## COVax<sub>ON</sub> Creating Tasks for Inter-AO Communications

### Your Profile: COVax Vaccinators, Clinic Coordinators, PCP Vaccinators, Site Super Users

Send and receive communications for users between different AOs within COVax<sub>ON</sub>.

### Creating Tasks

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

| # | Section | Description |
|---|---------|-------------|
| 1 | Overview of "Task" Functionality | Description of the "Task" communication method between COVax<sub>ON</sub> users |
| 2 | How to Send a "Task" Communication in COVax<sub>ON</sub> for Dose Administration Record Updates | Send a request to another user in COVax<sub>ON</sub> to update a Client's Dose Administration Record |
| 3 | How to Receive a "Task" Communication in COVax<sub>ON</sub> for Dose Administration Record Updates | Receiving and completing another user's request in COVax<sub>ON</sub> to update a Client's Dose Administration Record |

### Additional Information

- Refer to the **MOH SharePoint Site** for access to all COVax<sub>ON</sub> job aids and an overview of all functionalities available.

---

**Disclaimer**

**Data Privacy**: Users with access to COVax<sub>ON</sub> 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<sub>ON</sub> 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

---

## 1. Overview of "Task" Functionality

A new method of user communication within the COVax<sub>ON</sub> system has been introduced. This will allow users from different AOs (Authorized Organizations) to send and receive communications between each other within COVax<sub>ON</sub>.

For example, if a dose was administered to a client at the wrong VE (Vaccination Event), and a user notices this error, they can use the "Task" functionality to send a communication to a user at the AO of the incorrectly tagged VE. Once received, the user at the AO of the incorrect VE can reconcile the error on the client's DA record.

For example, if Mary's dose administration (DA) was incorrectly recorded at the Applewood Estates Retirement Home VE, and a user from the correct VE - Orange Grove Estates Retirement Home - notices this, they can send a communication to the user at the AO of Applewood Estates Retirement Home VE. Once the communication is received, the user can use the details outlined in the "Task" to edit Mary's DA record to ensure it is correctly tagged to the Orange Grove Estates Retirement Home VE.

## 2. How to Send a "Task" Communication in COVax<sub>ON</sub> for Dose Administration Record Updates

1. From COVax<sub>ON</sub>, select the 9 dots on the top left of the screen
2. Type "**Tasks**" into the search bar
3. Select "**Tasks**" to open the Tasks window

4. From the new window, users can view any tasks (sent or received). To create a new task, select the drop-down arrow on the left-hand side of the screen and click "**New Task**"
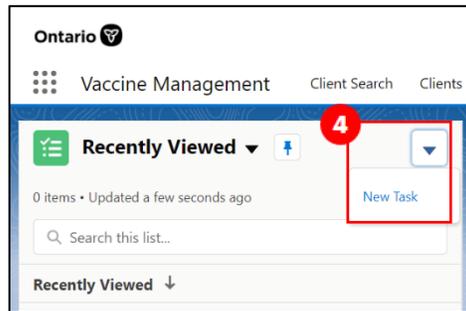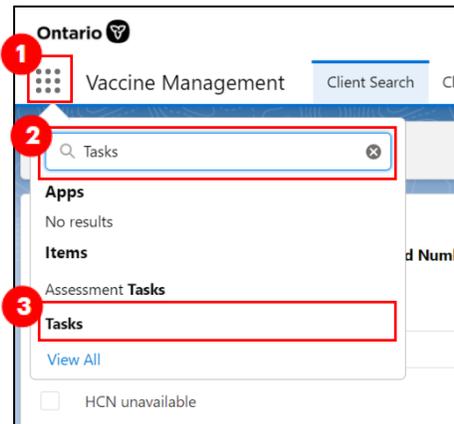


5. Populate the "New Task" window:
   - **Subject**: Enter a descriptor of the task (i.e., "Mark Client [Client ID (SAFE)] DA record as 'Entered in Error'"
     - The "Client ID (SAFE)" field can be found on each client record, towards the bottom in the "System Information" section.
   - **Assigned To**: Search for the user who is meant to receive this Task communication. The user who is assigned to a task will receive an email notification when a task is sent.
     - To determine the user that entered the information on the client's DA record initially, view the "**Created By**" field at the bottom of the DA record
     - To determine the user's AO, select their name hyperlink to open their user details page. From there, you can view what AO they are tagged to
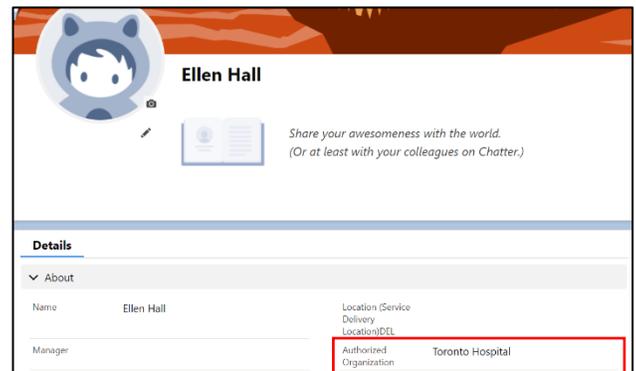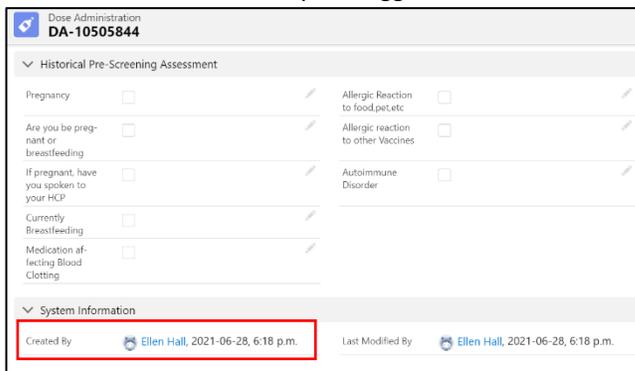


   - **Due Date**: (Optional) Indicate when the Task should be completed by
   - **Name**: Leave blank to protect PHI (Personal Health Information)
   - **Related To**: Use the drop-down arrow to select the relevant record type in COVax<sub>ON</sub> (i.e., Dose Administration), and then use the search bar to indicate the record number
   - **Comments**: Provide a description of the change that is required and why it is required (i.e., "Client's DA record status must be changed to 'Entered in Error' as the client did not receive the dose at this Vaccination Event")

New Task

Task Information

* Subject    Mark Client 0011f000008tlvmAAA D/ 🔍

Assigned To    👤 Rebecca Soloman ✕    Show more »    Due Date    2021-08-13 📅

1 Total Task

Name    🪪 Bob Banana ✕    Related To    🗂 DA-10505844 ✕

Comments    Client's DA record status must be changed to "Entered in Error' as the client did not receive the dose at this Vaccination Event

- **Priority**: Indicate priority level from the dropdown.
- **Status**: Indicate the status of the Task from the dropdown. When creating a new Task, the status should be set to "Open"
- **Reminder Set**: Populate checkbox if you would like to set a reminder for the user
- **Date / Time**: Indicate the date/time of the reminder to be sent to the user
- **Create Recurring Series of Tasks**: Populate checkbox if you would like to have a recurring task. Once selected, additional details will appear, and users can fill in the parameters of the recurrence

Additional Information

* Priority    High ▼

* Status    Open ▼

Other Information

Reminder Set    ☑

Reminder date    On occurrence date ▼

Time    10:00 AM ▼

Create Recurring Series of Tasks
☑

**Frequency**

[Daily]  [Weekly]  [Monthly]  [Yearly]

Repeat

Every Day ▼

Start Date    End Date

Aug 12, 2021 📅    Aug 13, 2021 📅

Save & New    Cancel    Save
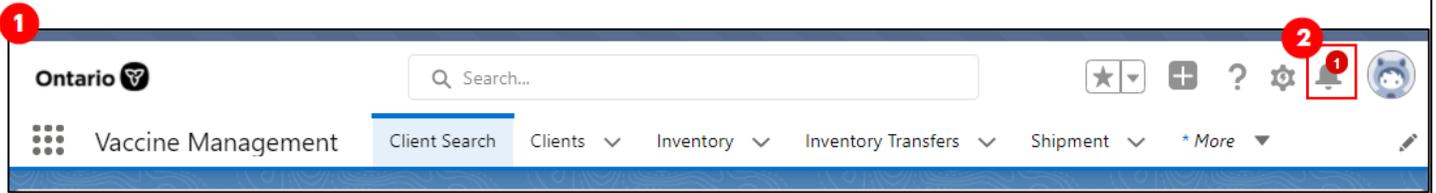
6. Click "Save" and the Task communication will be sent to the user it was assigned to

## 3. How to Receive a "Task" Communication in COVax<sub>ON</sub> for Dose Administration Record Updates

1. When a task has been received, the notification bell at the top right-hand corner of COVax<sub>ON</sub> will appear with a red circle beside it

2. Click on the notification bell to view the outstanding task



3. Select the relevant task and review the request
4. Fulfil the task requirements:
   - *If the Task is related to a specific DA record:* From the task record, click on the "**Related To**" hyperlink to open the Dose Administration (DA) Record. Edit the Dose Administration record, as needed. Refer to the "Edit Dose Admin Records & Merge Duplicate Clients" job aid for more details. Click "**Save**".
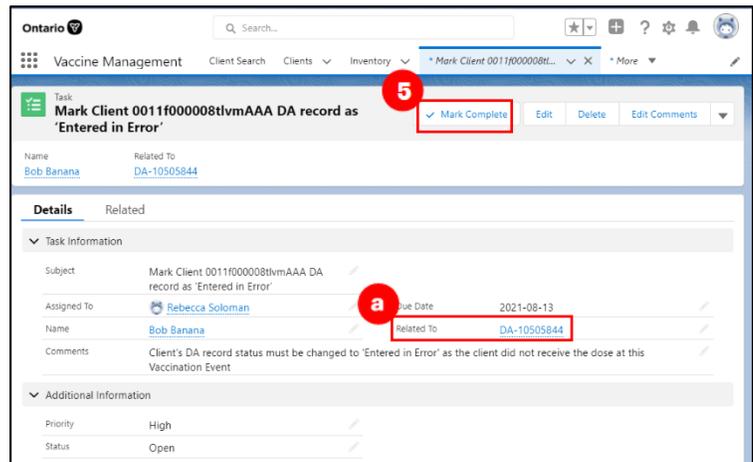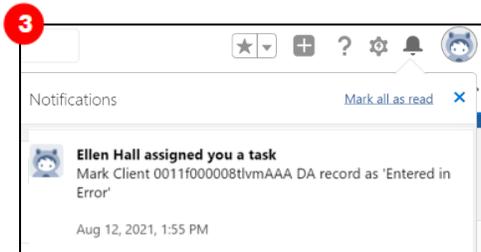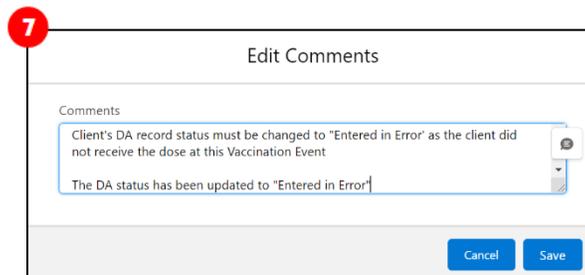


5. Once the task is complete, return to the Task record
6. Click "**Mark Complete**" on the top right-hand side of the Task record to indicate that the task has been completed. The "Mark Complete" button will update to "**Completed**"
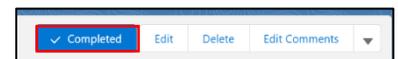7. Comments can optionally be added to the Task Record
   - Select "**Edit Comments**"
   - Add any additional comments and click "**Save**"



**Notes**

- To re-open a task, hover over the "**Completed**" button on the top right-hand side of the task record, and click "Reopen". The button will update to "**Mark Complete.**" When complete, the task can be closed again

- Tasks that are tagged to a specific Dose Administration (DA) record can be found within the DA record itself. Within the DA record, tasks are listed on the right-hand side within the section "**Upcoming & Overdue**." Click on the hyperlink in the task name to view the task record
- Task Reminders can be set-up when creating a Task record, or by editing an existing Task record. From the Task record, Populate the "**Reminder Set**" checkbox and enter the "**Date**" and "**Time**" that you would like to send the next Task Reminder.
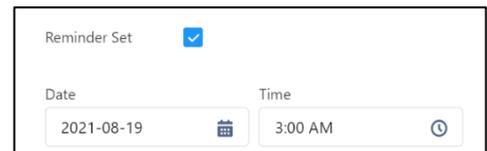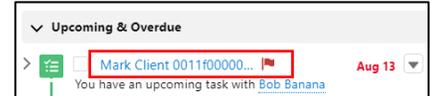
**At end of shift, log out of COVax<sub>ON</sub> and clear the browser cache. Refer to the "Introduction to COVax<sub>ON</sub> and User Set-Up" job aid for detailed steps. Sanitize shared devices in accordance with location protocols.**