

PCP Vaccinators & Clinic Coordinators Job Aid

Your Profile: COVax PCP Vaccinator or COVax Clinic Coordinator

Document client consent for service, complete client dose administration, and record any inventory adjustments at the VE level.

COVax PCP Vaccinators and COVax Clinic Coordinators have the same user profile access as a COVax Vaccinator, along with the ability to record inventory reconciliations at the VE Level.

Vaccine Administration Activities

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

#	Section	Description
1	Confirm Client Identity & Select Vaccine	Confirm client identity, locate client record, and select vaccine details
2	Perform Vaccine Pre-Screening	For dose 1, perform the pre-screening assessment and confirm consent for series. For dose 2 (if applicable), perform pre-screening assessment and ensure consent has not changed
3	Fill in Dose Information	Select and input dose information into COVaxON
4	Review Dose Information	Review dose information before completing the dose record
5	Add Alerts to Client Record	Add alerts to client records for additional information (if needed)
6	Add Clinical Notes to Client Record	Add clinical notes directly to the client record (if needed)
7	Direct Client to Monitor for AEFI	Direct client to self-monitor for AEFI, then the client can proceed to check out
8	Generating Email Dose Receipt After Checkout	If the client would like to receive their receipt via email, and provides consent for email communication, users can re-generate and email the URL link to access the vaccine certificate via the COVID-19 Portal.

VE Inventory Reconciliation Activities

Here are the VE inventory reconciliation tasks you will perform on an as-needed basis.

#	Section	Description
9	VE Inventory Reconciliations	Reconcile inventory at the VE Level for: A. Wastage Events B. Extra Doses from Vial Adjustments C. No Consent Adjustments

Additional Information

- Refer to the “**Introduction to COVaxON and User 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), and merging duplicate client records.
- Refer to the “**Simplified Flow**” job aid if you are a solo clinician performing dose administration, as well as the client check-in and check-out functions.
- Refer to the “**Check- In**” job aid to learn about extra dose eligibility and documentation

Disclaimer

Data Privacy: Users with access to COVaxON 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.** COVaxON 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. Confirm Client Identity & Select Vaccine

Description:

Once the client arrives at the vaccination station, confirm their identity by looking at the details on their client record. Once confirmed, select which vaccine product will be administered.

How:

Client records can be found using either the Client Search tab or the Vaccination Events tab:

A. From Client Search

- Open the “**Client Search**” tab and search for a client using their Health Card Number if available (otherwise search using First Name, or Last Name and one other parameter). If a client record populates, open the client record and ensure the client is tagged to the correct VE.

B. From Vaccination Event Record

- Open the relevant Vaccination Event record and click on the “**Related**” tab. Click “**View All**” under the “**Clients**” list.

Vaccination Event
Rogers Center Toronto March 17

Vaccination Event Type
Mass Immunization Clinic

Related Details

Clients (6+)

Client Name	Health card number	Birthdate	Age
Adam Smith		1989-03-08	32 Years 1 Month(s)
Bob Jones	1361194465	1930-03-19	91 Years 1 Month(s)
Jake Smith		2002-03-21	19 Years 1 Month(s)
Jennifer Anniston	3112245678	1975-03-13	46 Years 1 Month(s)
Mateo Reya	6786788908	1992-03-12	29 Years 1 Month(s)
Matt Rogers		2002-03-24	19 Years 0 Month(s)

View All

- Leverage the filter capability in the top right-hand corner of the page to filter the list by Health Card Number or specific client details (Note: COVaxON saves previous sorting/filtering. When searching for a new client, remember to clear any previous filters).
- Once the client is identified, right click on the client name’s hyperlink, and open the client’s record.

Note: Once the client record is opened, it is essential that the client identity is properly validated to ensure the correct record has been accessed. Validate the client by Health Card Number (if they have one), or by Name **plus** other fields such as Date of Birth, Postal Code, etc. Only validating by name is not enough. Confirm the service stats is “**Checked-In**”.

1. From the client’s record, click the “**Administer Dose**” button.

2.a) If you are administering the client’s first dose, the screen will contain a “**Select Vaccine**” dropdown. If you do not see any inventory values, this indicates that there is no inventory linked to the client’s VE.

b) If you are administering the client’s next dose, you will receive a pop-up with the previous dose information. Review to ensure the client should proceed with the next dose. Inventory that is available at the client’s Vaccination Event will be available for selection from the drop-down.

Note: Clients with the “**Reason for Immunization**” as “**Youth 12+**” (any client age 12-17) should receive Pfizer as their vaccine product. If a non-Pfizer product is selected the user will receive a

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Administer Dose

a

Select Vaccine

Vaccine

MODERNA COVID-19 mRNA-1273 0.5 ml - 2222, 2022-02-16

Next

b

Administer Dose

Select Vaccine

Previous Dose Administered : 2021-07-16, 11:41 a.m.

Vaccine Administered : MODERNA COVID-19 mRNA-1273

Anatomical Site : Right deltoid / deltoïde droit

Days Since Previous Dose : 30

Vaccine

MODERNA COVID-19 mRNA-1273 0.5 ml - 2222, 2022-02-16

Next

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warning message as other vaccine products have not been approved for this age group. If the Vaccinator chooses to bypass this warning message (see screenshot), they must check the “Administer Dose Outside of Clinical Guidelines” box and populate the “Reason” field with a description. Then 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 and Vaccinators.

3. After selecting the vaccine inventory for the dose click “Next”.

The screenshot shows the 'Administer Dose' interface. At the top, it says 'Administer Dose'. Below that, there is a red warning message: 'MODERNA COVID-19 mRNA-1273. Only PFIZER BIONTECH COVID-19 VACCINE mRNA has been approved for use for youth age 12-17. To proceed, select the checkbox and enter a reason for administering the dose.' There is a checkbox labeled 'Administer Dose Outside of Clinical Guidelines' which is checked. Below the checkbox is a text input field labeled '* Reason'. At the bottom right, there are 'Previous' and 'Next' buttons, with 'Next' highlighted in red.

Further Context

- Users with Vaccinator, PCP Vaccinator, Clinic Coordinator or Site Super User profiles can create, edit and view dose administration (DA) records for clients that are tagged to Vaccination Events within their Authorized Organization. However, users have view-only access to DA records for clients that are tagged to Vaccination Events outside their Authorized Organization
- The “Clients” view from the Vaccination Events tab is limited to 2000 records, therefore it is important to leverage filters to ensure there are no missing results (for example, by status, client name, etc.)
- Vaccinators can only administer doses to clients that are associated with a Vaccination Event within their Authorized Organization. This will decrement the inventory associated to the Authorized Organization.
- The naming convention for each vaccine/diluent is reflective of the information on the physical labels:
 - Example: Pfizer: *PFIZER-BIONTECH COVID-19 mRNA 0.3 ml - EK4175, 2021-03-31*
 - Example: Moderna: *MODERNA COVID-19 mRNA-1237 0.5 ml – RP0089, 2021-05-29*
 - Example: COVISHIELD: *COVID-19 COVISHIELD 0.5 ml – 0001, 2021-03-31*
 - Example: ASTRAZENECA: *ASTRAZENECA COVID-19 VACCINE 0.5 ml - 0008, 2021-06-30*
 - Example: JANSSEN: *JANSSEN COVID-19 VACCINE 0.5 ml – LM0997, 2021-05-29*
- There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, service 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” record.
- Minimum product intervals:
 - 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 product (no minimum interval)
- Based on provincial guidelines, the AstraZeneca and COVISHIELD 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.
- **Interchangeability for previous and next product types:** When administering a different product for a client’s next dose, the National Advisory Committee on Immunization (NACI) guidelines state that vaccine interchangeability is now permitted. The previously shown interchangeability warning message has been removed. Please consult your Site Lead for additional clarity on when you might administer doses interchangeably and any further clinical questions you have.

The screenshot shows the 'Administer Dose' interface. At the top, it says 'Administer Dose'. Below that, there is a red warning message: 'First dose administration of Astra Zeneca/COVISHIELD vaccine has been paused in Ontario.' At the bottom right, there are 'Previous' and 'Next' buttons.

2. Perform Vaccine Pre-Screening

Description:

Vaccinators can now begin the Pre-Screening Assessment. Once the assessment is finished, the Vaccinator determines whether the client should receive the vaccine.

How:

1. Perform the appropriate Pre-Screening Assessment for the vaccine product. If the client responds “Yes” to any of the questions, check the corresponding question checkbox.

2. Use your clinical knowledge to record comments related to the client’s conditions if required in the comments box. Clinical notes can also be recorded directly on the client record. See Section 6: “Add Clinical Notes to Client Record” for more details.

3. Check the “Pre-Screening Assessment Complete” checkbox to confirm assessment completion in COVaxON. This is a mandatory checkbox.

4. Based on the Pre-Screening Assessment, Vaccinators must use their clinical knowledge to determine if the client should receive the vaccine.

a) If **Yes** (Client may receive vaccine), proceed to Section 3: “Fill in Dose Information”

b) If **No** (Client should not receive vaccine), indicate that the pre-screening assessment is complete, and click “Next”. On the next screen, leave the consent checkbox blank and populate the “Reason Vaccination was not Administered” drop down field on the client’s record. The selection would be “Immunization was contraindicated” or “Practitioner decision to temporarily defer immunization”. Once populated, the client can then exit the location. In COVaxON, the service status will automatically reset to “New” (for first dose) or, “Checked Out” (for the next doses).

The screenshot shows the 'Administer Dose' interface for a Pfizer-BioNTech COVID-19 vaccine. It features a pre-screening assessment with several questions, a comments box, and a 'Pre-screening Assessment Completed' checkbox. Below this is the 'Dose Information' section, which includes a dropdown menu for 'Reason vaccine was not administered' with options like 'Immunization is contraindicated' and 'Practitioner decision to temporarily defer immunization'. Red circles and boxes highlight specific elements: 1 points to the assessment questions, 2 and 3 point to the comments box, 4 points to the 'Pre-screening Assessment Completed' checkbox, and 'b' points to the dropdown menu in the 'Dose Information' section.

Further Context

- 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 related to contraindications and an added mandatory checkbox confirming that the COVID-19 Vaccine Information sheet has been reviewed with the client. 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.

The screenshot shows the 'Administer Dose' interface for an AstraZeneca COVID-19 vaccine. It features a pre-screening assessment with several questions, a warning message, and a 'Create a client warning' checkbox. The warning message states: 'Warning: The AstraZeneca COVID-19 vaccine/COVISHIELD COVID-19 & JANSSEN COVID-19 Vaccine are contraindicated in individuals who have experienced: • A previous cerebral venous sinus thrombosis (CVST) with thrombocytopenia, and/or • Who have experienced heparin-induced thrombocytopenia (HIT), and/or • Episodes of capillary leak syndrome'. Below the warning, it says: 'Individuals who think they have experienced heparin-induced thrombocytopenia (HIT) should not receive the vaccine. These recommendations were developed with the support of the province's Vaccine Clinical Advisory Group (VCAG). Create a client warning.'

3. Fill in Dose Information

Description:

Obtain and record client consent for service (or consent from a substitute decision maker if the client is Youth 12-17), and proceed to record specific dosage information in COVaxON.

How:

1. For the client's first dose:

- Confirm that the Vaccine Information Sheet has been reviewed with the client and obtain verbal consent for receiving the vaccine, including all recommended doses in the series and populate the checkbox to confirm.
- Details on the Vaccine Information Sheet (details can be found [here](#)).
- Once consent is obtained for the first dose, the client's consent will carry over for subsequent vaccine doses, but the client can revoke that consent later
- If the client does not consent to receiving the vaccine, then populate the "Reason vaccine was not administered" with the selection "Practitioner recommends immunization, but patient did not consent", then click "Next" and "Finish".
- For clients 12-17 years old, **or** clients who are tagged to the Reason for Immunization, "Youth 12+" on their client record, there are two consent scenarios (see below)

2. For the client's next dose (if applicable):

- The consent for receiving the vaccine checkbox will be selected automatically as the consent to receiving the dose series has already been selected during their previous dose. Therefore, begin by directly inputting the dosage information
- If the client changes their consent during their next dose, uncheck the consent checkbox, then populate the "Reason vaccine was not administered" with the selection "Patient withdrew consent for series", then click "Next" and "Finish". On the client record, their status will change back to "Checked out" and the "Reason vaccine was not administered" field will be populated.

Scenario 1- For Youth clients who have a proxy/substitute decision maker consenting for them: Follow the process outlined below by populating the proxy consent checkbox and the proxy information. After completion, continue with the regular dose administration process in COVaxON.

From the Administer Dose screen, select the second checkbox to obtain consent from a substitute decision maker/proxy. Leave the first checkbox blank.

- The following additional fields will appear directly below:
 - a. "Proxy Name" – mandatory field
 - b. "Proxy Phone" – optional field
 - c. "Relationship to the Client" – mandatory dropdown field

When the client returns for next dose, the proxy consent and information must be recorded again.

Scenario 2- For Youth clients who are consenting on behalf of themselves: Follow the process outlined below by populating the consent checkbox. After completion, continue with the regular dose administration process in COVaxON.

From the Administer Dose screen, populate the first checkbox to confirm that the Vaccine Information Sheet has been reviewed and that the client consents to receiving all recommended doses in the series. Leave the second checkbox blank. Following these checkboxes, the Dose Administration process will directly reflect the non-youth client Dose Administration process.

When a client returns for their next dose, the consent for receiving the vaccine checkbox will appear automatically as the dose series consent has already been received during their previous dose. This can be updated if needed.

If the Client consents, proceed to fill in the following fields:

1. Confirm the accurate Vaccine Name (automatically populated based on selection from 1st screen) and for Pfizer vaccines, search for the available diluent
2. **Route** will be pre-populated and only have 1 option available.
3. **Dosage Administered*** If Moderna is the selected product, select the appropriate value from the drop down list (0.25 or 0.5). If other vaccine products is selected a default dosage value is displayed for the selected product
4. **Dosage Unit of Measure*** default value is ml
5. Select **Anatomical Site of Vaccination** from the drop down.
6. Input **Date** and **Time** of vaccination (defaults to current date & time).
7. **“Country Vaccine Administered”** will be pre-populated as **“Canada.”**
8. **Vaccination Event** will be prepopulated based on the Vaccination Event tied to the client’s record.
9. 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.
10. Click **“Next”**.
11. Review your selections to ensure all the data entered is accurate and click **“Next”**. Users should not exit by clicking the “X” on the top right of 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.

Launch Simplified Flow

Dose Information

The Vaccine Information Sheet has been reviewed and client consents to receiving the vaccine and all recommended doses in the series.

Vaccine : PFIZER-BIONTECH COVID-19 VACCINE mRNA 0.3 ml - EW0221, 2027-09-01

* Diluent Event Inventory
 PFIZER Diluent 0.9% Sodium Chloride 0.2 ml - 26110DK, 2023-02-01

* Route
 Intramuscular / intramusculaire

* Dosage Administered
 0.3

* Dosage Unit of Measure
 ml

* Anatomical Site
 Please Select

* Date and Time
 Feb 2, 2022 10:59 AM

Country Vaccine Administered : Canada
 Vaccination Event : VE Mila Test AO3

* Vaccine Administered By
 New DH, Dentist, tset

Previous Next

Note: If the Vaccinator’s name is not available as an option when searching within the “**Vaccine Administered By**” field, it is recommended to submit a request to the ITS team (more details in further context below). However, users can also search for “**Other Clinician, Other Designation, xxx**” and select it as a generic placeholder. This will trigger a second free-text field to become available below called, “**Vaccine Administered By (Other)**”. The Vaccinator’s details should be entered here as: [First Name] [Last Name], [Designation OR Provider Role], [Professional License].

* Vaccine Administered By

Other Clinician, Other Designation, xxx

Vaccine Administered By (Other)

Clay Matthews, Pharmacist, 90877

Further Context

- If you are attempting to administer a dose to a client, your User profile’s Authorized Organization must match the Authorized Organization of the inventory being administered. Otherwise, you will be unable to select the inventory from the Dose Administration screen. The Vaccination Event on the client record must also match the VE inventory record. If you do not see any inventory values, this indicates that there is no inventory linked to the client’s VE.
- Request your Site Lead to submit a request to Information Technology Services (ITS) for the creation of a provider not currently available in the “**Vaccine Administered By**” field. 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 <i>(Choose Option)</i>	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

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Identifier	Free text – enter the identifier number	
Identifier Type (Choose Option)	Professional license number Medical identification number of Canada Health regulatory college member number	Provincial health human resource identifier Other Identifier Type

- To view a list of clients who did not have the vaccine administered, under the “Clients” tab, select “Clients Not Vaccinated” list view. This will show all clients who have a “Reason vaccine was not administered” value populated on their client record.
- If the client is turned away or ends up not receiving the vaccine and they return at a future date, the “Reason immunization was not administered” field on the client record will reset to blank when checked-in again.
- If a user is unable to administer a dose to the client and receives an error instructing them to “Select an alternative Reason for Immunization”. This indicates that the current “Reason for Immunization” is no longer available in COVaxON, and the user must select another option from the “Reason for Immunization” drop-down list before proceeding to administer a dose.

4. Review Dose Information

Description:

After filling in the dosage information, review the details and click through to complete the record.

How:

- Review the details of the client’s dose to ensure all the data entered is accurate and click “Next”
- Click “Finish”. The service status will move to “Administered”. Ensure you do not close the window without clicking “Finish” as this is required to complete the client’s dose administration in COVaxON.

Note: After administering a dose and the “Finish” button is clicked, the inventory level in the COVaxON system will be automatically decremented from the AO inventory record.

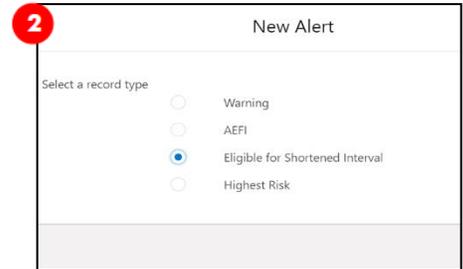
5. Add Alerts to Client Record

Description:

Users can enter an alert on a client’s record to document any important details related to the client that would be helpful when the client returns (i.e. additional comments, any AEFI details, highest risk conditions etc.). This alert appears as a banner on the top of the client record.

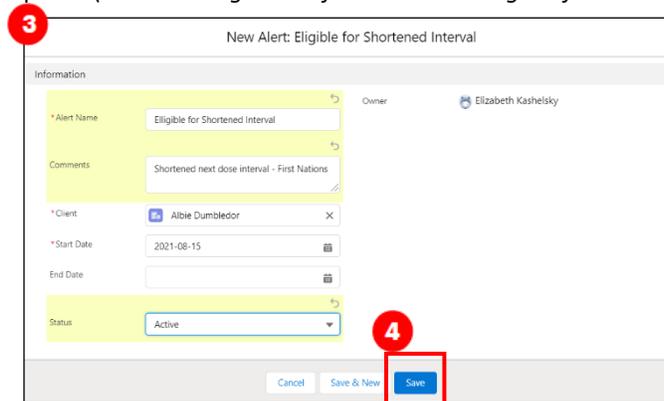
How:

1. From the client’s record, in the “Alerts” section, click “New”
2. Select the 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 after receiving their 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 the alert is created from and should not be updated
 - **Start Date***: Date the alert is being entered.
 - **End Date**: Leave blank
 - **Status**: Input “Active” when initially creating the alert
4. Click “Save”



Further Context

- Alerts can be viewed by all users at the top of a client record and are helpful information for determining how to proceed with the client’s vaccination and confirming if they are eligible to receive the dose at an earlier interval. They are relevant for both single dose and double dose vaccines.
- The alert appears on the client record regardless of status or end date.
- The “End Date” field and “Completed” status may be added in cases whereby the alert no longer applies, for example if the client was but is no longer pregnant. Another example may be if the Vaccinator determined during the pre-screening that the client should return after certain symptoms subside and entered an alert to indicate that. The “End Date” cannot be set in the past.
- The “Cancelled” status may be added if the alert was entered by mistake.
- Users cannot delete alerts and only the creator of the alert can edit the “Comments”
- Clients who are eligible for Shortened Dose intervals:
 1. Long-Term Care Home, Retirement Home, Advanced Age: Community Dwelling, Indigenous Community individuals

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- 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

6. Add Clinical Notes to Client Record

Description:

Users can add one or more clinical note records on the client record to summarize any important information regarding the client’s vaccination

How:

- From the desired client record, click on the arrow next to “**Clinical Notes**” and select “**New**”
- Populate the required clinical note fields:
 - Clinical Note Subject***: Type of note
 - Clinical Note***: Description of the situation
 - Clinical Note Status**: Select “**Active**”
- Once populated, click “**Save**”

Notes:

- Clinical Notes can be created and edited by Vaccinators and Site Super Users. This free text field is 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.

1

2

3

7. Direct Client to Monitor for AEFI

Description:

After dose administration, direct the client to monitor for Adverse Events Following Immunization (AEFI) for 15 minutes.

Note: if any changes are required to the Dose Administration record, refer to the “**Edit Dose Admin Records & Merge Duplicate Clients**” job aid.

1

How:

1. Ensure that the service status is **“Administered”**. Explain the need for the client to wait 15 minutes after their vaccination to monitor for any Adverse Events Following Immunization (AEFI).

Note: In cases where a client experiences an AEFI, this will be recorded during the check-out process described in the **“Check Out”** job aid.

Note: Once a client’s dose is successfully recorded, it will be added to the **“Total Valid Dose”** cumulative field. The **“Total Valid Dose”** field indicates the number of dose administration (DA) records that have been recorded for valid doses (with the DA record status of **“Administered”**). In addition, the **“Total Other Doses”** field will indicate the number of DA records that have been recorded for invalid doses (with the DA record statuses of **“Entered in Error”**, **“Inventory Recalled”** or **“Invalid”**).

8. Generating Email Dose Receipt After Checkout

Description:

If the client did not provide their consent to receiving communication and/or has not provided their email address, they will not receive an email copy of their receipt after checkout. If the client changes their mind and would like to receive a receipt after being checked out, and provides consent for email communication, users can re-generate an email for the dose administration receipt.

1. From the client record, check that the client’s email address field is accurately populated, and the **“Follow-up Communication by Email”** checkbox is populated.
2. Select the relevant dose admin hyperlink under the **“Dose Administration”** panel
3. From the dose administration record, click **“Generate Receipt”**
4. Select the **“Email receipt to client”** checkbox
5. Click **“Next”**
6. Click **“Finish”**. The system will send the email to the client
7. On the client record, the field **“Vaccine Receipt URL”** displays the unique URL link generated to view the client’s vaccination receipt. This link will also be emailed to the client, which will direct them to the COVID-19 Patient Portal.

Person Account
Samantha Heller

Email samantha.heller@gmail.co...

Preferred Method for Communication: Email

Preferred Language: English

Consent for Data Collection:

Follow-up Communication by Email:

5 [Next](#)

Person Account
Jimmy Sandler

Launch Simplified Flow | Check-in | Administer

2 Dose Administration (1)

DA-10505758 | Time Administered: 2021-09-27, 11:06 a.m. | Status: Administered | Record Type: Point Of Service

7 Vaccine Receipt URL: <https://covax.ppe.ontariohealth.ca/443/receipt-identity?receiptId=2MEAASXJV9KE8XA2>

Dose Administration
DA-10505758

Record Type: Point Of Service

Thank you !

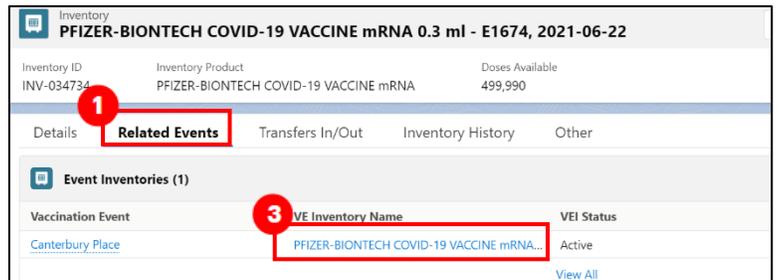
6 [Finish](#)

9. VE Inventory Reconciliations

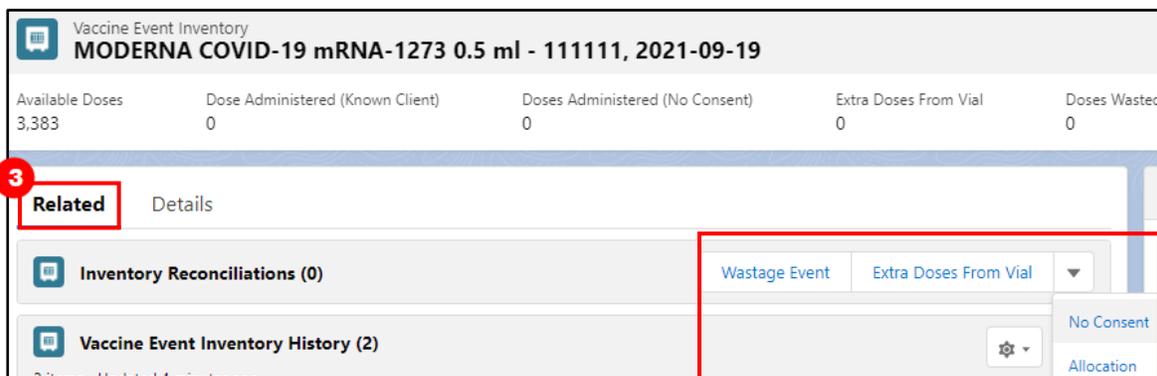
Description:

Inventory reconciliations ensure that the inventory information within COVaxON is reflective of the physical on-hand inventory and there are no disruptions to the ability to vaccinate clients within COVaxON. Reconciliations can occur at both the AO and VE levels. Reconciliation options at the VE level are: **Wastage Events**, **Extra Doses from Vial** Adjustments, and **No Consent** Adjustments. For details on reconciliations at the AO level, see section 7: “**Inventory Transactions at the AO level**” above. When inventory is reconciled at the VE level, it will also be automatically reflected on the parent AO record. To document reconciliations at the VE within COVaxON, use the following process:

1. From the AO inventory record, select the “**Related Events**” tab.
2. Under “**Event Inventories**,” select the relevant Vaccination Event Inventory (VEI) record from the associated “**VE Inventory Name**” hyperlink. You may also click “**View All**” to see the full list of associated records.
3. From the VEI record, navigate to the “**Related**” tab
4. Under “**Inventory Reconciliations**,” select the appropriate reconciliation type and follow the instructions in the below sections:



- 8A. Wastage Events
- 8B. Extra Doses from Vial
- 8C. No Consent



Note:

Users can **not** edit inventory transaction records once they are created. If a transaction is unintentionally/mistakenly created, users must create 2 inventory transactions to reconcile for the mistake:

1. First, create a record to counteract/reverse the original error
2. Second, create a record for the correct reconciliation

8A. Wastage Events

Description:

For wastage events at the VE level, follow the below process. Please note, any excursion/temperature-related wastage events that occur at the VE level should be logged as a wastage event under the VE using the reason, **“Vaccine Stored Temperature Excursion at Clinic”**

- Under Inventory Reconciliations, select **“Wastage Event”**

The screenshot shows a navigation bar with a speech bubble icon and the text 'Inventory Reconciliations (0)'. To the right, there are two buttons: 'Wastage Event' and 'Extra Doses From Vial'. A red circle with the number '1' is placed over the 'Wastage Event' button, which is also enclosed in a red rectangular box.

- Fill in the details of the Wastage Event:

- Inventory Transaction ID:** Unique identifier for each Inventory transaction. Auto populated once saved based on order of creation.
 - Reason*:** Select reason for wastage from dropdown list
 - Start Date/Time*:** Select date and time the wastage occurred.
 - Quantity*:** Enter number of doses wasted
 - Entire Vaccine Inventory Wasted:** Checkbox if the entire inventory record has been wasted. Leave unselected if only a portion of the inventory has been wasted.
 - Notes:** Input any desired notes
- Click **“Save”**.

The screenshot shows a form titled 'New Inventory Transaction: Wastage Event (Vaccination Event)'. It is divided into sections: 'Basic Details', 'Wastage Details', and 'Additional Details'. In the 'Basic Details' section, 'Inventory Transaction Id' is 'MODERNA COVID-19' and '* Vaccine Event Inventory' is 'MODERNA COVID-19'. The 'Wastage Details' section has a yellow background and includes: '* Reason' set to 'WR - ID - Insufficient Dose', '* Quantity' set to '3', and '* Start Date/Time' set to '2021-09-03 12:00 PM'. There is an unchecked checkbox for 'Entire Vaccine Inventory Wasted'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons. A red circle with the number '2' is placed over the top-left corner of the form, and a red rectangular box encloses the entire form area.

Note: Wastage event reconciliations should not be created unless the inventory record is in the status **“Available”**.

8B. Extra Doses from Vial

Description:

All inventory arrives from the manufacturer in vials. Within each vial, there is a designated number of doses yielded (i.e. for Pfizer, each vial is said to yield 6 doses). In some circumstances, extra doses from vials can be yielded (i.e. a Pfizer vial has 7 doses instead of 6). To account for this extra dose, a reconciliation must be made at the VE level. Please note this adjustment type is only available from the VE level since this is where vaccinations will physically be administered.

- Under Inventory Reconciliations, select **“Extra Doses from Vial”**

The screenshot shows a navigation bar with a speech bubble icon and the text 'Inventory Reconciliations (0)'. To the right, there are two buttons: 'Wastage Event' and 'Extra Doses From Vial'. A red circle with the number '1' is placed over the 'Extra Doses From Vial' button, which is also enclosed in a red rectangular box.

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- Fill in details of the Extra Dose from Vial adjustment
 - Inventory Transaction ID:** Unique identifier for each Inventory transaction. Auto populated once saved based on order of creation.
 - Quantity*:** Input number of extra doses from vial that have been yielded
 - Notes:** Input any desired notes
- Click "Save"

8C. No Consent

Description:

When client's do not consent to data collection during the check-in process, their data is recorded in an offline paper form instead of in COVaxON. However, since these clients do receive a dose "external" to COVaxON, the Inventory Manager must ensure that the "No Consent" doses are accounted for at the VE level. To account for these doses, follow the process outlined below. Please note this adjustment type is only available from the VE level since this is where vaccinations will physically be administered.

- Under Inventory Reconciliations, select the drop-down and select "No Consent"

- Fill in details of the No Consent adjustment:
 - Inventory Transaction ID:** Unique identifier for each Inventory transaction. Auto populated once saved based on order of creation
 - Quantity*:** Input number of no consent for data collection doses that have been administered
 - Notes:** Input any desired notes
- Click "Save"

VE Inventory – Field Descriptions

- The status bar on the VEI screen shows the cumulative number of transactions for the Vaccine Event Inventory

Available Doses	Doses Administered (Consent Client)	Doses Administered (No Consent)	Extra Doses From Vial
410	0	0	0

PFIZER-BIONTECH COVID-19 VACCINE mRNA 0.3 ml - EK4175, 2021-03-31			
VE Inventory Name	PFIZER-BIONTECH COVID-19 VACCINE mRNA 0.3 ml - EK4175, 2021-03-31	Inventory	PFIZER-BIONTECH COVID-19 VACCINE mRNA 0.3 ml - EK4175, 2021-03-31
Vaccination Event	Toronto Public Health - Metro Toronto Convention Centre	VEI Status	Active
Inventory Type	Vaccine	Vaccination Type	Point Of Service
Administered Doses	97	Inventory Product	PFIZER-BIONTECH COVID-19 VACCINE mRNA
		Inventory Status	Available
Created By	Ellen Hall, 2021-07-09, 11:05 a.m.	Last Modified By	Ellen Hall, 2021-07-12, 4:03 p.m.

The cumulative VE inventory record will be updated as Inventory Transactions are made:

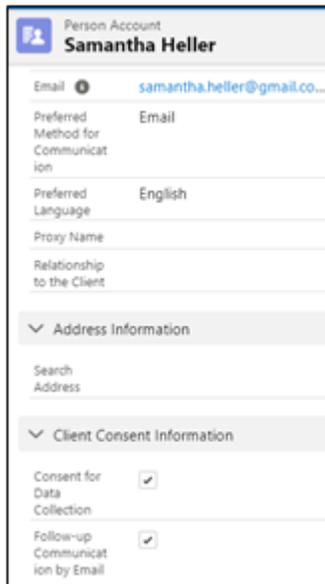
Field	Description
Available Doses	The total number of doses available at the <u>AO</u> level. This field is here so that VE Inventory Managers can view the number of doses available on the parent Inventory record. This may not be representative of the number of doses that have actually been allocated to the VEI. For this number, see the "Allocated Doses" field
Doses Administered (Known Client)	Number of doses administered to clients through regular or simplified flow process in COVaxON at the specific VEI
Doses Administered (No Consent)	Number of "No Consent" Inventory Reconciliations made on the specific VEI
Extra Doses from Vial	Number of "Extra Does from Vial" Inventory Reconciliations made on the specific VEI
Doses Wasted	Number of "Wastage" Inventory Reconciliations made on the specific VEI
Allocated Doses	The total number of doses allocated from an AO Inventory record to VEI (i.e. if the number of doses was 57, and then an allocation transaction is created for 40 doses, the "Allocated Doses" field will show 97 doses).

Generating Email Dose Receipt After Checkout

Description:

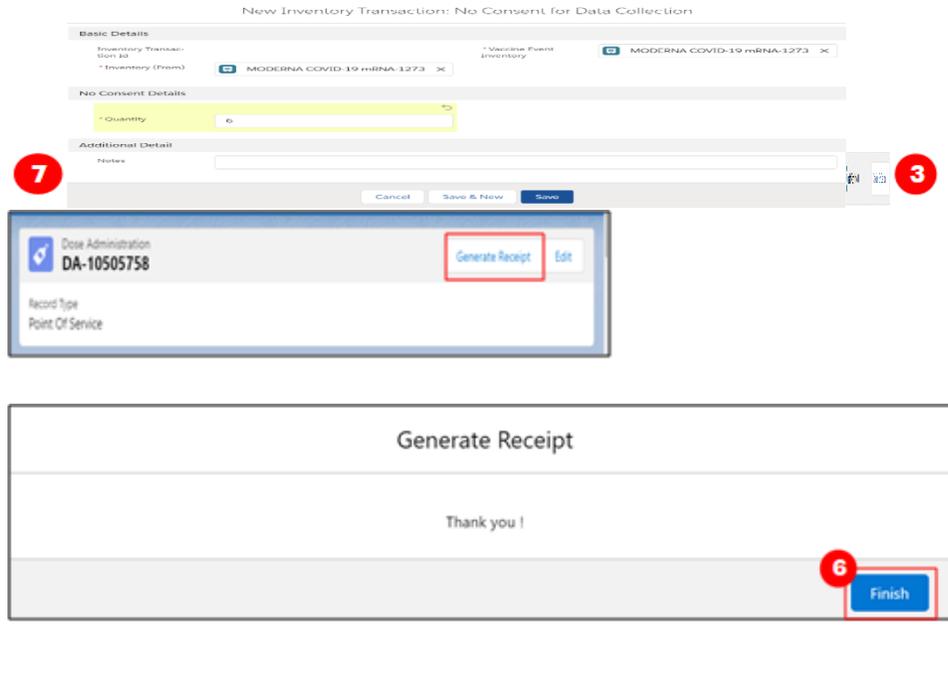
If the client did not provide their consent to receiving communication and/or has not provided their email address, they will not receive an email copy of their receipt after checkout. If the client changes their mind and would like to receive a receipt after being checked out, and provides consent for email communication, users can re-generate an email for the dose administration receipt.

1. From the client record, check that the client's email address field is accurately



2. populated, and the "Follow-up Communication by Email" checkbox is populated.
3. Select the relevant dose admin hyperlink under the "Dose Administration" panel
4. From the dose administration record, click "Generate Receipt"

5. Select the **"Email receipt to client"** checkbox
6. Click **"Next"**
7. Click **"Finish"**. The system will send the email to the client
8. On the client record, the field **"Vaccine Receipt URL"** displays the unique URL link generated to view the client's vaccination receipt. This link will also be emailed to the client, which will direct them to the COVID-19 Patient Portal.



At end of shift, log out of COVaxON and clear the browser cache. Refer to Introduction to COVaxON and User Set-Up job aid for detailed steps. Sanitize shared devices in accordance with location protocols.