID-19 vaccination), or the inventory was deemed not to be fully effective (i.e. inventory recalled).
- As consent is gathered during check-in, this information will be saved and reflected on the client record at the bottom of the screen

- If a client has the "**Inactive**" checkbox populated on their record, users will receive an error when attempting to check in a client. The user must remove the "**Inactive**" checkbox from the client record to proceed with check in.
- If a client is associated to a retirement home that is unlicensed and therefore is not an option from the search field, select the "**Retirement Home: Not Listed**" option

Module 2 : Administer the Vaccination

5. Select the Vaccine Type

Description:
Select which vaccine product will be administered to the client for either Dose 1 or Dose 2.

How:

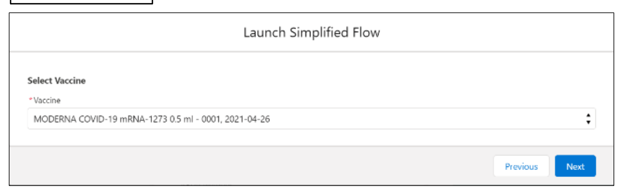
1. Select the proper vaccine to administer to the client (for either Dose 1 or Dose 2).

- The vaccine inventory that is available at the Vaccination Event will be available for selection from the drop-down. If you do not see values here, this indicates that there is no inventory linked to the VE.
- 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 is eligible to 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.

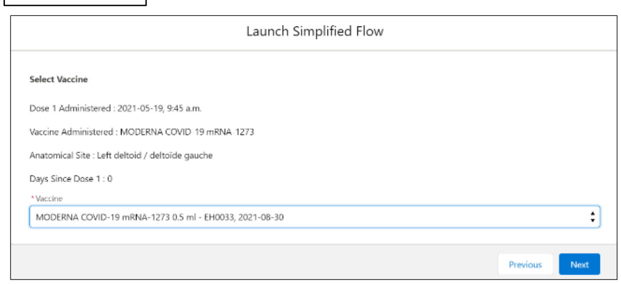
Note: Clients with the "**Reason for Immunization**" as "**Youth 12⁺**" (ages 12-17) must receive Pfizer as their vaccine product. If a non-Pfizer product is selected the user will receive a warning message as other vaccine products have not been approved for youth clients. If the Vaccinator chooses to bypass this warning message, they must check the "**Administer Dose Outside of Clinical Guidelines**" box and populate the "**Reason**" field with a description. The Vaccinator can click "**Next**" and continue with the pre-screening assessment. This information will be saved on the client's dose administration record and can only be edited by Site Super Users.

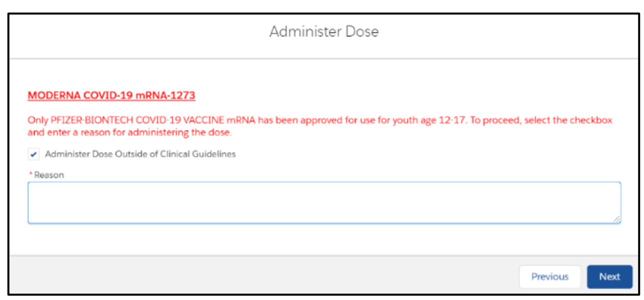
2. After selecting the vaccine product for either Dose 1 or Dose 2 click **"Next"**.

Dose 1



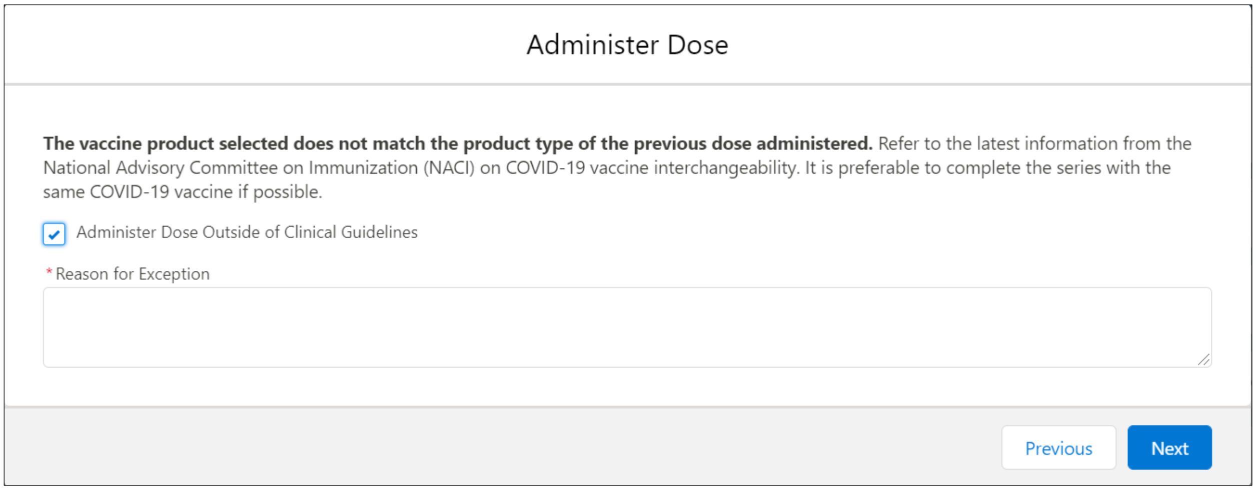
Dose 2





Interchangeability for dose 1 and 2 product types:
When administering a different product for a client's second dose, for example Pfizer, Moderna, AstraZeneca and COVISHIELD, a warning message that can be bypassed will appear. If bypassed, you need to populate additional details before proceeding with the process:

- Check the "**Administer Dose Outside of Clinical Guidelines**" box
- Populate the "**Reason for Exception**" free text field with additional details
- Select "**Next**". This information will be saved on the client's dose administration record

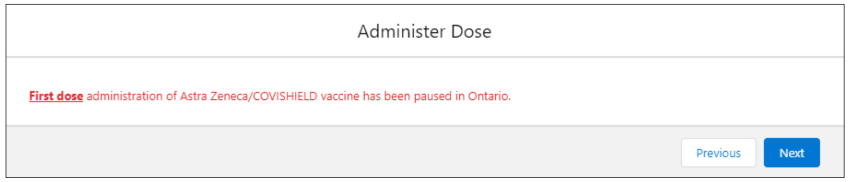


- If the client being vaccinated with a different product for their second dose is a Youth, a warning message will appear on the same screen shown above if a non-Pfizer product is being selected.

Further Context

- The naming convention for each vaccine/diluent is consistent and reflects of the information on the physical labels. For example:
  - Pfizer – *"PFIZER-BIONTECH COVID-19 VACCINE mRNA"*
  - Moderna – *"MODERNA COVID-19 mRNA-1273"*
  - AstraZeneca – *"ASTRAZENECA COVID-19 VACCINE"*
  - COVISHIELD – *"COVID-19 COVISHIELD"*
  - Janssen – *"JANSSEN COVID-19 VACCINE*
- 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/AstraZeneca = at least 28 days from the previous dose
  - JANSSEN = A single dose vaccine, no minimum client interval

- Based on new provincial guidelines, the AstraZeneca and COVISHEILD vaccines have been paused for first dose administration in Ontario. An error message will appear if a user tries to administer a first dose to a client.

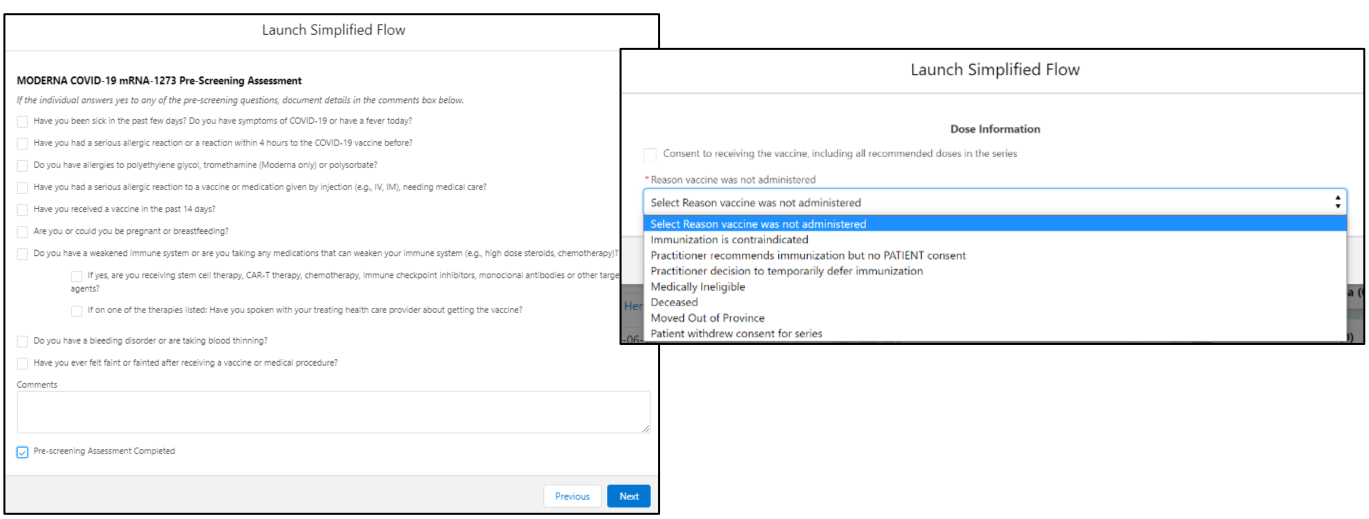


6. Conduct Pre-Screening Assessment

Description:
Begin the Pre-Screening Assessment for the vaccine product that was selected. Once the assessment is finished, determine whether it is safe for the client to receive the vaccine.

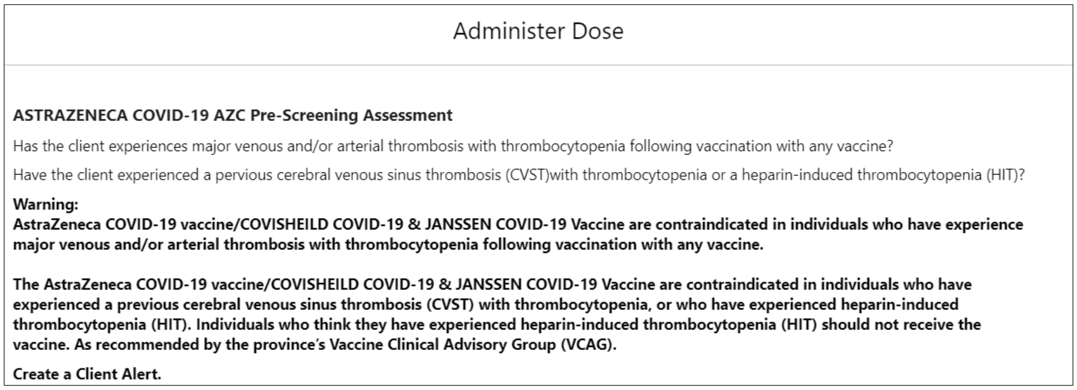
How:

1. Perform the appropriate **Pre-Screening Assessment** for the vaccine. If the client responds **"Yes"** to any of the questions, ensure to check the corresponding question checkbox.
2. Use the final checkbox "**Pre-Screening Assessment Complete**" to confirm completion in COVax$_{ON}$. This is a mandatory checkbox to be recorded for all vaccine product types. The user may use their clinical knowledge to input any comments for the client on this screen.
3. Based on the Pre-Screening Assessment, the Vaccinator must also use their clinical knowledge to determine if the client should receive the vaccine.
   a) If **Yes** (client may receive a vaccine), proceed to Section 7: "**Record Consent and Fill in Dose Administration Details**".
   b) If **No** (Client cannot receive a vaccine), input reasoning in the "**Comments**" box. Check the "Pre-screening Assessment Completed checkbox and click "**Next**". On the next screen, do not select the consent checkbox, and select the relevant **"Reason Vaccine was not Administered"** from the drop down. Select one of the below options which will save on the client record after populating and selecting "**Next**" and "**Finish**":
      - "**Immunization is contraindicated**"
      - "**Practitioner decision to temporarily defer immunization**"



Notes

- There is a "**Historical Pre-Screening Assessment**" section within the client's dose administration record that shows responses to any pre-screening checklist questions that were removed based on vaccine guidelines.
- The pre-screening assessments for AstraZeneca, COVISHIELD, and Janssen products have an added warning message at the top related to contraindications. If the client has a contraindication, an alert should be created on their client record, and the client should not receive the vaccine. They can rebook their dose appointment for a later time.



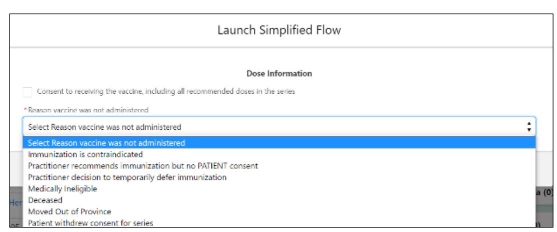
7. Record Consent and Fill in Dose Administration Details

Description:
Obtain and record the client's consent for service and specific dosage information in the Dose Information screen. Review the details of the dose for accuracy and complete the dose administration.

How:

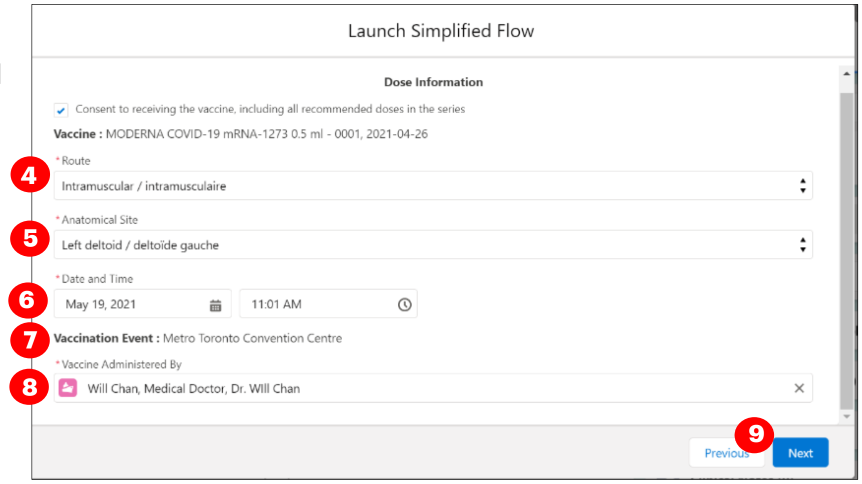
1. Ask for verbal consent from the client for receiving "**all recommended doses in the series**". For double dose vaccines, once consent is obtained for the first dose, the client's consent will carry over into their second dose, but the client can revoke that consent later.
2. If they do not consent to receive a dose, select the "**Reason Vaccine was not Administered**" from the dropdown list. Select one of the below which will save on the client record after populating and selecting "**Next**" and "**Finish**":

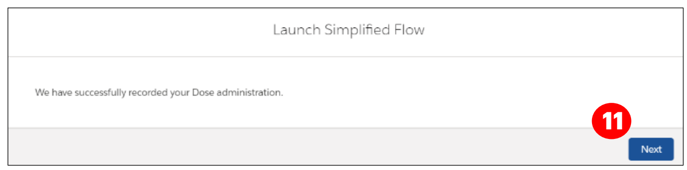
- **Dose 1**: "**Practitioner recommends immunization, but patient did not consent**"
- **Dose 2**: "**Patient withdrew consent from series**"



3. If client consents, confirm the accurate Vaccine Name (automatically populated based on selection from 1st screen) and for Pfizer vaccines, search for the available diluent

4. **Route** will be pre-populated and only have 1 option available.
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. See the Further Context section below for additional details.
9. Click **"Next".**
10. Review your selections to ensure all the data entered is accurate and click "**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. A pop-up will confirm that the system has successfully recorded the dose administration. Leave this window open and click "**Next**."





Note: After administering a dose and the "**Finish**" button is selected, the inventory level in the COVaxON system will be automatically decremented.

Further Context

- When populating the "**Provider**" in 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. Please have the provider validated by your Site Lead and have the details in the table prepared prior to contacting your site lead:

Field	Field Entry		
Provider First Name	Free text – enter the first name		
Provider Last Name	Free text – enter the last name		
Provider Role *(Choose Option)*	Medical Doctor Medical Resident Nurse Practitioner Nursing Student	Other Designation Paramedic Practitioner Pharmacist Pharmacy Student Pharmacy Technician	Registered Midwife Registered Nurse Registered Practical Nurse Respiratory Therapist
Identifier	Free text – enter the identifier number		
Identifier Type *(Choose Option)*	Professional license number	Provincial health human resource identifier Other Identifier Type	

	Medical identification number of Canada Health regulatory college member number	

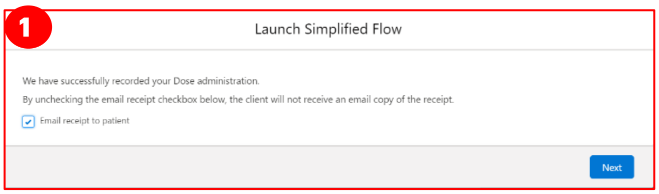
Module 3: Check-Out

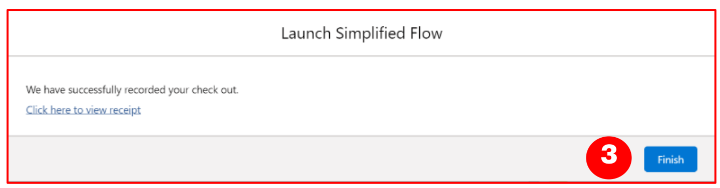
8. Client Check Out

Description:
The last step in the Simplified Flow process will complete the client's check out. 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.

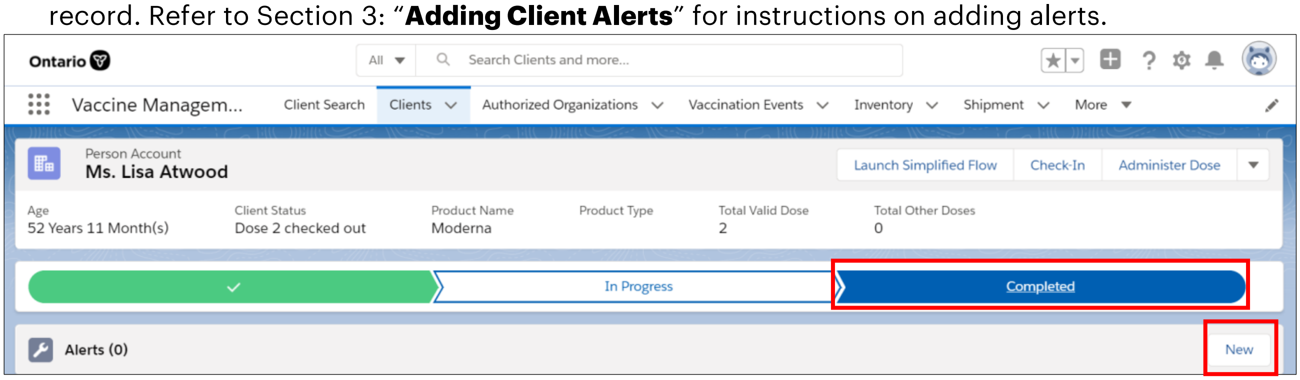
A) During the Client Check-out in Simplified Flow

1. If the client provided an email address and would like to receive an email copy of their receipt, leave the checkbox checked. If not, uncheck the **"Email receipt to patient"** box.
2. Click **"Next."**
3. A pop-up will appear confirming the system has recorded the client's check-out. Click **"Finish"** to save the Dose Administration record.





- Once the Simplified Flow is complete, the client status will move from "**New**" to "**Dose 1 checked out**" (or for the client's second dose, their status will move from Dose 1 checked out to Dose 2 checked out). The status bar will indicate "**Completed**" when all doses in the series have been completed.
- In COVaxON, there is an option to create an "**Alert**" for a client on their client record. If the client requires an alert to be logged (i.e. if there is information about an AEFI to be logged, a warning, or the client is eligible for a shortened dose), users would populate the details of the alert and save it to the client's record. Refer to Section 3: "**Adding Client Alerts**" for instructions on adding alerts.

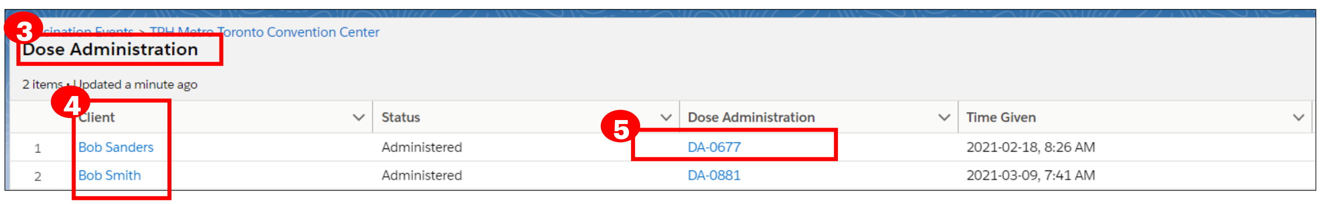


- All clients should be checked out of COVax$_{ON}$ as part of their final step in the dose administration process. However, if a client was not properly checked out of COVax$_{ON}$, the system will automatically check the client out 7 days after their dose administration. After 7 days, the client's "**Dose 1** or **Dose 2 Administered**" status will change to "**Dose 1** or **Dose 2 Checked out**"
- If a client would like their dose receipt, it can be generated using the "**Generate Receipt**" functionality from the dose administration record
- If the client's status is changed to "**Dose 1 Checked Out**" and they have consented to research communication, they will receive an email from CANVAS.

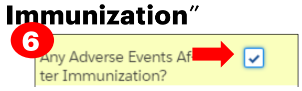
B) Documenting Any AEFI & Checking Out

If the client does not experience AEFI while at the location after their 15-minute wait, there is no need to edit the Dose Administration record.

1. If the client experienced any AEFI, treat the client for the AEFI that occurred.
2. From the client record, open the relevant Dose Administration record on the right side of the client record, by selecting the hyperlink.
3. If not already on the client record, navigate to the Vaccination Events tab, select the relevant VE, navigate to the "**Related**" tab and click on **"View All"** under Dose Administration.
4. Apply the relevant filters/sorting – for example, filter by "Client Name."
5. Locate the client's Dose Administration record and select the hyperlink (for example DA-0677).

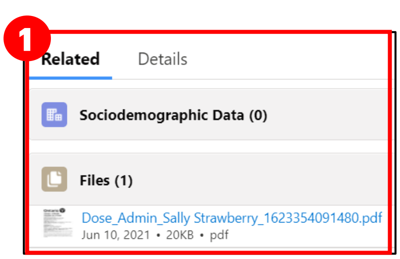


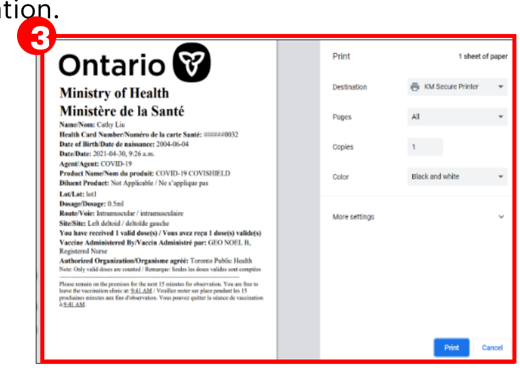
6. From the Dose Administration record, check off the "**Any Adverse Events After Immunization**" checkbox



C) Printing Proof of Vaccination Receipt

1. After the client has been checked out, navigate to the "Related" tab and open the client's PDF receipt for printing.
2. Once the receipt PDF opens, select "**Download**" to open it in a separate tab.
3. Select the option to print the receipt. Retrieve the printed receipt and provide to the client.
4. Provide the client with receipt and relevant discharge information.

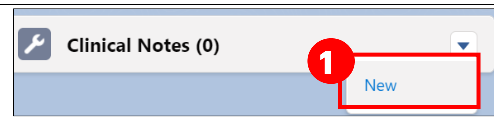




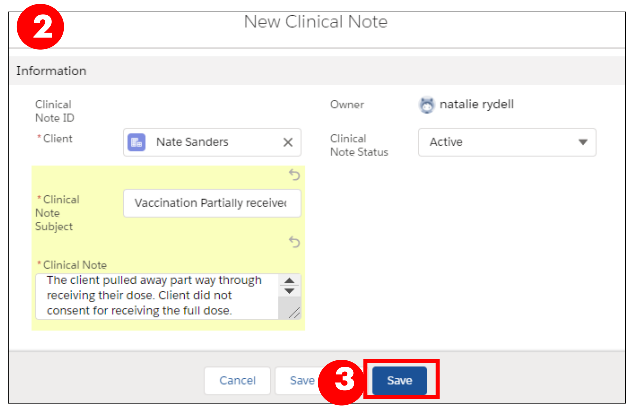
9. Add Clinical Notes to Client Record

Description:
Clinical notes can be added on the client record to summarize any important information regarding the client's vaccination.

How:



1. From the desired client record, select the arrow next to "**Clinical Notes**" and select "**New**"
2. Populate the required clinical note fields:
   - **Clinical Note Subject*:** Type of note
   - **Clinical Note*:** Description of the situation
   - **Clinical Note Status:** Select "**Active**"
3. Click "**Save**"



Notes:

- Clinical Notes cannot be edited once created and are limited to 5000 characters. However, the status field of a note can be edited by Site Super Users.
- "**Entered in Error**" status can be used if the note was entered by mistake, for example if entered on the incorrect client or on a duplicate client.

Appendix A: Offline Document Process

Description: There are 4 situations whereby data cannot be captured in COVaxON and offline word document forms (*COVaxON Vaccine Data Entry & Manual Receipt Form)* must be used to capture the client's vaccination information:

Situation for Offline Documentation	**Resolution**
The Client doesn't consent to data collection during check-in: in this case, the client information should be documented outside of COVaxON	• The form should be stored following location procedures and the data should not be entered in COVaxON
The COVaxON system goes down (connectivity is lost) during vaccinations taking place	• The forms should be used to enter the data into COVaxON by a User with access when it is available • The data should be entered in COVaxON retroactively within 72 hours of the vaccination date.
A mobile vaccination team conducting vaccinations at a rural/remote location without connectivity	
A temporary team of staff are conducting vaccinations who are not trained on COVaxON or are not Users of COVaxON	

There are various versions of offline data entry forms depending on the product. They are contained within the Ministry of Health SharePoint and there is a dedicated contact per location that has access to the SharePoint and can disseminate the documents further.

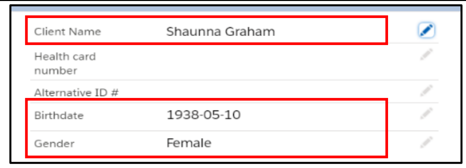
Appendix B: Client Record Best Practices

Description:

COVaxON Simplified Vaccination Event Flow

On the client record, ensure that all required, and highly encouraged fields are populated. This will ensure that client records are accurate and contain the information required to validate the client's identity and avoid duplicate client record creation.

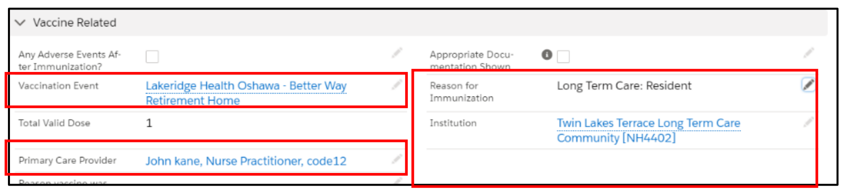
Required Fields:



- **Last Name:** The first name is not required, but should be entered
- **Gender:** Select a gender from the drop-down options available
- **Date of Birth:** Select DOB using calendar icon, YYYY-MM-DD
- **Reason for Immunization**: This field should be populated on the client record. If it is not initially populated on the client record upon arrival, it will be required during the check-in process. This is a mandatory field and the most accurate value should be selected - <u>do not</u> default to "**Other Priority Population**". If the Reason for Immunization is set to Congregate Living, Long Term Care, Retirement Home, or "Youth 12+", the Institution field below will become mandatory (see Institution field details below).

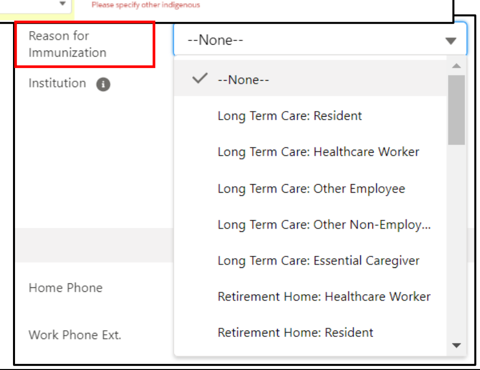
Highly Encouraged Fields:

- **Health Card Number (10-digits only):** Best unique identifier to prevent duplicate clients in COVaxON. If a client does not have an HCN, request an "Alternative ID" to be provided (i.e. drivers' licence, passport, birth certificate, etc.).

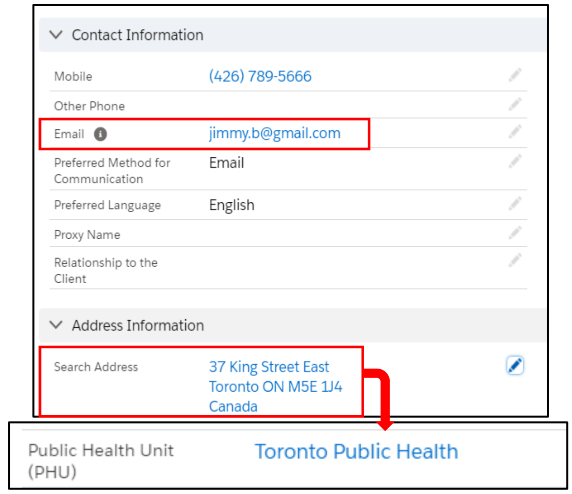


- **Vaccination Event:** Populate based on where the client is physically receiving the vaccine.
- **Indigenous:** If the client is identified as Indigenous, indicate the specific status using the drop-down list. If the relevant option is not available from the drop down, select "**Other Indigenous**" and populate the value in the "**Other Indigenous Specify**" field.

- **Primary Care Provider:** Identify the client's Primary Care Provider using the search bar.
- **Institution:** If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or Youth 12+, the appropriate institution field will become mandatory. For example, if the client resides in a LTCH, that institution must be selected. Alternatively, if the client is a youth aged 12-17, their school institution must be selected to proceed. For all other Reason for Immunization values selected, the Institution field is optional.



- **Contact Details:** With the client's consent, collect contact information (phone number and/or email address). If the client would like to receive their immunization receipt via email, the email address field must be populated and the "**Preferred Method for Communication**" is set to email.
- **Address:** Users should type the client's provided address into the "**Search Address**" field which is integrated with Google maps and the address details will be populated to the client's record automatically.
- **Public Health Unit:** PHU field on the client record is auto populated based on the client's postal code. If the mapped PHU is incorrect, users may update the PHU on the client record. If the postal code is deleted from the client record, the PHU remains on the record.



Further Context

- If a client returns for dose 2, and the Reason for Immunization on their record is "**COVID-19: Other employees in acute care, long-term care, retirement homes**", the reason should be updated. Update it to the correct value. If that value causes the institution field to become mandatory, populate that as well.
- The Reasons for Immunization value can change over time and therefore if editing a client record with a retired value, an error will be produced. If an edit to a client record is required and the client received all doses and is therefore not returning, and if the Reason for Immunization on their record is "**COVID-19: Other employees in acute care, long-term care, retirement homes**": the reason will need to be updated to proceed. Update the reason to the correct value. Institutions are required for Congregate Living, Long Term Care Home and Retirement home "**Reason for Immunization**" values, and since the client will not be returning to confirm their institution, select one of the relevant placeholders below:
  - Congregate Living: Unknown (Historical)
  - Long Term Care: Unknown (Historical)
  - Retirement Home: Unknown (Historical)
- If a client is associated to a retirement home that is unlicensed and therefore is not an option from the search field, select the "**Retirement Home: Not Listed**" option

At end of shift, log out of COVax$_{ON}$ and clear the browser cache. Refer to the *User Profile Set Up job* aid for detailed steps. Sanitize shared devices in accordance with location protocols.