Check In Job Aid

Your Profile: COVax$_{ON}$ Site Staff

Record client information on the client record and check client into COVax$_{ON}$.

Client Check-In Activities

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

#	Section	Description
1	Locate Client Record in COVax$_{ON}$	When client arrives, search for their record in COVax$_{ON}$ by using either the "Client Search" or "Vaccination Events" tabs or Global Search.
2a	Create New Client Record in COVax$_{ON}$	If the client was not found in COVax$_{ON}$, create a new client record
2b	Record Verified Client Chosen Name	A new "Verified Chosen Name" field has been added to the client record. Please do not use this field at this time. Guidance will be provided at a later date.
3	Alerts & Client Check-In	Check in the client, requesting data and communication consent
4a	Gather Additional Client Information	Ensure all mandatory fields are populated and add any additional information to the client record
4b	Gather Sociodemographic Information	If consented, gather client sociodemographic information
5	Appendix A: Offline Document Process	Description of offline document process that can be used when COVax$_{ON}$ is inaccessible, or a client does not consent to data collection
6	Appendix B: Client Record Best Practices	Description of the mandatory and highly encouraged fields on the client record
7	Appendix C: Extra Dose Documentation	Process for Documentation of "Extra Doses," which includes any dose of a COVID-19 vaccine that is administered in addition to the two previous COVID-19 vaccine doses that a client has received
8	Appendix D: Verifying Appointment Confirmation Numbers	For clients who have scheduled their appointments using the province-wide booking system, verify that they have successfully booked their appointment before checking them into COVax$_{ON}$

Additional Information

- If you are a solo user performing client check-in, dose administration and check-out functions, please refer to the "**Simplified Flow**" job aid for more information.
- Refer to the "**Introduction to COVax$_{ON}$ 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.

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

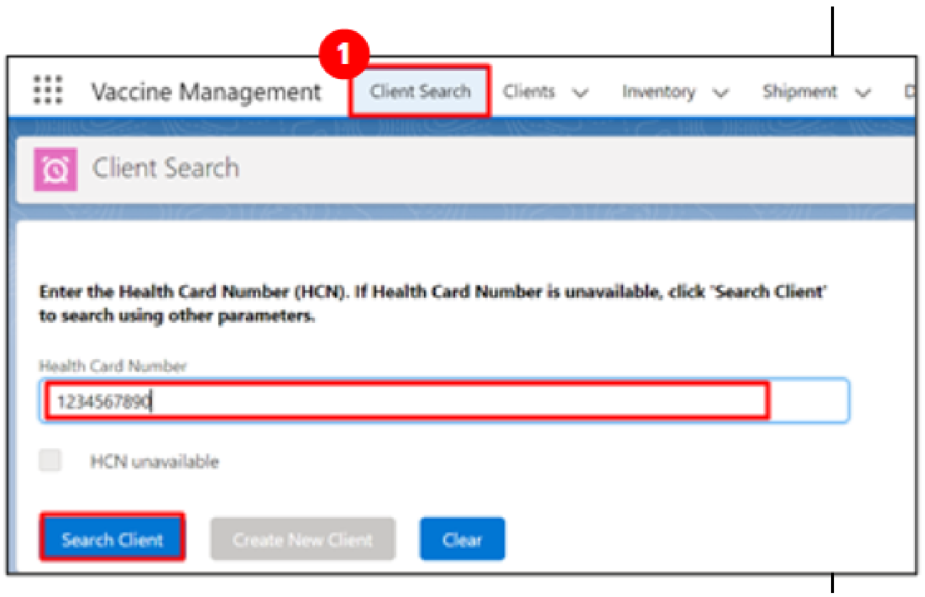
1. Locate Client Records in COVax$_{ON}$

Description: Once the client arrives at the check in station, verbally verify that they have completed the COVID-19 assessment then follow the steps below to locate the client record through the "**Client Search"** tab (Method A) or the **"Vaccination Events**" tab (Method B).

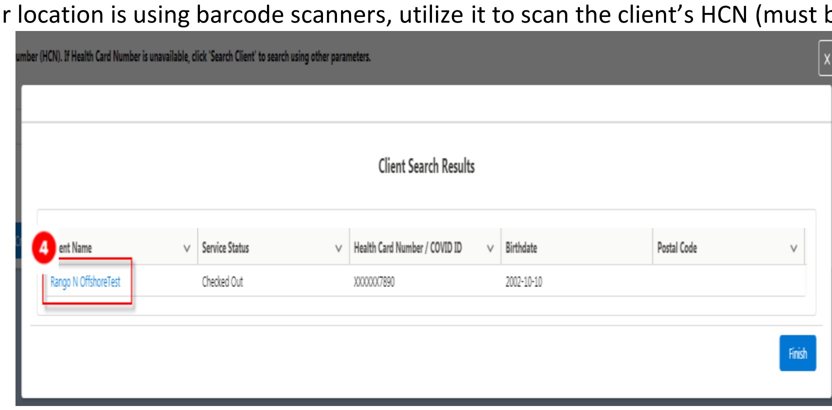
Method A: Search for the client record using the “Client Search” tab

Method A: Scenario 1 - If the client has a health card number

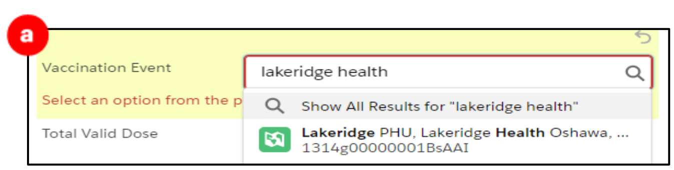
Description:
If the client provides you with an HCN, use the following steps:



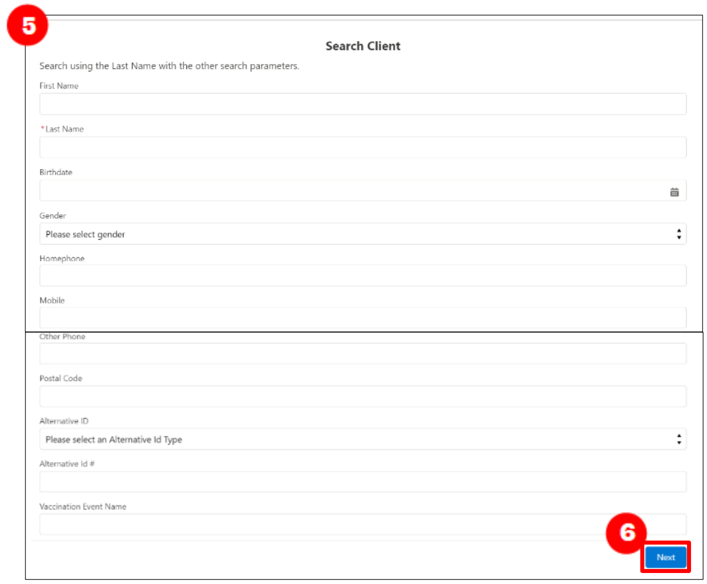
1. Click on the “**Client Search**” tab
2. Manually enter the clients HCN, or if your location is using barcode scanners, utilize it to scan the client’s HCN (must be a 10-digit number with no spaces/dashes).
3. Click the “**Search Client**” button to complete the search.
4. If results are produced, click the desired client’s name and their record will open in a new tab. From the client record, confirm that the client is tagged to the correct Vaccination Event (VE), and validate other client information.



4a. If the client’s VE is incorrectly tagged, Vaccinators will not be able to administer a dose to a client. Search and select the proper VE and save it on their client record.



5. If results are not produced, a screen will appear to enter other client identifiers. The search must include the client's last name. In addition, it is recommended to include the client's First Name, Birthdate and/or Postal Code to narrow the search. All available search parameters include:
   - First Name
   - Last Name*
   - Birthdate - Only present or past dates can be entered
   - Gender
   - Phone (Home, Mobile, Other) – Recommended to have no dashes or spaces in the middle
   - Postal Code – Recommended to be in the format "A1A 1A1", with no dashes and a space in the middle

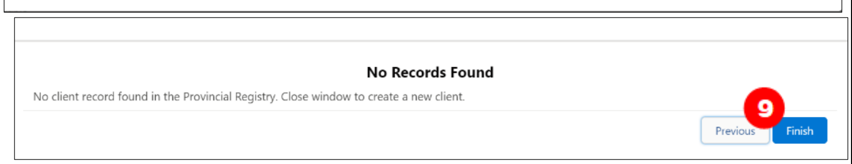


   - Alternative ID: Select an Alternate ID type from the dropdown, select "Other" if the type of identification presented is not available from the dropdown list
   - Other Alternative Id, please specify this is a free text field which should be populated if "Other" is selected for the "Alternative ID" field)
   - Alternative Id #: Enter if an Alternative ID is entered.
   - Vaccination Event Name (free text field – must be an exact match)

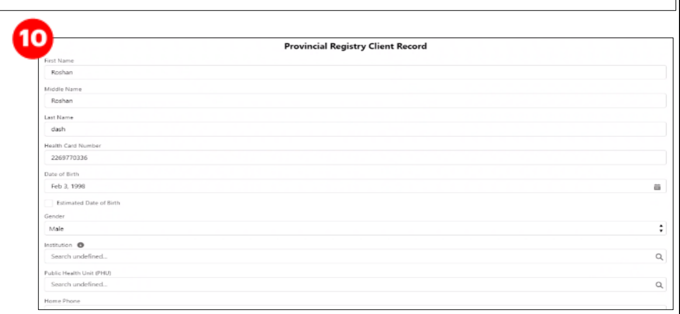
Note: Search parameters must be an exact match, fuzzy matches will not return results. A fuzzy match means that the name is similar, but not exact. For example, short forms of names such as "Matt" instead of "Matthew".

6. Click "**Next**"
7. If results are produced, click the desired client's name open their record and complete the check-in process.
8. If no results are produced, you will be directed to an option to search the Provincial Registry. This is an integration between COVax$_{ON}$ and the Provincial Registry (which contains information of residents registered under OHIP). Click "**Next**" to continue.

9. If there is no exact match for the client's HCN found in the Provincial Registry, a pop-up message will display saying "**No Records Found**". You may click the "**Previous**" button and modify the HCN if there was a mistake or click "**Finish**" and proceed to **Section 2** below.

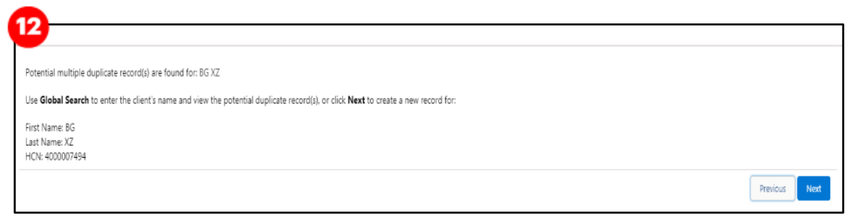


10. If an exact match is found, a record will appear with the details from the Provincial Registry. Review the client details and validate the information to ensure it is the correct client (for example, validate their birth date). Click "**Next**".



11. If you would like to proceed with client creation, select "**Next**" and proceed to **Section 2** below. If you do not wish to proceed with client creation, click the **"X"** on the top right corner of the screen to cancel.

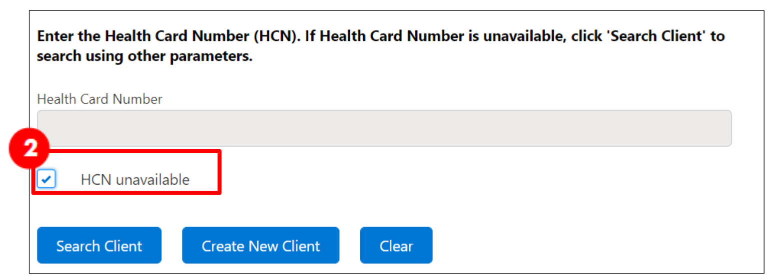
12. If a client record exists in COVax$_{ON}$ (but does not include an HCN), and the HCN is searched within the Provincial Registry, if a duplicate is found, users will receive a warning message to confirm whether they like to continue with the client creation. Once created, the client records will be flagged as duplicates in the system and can be merged if required. If they are unique records, users should ensure they are mindful of using the correct record and continue without merging. Refer to the "**Edit Dose Admin Records & Merge Duplicate Clients**" job aid for further details.



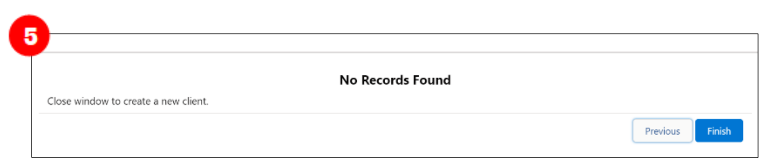
Method A: Scenario 2 - If the client does not have a health card

Description:
If the client does not exist after searching their HCN, or they <u>do not have an HCN,</u> use the following steps:

1. Click on the "**Client Search**" tab
2. Click on the "**HCN unavailable"** checkbox and click "Search Client"
3. A screen will appear to enter other client identifiers. The search must include the client's last name as well as any other search parameters. See Step 5 in Scenario 1 above for details.
4. If results are produced, click the desired client's name and their record will open in a new tab. From the client record, confirm that the client is tagged to the correct Vaccination Event (VE), and validate any other client information.



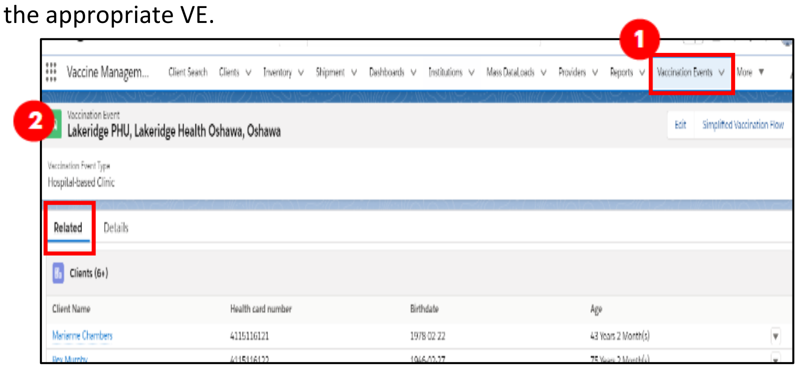
5. If results are not produced, a pop-up message will display saying "**Close window to create a new client**". You may select the "**Previous**" button and modify the client identifiers if there was a mistake or click "**Finish**" and proceed to Section 2 below.



Method B: Search for the client record using the "Vaccination Events" tab

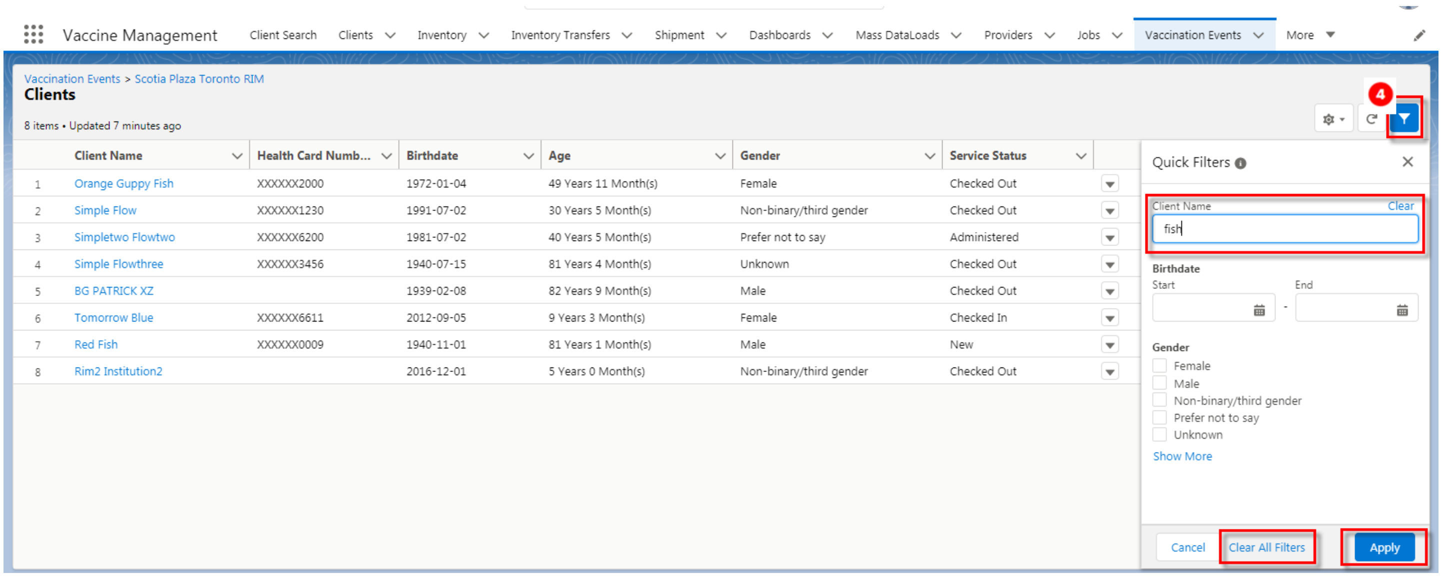
1. Navigate to the "**Vaccination Events**" tab and select the appropriate VE.
2. Click on the "**Related**" tab and scroll down to see a list of clients tagged to the VE.
3. Scroll down and click "**View All**" to see the list

4. From the client list, select the filter icon
5. If your location is utilizing barcode scanners, click the "Health Card Number / COVID ID" field and scan the client's health card barcode. The information will populate in the selected field.
6. If your location is not utilizing barcode scanners, manually enter the relevant information. For example:



a) Enter client HCN or COVID ID (recommended parameter to use)
b) Enter client name (if they do not have an HCN)
c) Filter clients by HCN

7. Click “**Apply**”. If the search produces results, select the desired client’s name to navigate to their client record. (Note: this view 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.)).



8. Validate other identifying information on the client record to ensure it is the correct client (for example, validate their birth date). Update any missing information, then proceed to Section 3.

Notes:
- If results are not produced, try to search using the “**Client Search”** tab (explained above). If a search from the **Vaccination Event** and **Client Search** tabs do not produce results, proceed to Section 2.
- COVax$_{ON}$ saves any previous filters on the VE tab. The filters must be cleared before performing a new search. Click “**Clear All Filters**” and “**Apply**” before performing a new search.

Method C: Global search for the client record using the “ID” Unique Identifier

Description: This field is a unique client identifier that will be read-only and is visible to all users. Users can reference this unique ID to identify a client and searchable within COVax$_{ON}$.

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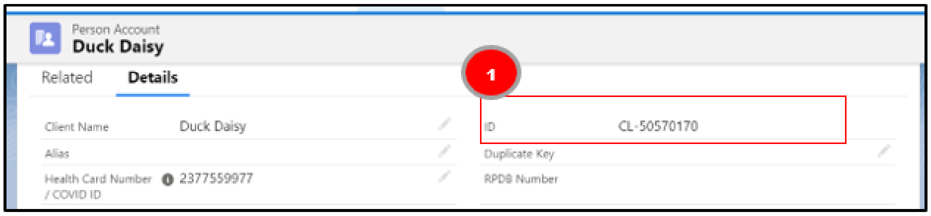
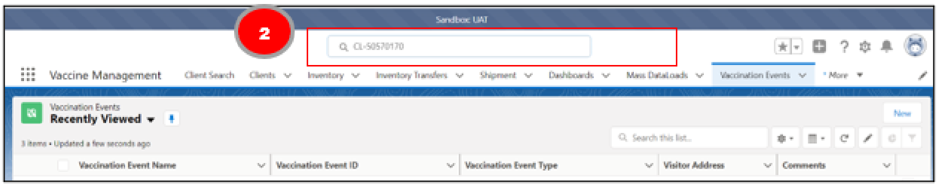
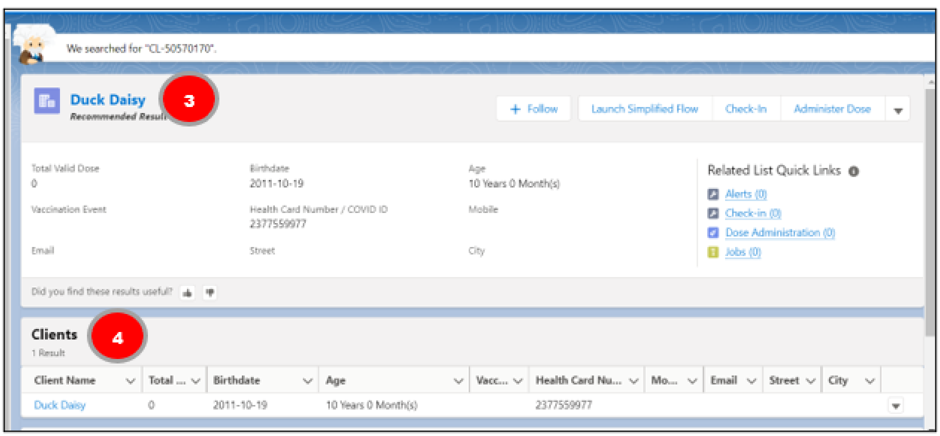
1. Once a new client record is created in COVax$_{ON}$ a unique client identifier number is auto generated and displayed on the Person Account section on the client screen.



2. Navigate to the global search box on any screen in n COVax$_{ON}$ and enter the ID for the client and hit enter to search for the client



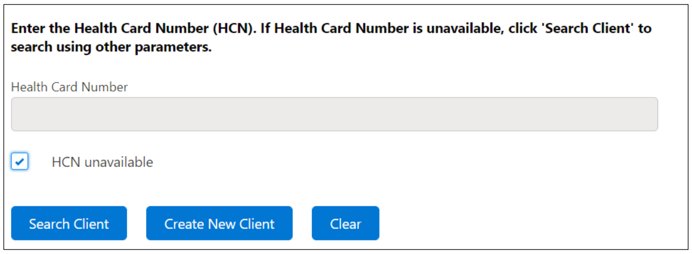
3. The search result displays the client record found based on the unique ID entered.
4. Click on the client's name link to view the client details.



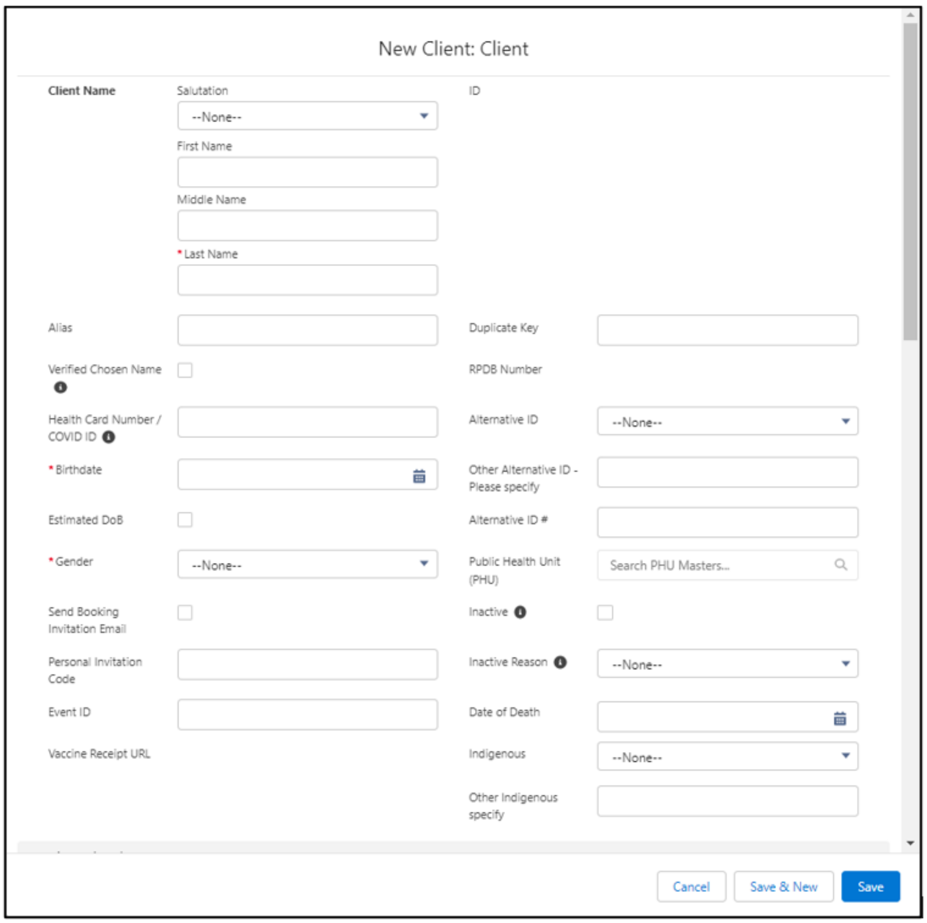
2a. Create New Client Record in COVax$_{ON}$

Description:
After searching for the client using the above processes, if it is determined that the client does not exist in COVax$_{ON}$, their record must be created manually. Please refer to the established clinical processes for approving new clients before creating new records in COVax$_{ON}$. When creating a new client record, it is important to capture as much information as possible and ensure accuracy. Refer to "**Appendix B: Client Record Best Practices**" for information about populating the client record.

1. From the “**Client Search**” tab, click “**Create New Client**”



Note: The “**Create New Client”** button will be unavailable until the user has attempted to search for the client using the “**Search Client**” button (Section 1 above).

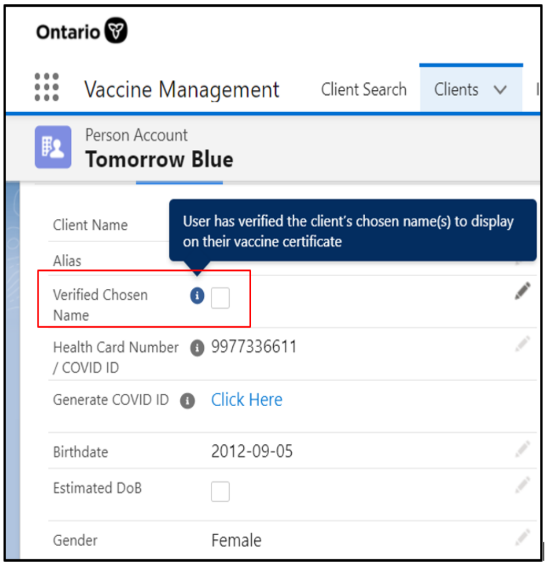


2. A new client information window will open. Proceed to fill in client information. Refer to “**Appendix B: Client Record Best Practices**” for details on populating the client record.
3. Click “**Save**”. You will be brought to the client record. Follow Section 3 to continue with client check in.

***Note**: Duplicate client entries may be detected in the system, refer to the “**Further Context**” information below.*

2b. Record Verified Client Chosen Name

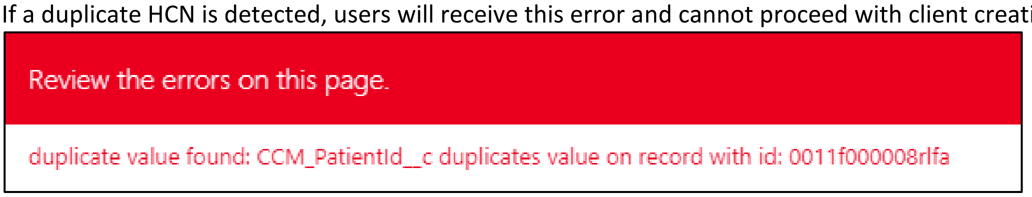
For this release, a new “Verified Chosen Name” field has been added to the client record. **Please do not use this field at this time. Guidance will be provided at a later date.**



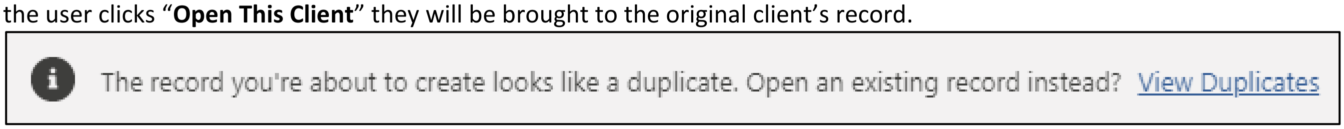
Further Context

- A duplicate client will be detected in the system if:
  - There is an exact match on the HCN, or,
  - A combination of other demographic information such as a name match on 2 or more of First Name (exact or approximate), and Last Name (exact or approximate), and **ONE OF:** Date of Birth (exact match), Postal Code (exact match), OR Phone number (home, work, mobile, other) (exact match). *The phone number and the phone type must match (will not cross references across different types).*
  - *Note: a fuzzy match means that the name is similar, but not exact. For example, short forms of names such as "Matt" instead of "Matthew". However, fuzzy matches for French names will not be detected.*
- If COVaxON detects that a duplicate client record is being created, one of the following messages will appear:

1. If a duplicate HCN is detected, users will receive this error and cannot proceed with client creation.



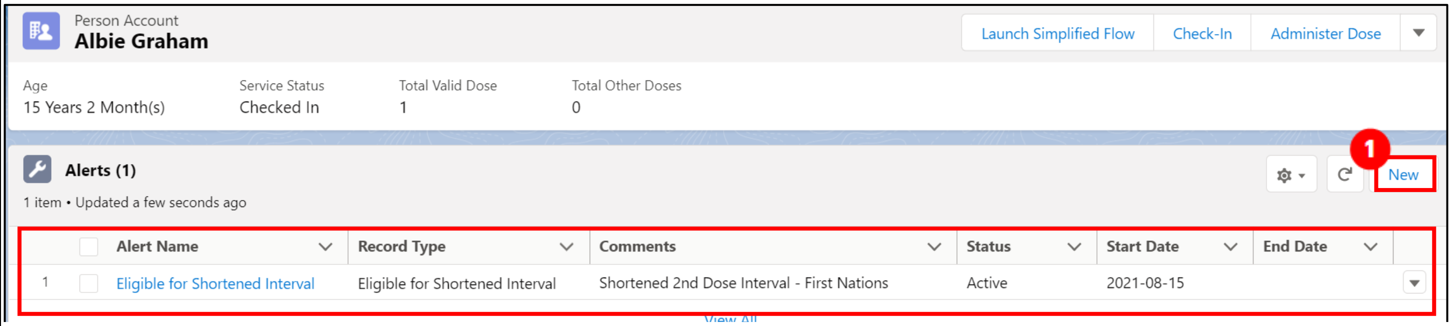
2. If duplicate demographic information is detected, users will receive this warning message, which can be bypassed if deemed appropriate. To determine if the warning should be bypassed, users can click **"View Duplicates**" to see the other client records in the system for comparison. It is highly encouraged that users ensure that they are not in fact creating a duplicate client. If the user clicks "**Open This Client**" they will be brought to the original client's record.



Note: Please refer to the "**Edit Dose Admin Records & Merge Duplicate Clients**" Job for more details on duplicate records in COVaxON.

3A. Alerts & Client Check-In

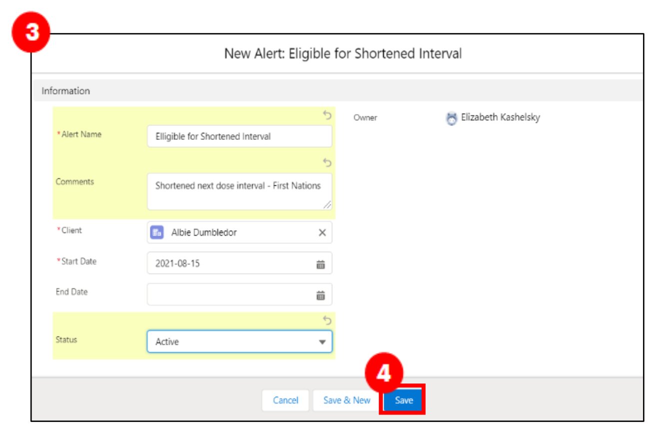
Description: Once the client record has been located and opened in COVax$_{ON}$, add or review any alerts on the record. Once reviewed, proceed with checking in the client.



Please note:
For clients who have scheduled their appointments using the province-wide booking system, verify that they have successfully booked their appointment before checking them into COVax$_{ON}$. See Appendix D below to verify client appointment bookings. For all other clients, proceed with the below steps.

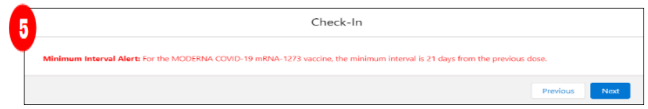
How:
From the client record, add any new alerts or review any existing alerts. For example, if the client is considered to be "**Eligible for Shortened Interval**", Site Staff can review this alert to determine if the client is eligible for vaccination. To add a new alert:

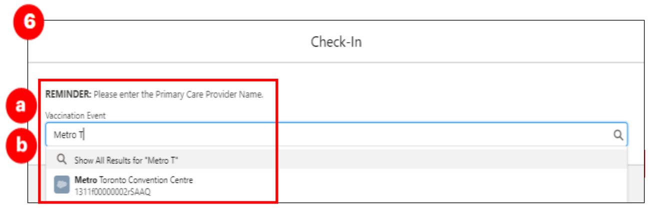
1. Click "**New**" from the Alerts section
2. Click alert type being created:
   - "**Warning**" may be for a client who has a fear of needles
   - "**AEFI**" may be for any specific information related to an AEFI they experienced on their previous dose
   - "**Eligible for Shortened Interval**" may 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



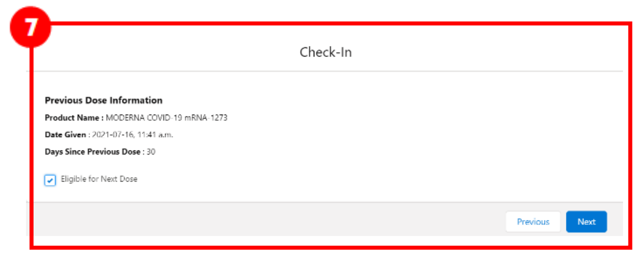
3. Populate the Alert fields:
   - **Alert Name*:** Enter the Alert Type, followed by a description. (i.e. "Warning: Fear of Needles" or "Eligible for Shortened Interval"). See further context section below for eligibility.
   - **Comments**: Any additional comments about the situation. For Shortened Interval clients, "**Shorten 2nd Dose Interval – 28 days – [Reason]**" (i.e. Highest Risk, Indigenous Community, etc.) should be populated.
   - **Client**: Auto populated from the client record 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**". Once saved, Users will be unable to delete alerts and only the creator of the alert can edit the "**Comments**".

After the relevant alerts have been reviewed/added, ensure that the client has completed the COVID-19 Assessment before progressing through the clinic. Once completed, proceed to check the client in.

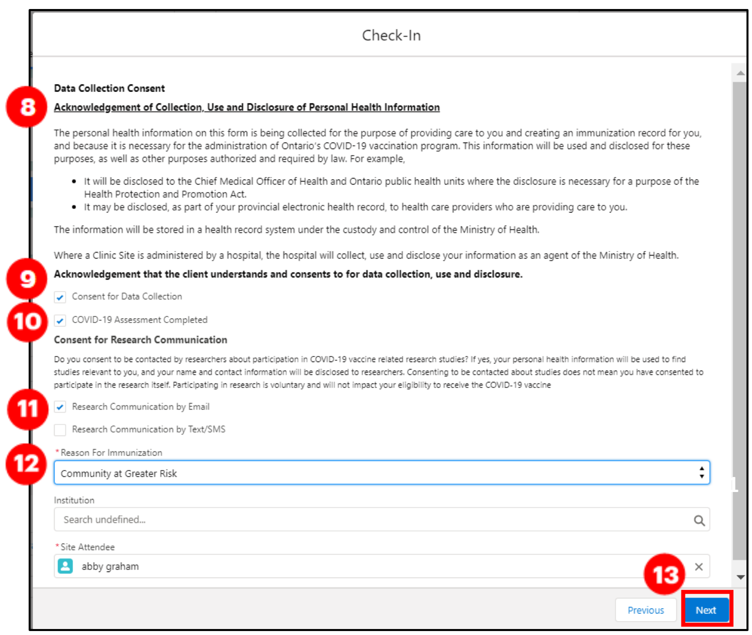




5. Click the "**Check-In**" button on the top right of the client record.
6. A screen will appear with the following:
   a) A reminder to enter the client's Primary Care Provider (PCP) on their record if this field is currently blank. The PCP field is not mandatory but is highly encouraged to support the sharing of client vaccine information with a client's PCP. Please see Appendix B below for further details on PCPs.
   b) If the client's record does not have a Vaccination Event pre-populated prior to check-in, search for and enter the Vaccination Event. If the client's record already has a VE populated, it will pre-populate on the check-in screen, but can be edited/updated if needed. Click "**Next**"



7. When checking in clients for their next dose (for multi-dose vaccines only), an information pop-up will appear with details from previous doses. Review the information (the product that was given previously and the number of days that have elapsed since their previous dose). During check-in, the number of days since their previous dose must be reviewed:
   - Confirm that the minimum interval of days has passed between doses for that vaccine product type (i.e. 21 days have elapsed for Moderna)
   - If this interval has not passed, the clinician will receive a warning when checking the client in. The clinician may bypass this warning if needed. Click "Next" to progress to client check-in



8. Read the disclosure statement out loud to the client. You may also find this disclosure statement in the clinical package to print out and post on-site if needed.
9. Obtain the client's consent for data collection and check the **"Consent for Data Collection"** checkbox. This checkbox indicates if the client consents to their personal data being entered in COVaxON. This is a mandatory checkbox. If the client does not consent, no further data should be entered in into COVaxON and the user must close this screen and continue with the offline paper process (refer to "**Appendix A: Offline Document Process**" for further details)
10. Populate the "**COVID-19 Assessment Completed**" checkbox. This is a mandatory checkbox.
11. Obtain the client's **"Consent for Research Communication"** by reading the disclosure statement aloud. If the client consents, check either/both of the "**Research Communication by Email**" or "**Research Communication by Text/SMS**" boxes.
12. Select the relevant Reason for Immunization from the dropdown if not already populated. This is a mandatory field, and the most accurate value should be selected. If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or Child and Youth Eligible Population**,** the Institution field will become mandatory. For all other Reason for Immunization values selected, the Institution field is optional. For additional details on this, refer to **"Appendix B: Client Record Best Practices".**
13. Click "**Next**".
14. Click "**Finish**"

Further Context

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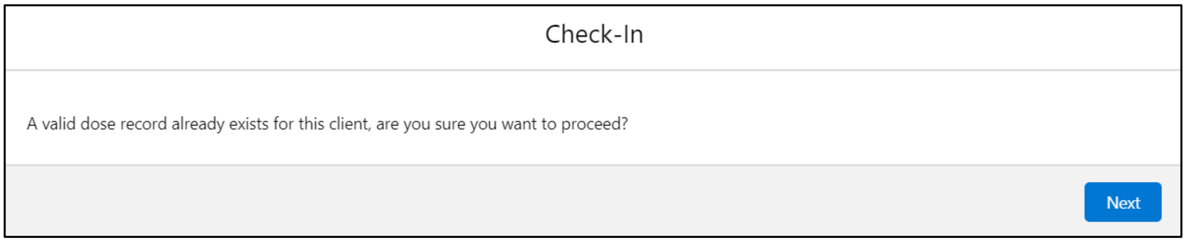
- Users will receive a warning message when attempting to check in a client if another dose administration record had been created for the same client in the last 24 hours, with the status "**Administered**". In this scenario, after selecting "**Check In**" on the client record, the following warning message will be displayed.



- If a dose administration record was entered incorrectly, the DA status must be updated. Refer to the "**Edit Dose Admin Records & Merge Duplicate Clients**" job aid for more details.
- 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 uncheck the box to proceed with check in.
- 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).
- The consent information that is gathered during check-in will be saved and reflected on the client's record.
- Vaccinators are unable to administer a dose to a client until they have been successfully checked in.
- Clients who are eligible for Shortened Dose intervals:
  - Long-Term Care Home, Retirement Home, Advanced Age: Community Dwelling, Indigenous Community individuals
  - 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
- Users will receive an error if a client has the "Other Priority Population" Reason for Immunization tagged to their profile. To reconcile this, users must tag the client to "Age Eligible Population" and proceed.

4A. Gather Additional Client Information

Description:
Once the client is checked-in, review/update any missing information on the client record and ensure they are tagged to the correct Vaccination Event. Refer to the client record best practices in "**Appendix B: Client Record Best Practices**" to ensure all of the pertinent information is captured.

How:
1. On the client record, ensure the client is checked in status.
2. Using the pencil icon, enter additional important information if required
3. Ensure that the client's Vaccination Event (VE) has been populated accurately. Use the pencil icon to update and search for the relevant VE if needed. If the client's VE is not accurate, the Vaccinator will be unable to successfully administer the dose.

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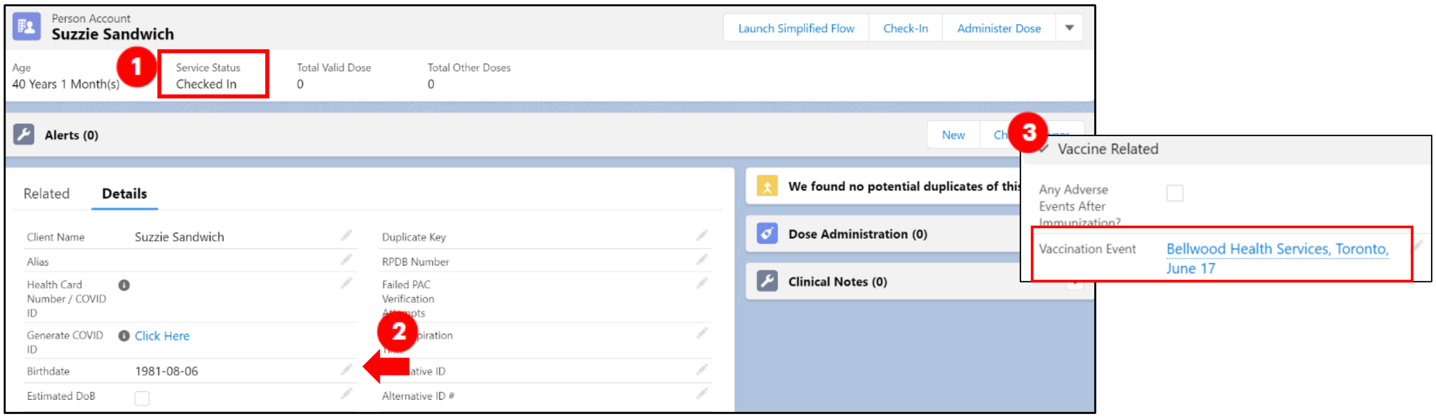
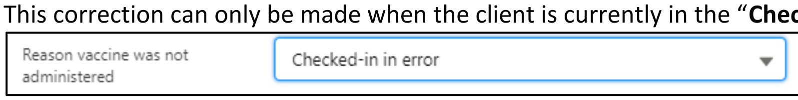


Further Context

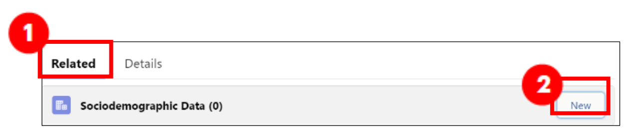
- Upon client record creation or when updating client record details, COVax$_{ON}$ will automatically check/uncheck the "**Follow-up Communication**" consent checkboxes based on adding or removing phone number or email information when the client record was created.
- The email added to the client record can be the email of a substitute decision maker (for example, a relative or caretaker).
- If a client is checked-in by error, the user can revert the check-in process. To do this, locate the "**Reason vaccine was not administered**" field on the client record. Select the dropdown option: "**Checked-in in error**", then save the client record. This process will return new clients to the status "**New**" and clients who have received a dose to the status, "**Checked Out**." The same dropdown option can also be selected from the Administer Dose screen, before saving the dose administration. Note: This correction can only be made when the client is currently in the "**Checked-in**" status.



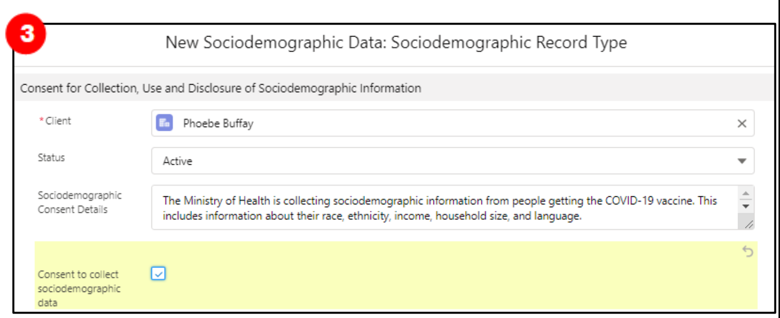
4B. Gather Sociodemographic Information

Description:
Once the client is checked in, ask the client if they consent to providing their Sociodemographic information. Use the following steps to populate data on the client record.

How:



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:



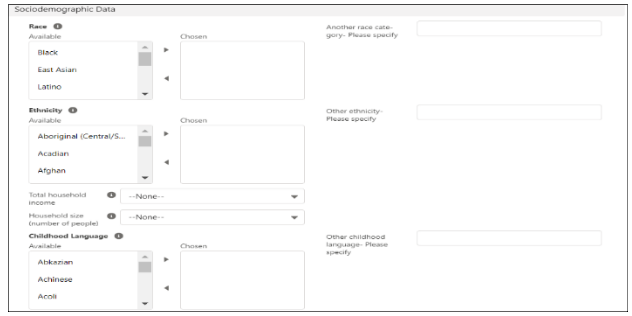
- **Client:** Auto-populated based on the client record selected
- **Status:** From the dropdown field, select the appropriate status:
    - **"Active"** – (defaulted option) select this status when creating a new sociodemographic data record

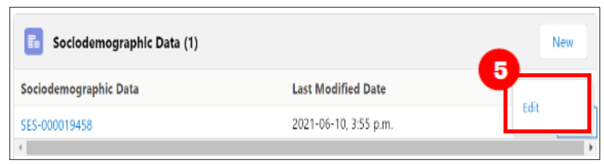
Check In Job Aid

- "**Duplicate/Merged-Obsolete**" – a user cannot merge two duplicate client records if each client has an "Active" sociodemographic record. Therefore, one of the duplicate client's sociodemographic record's status must be changed to "Duplicate/Merged-Obsolete" to successfully complete the client record merge. Refer to the "Edit Dose Admin Records & Merge Duplicate Clients" job aid for more details.
- **"Entered in Error"-** if a Sociodemographic record was mistakenly entered, change the status to "Entered in Error". Proceed to create a new sociodemographic data record.

- **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.
5. Users can edit the Sociodemographic record by clicking the drop down and "**Edit**".





Further Context

- *Clients are only able to have one active sociodemographic record on their client record and once a sociodemographic record is created, it cannot be deleted.* Therefore, if a sociodemographic record needs to be replaced, update the status of the record to "Duplicate/Merged-Obsolete" or "Entered in Error". Once a record is tagged to one of those 2 options, the records will be locked and no longer editable by users. The user can then create a new "Active" sociodemographic record if required.

Appendix A: Offline Document Process

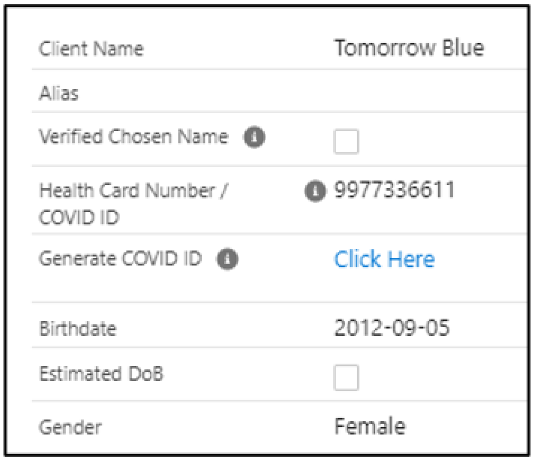
Description:
There are 4 situations whereby data cannot be captured in COVaxON and offline word document forms (*COVaxON Vaccine Data Entry & Manual Receipt Form)* must be used to capture the client's vaccination information:

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 site. There is a dedicated contact per location that has access to the SharePoint and can disseminate the documents.

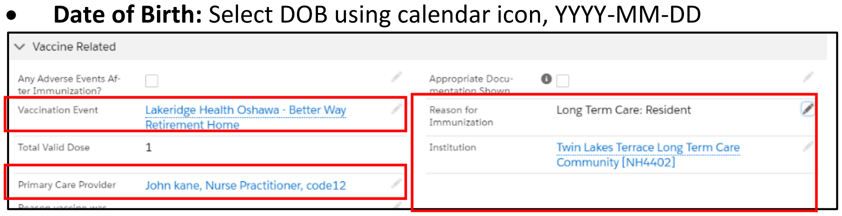
Appendix B: Client Record Best Practices

Description:
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:

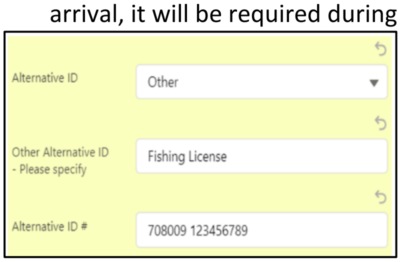
- **Last Name:** The first name is not required, but should be entered
- **Gender:** Select a gender from the drop-down options available
- **Date of Birth:** Select DOB using calendar icon, YYYY-MM-DD



Entering Client's Chosen Name
A "Verified Chosen Name," field is to indicate that a client's chosen name(s) has been verified before entering the chosen name in the existing COVax name fields.
Users can enable the checkbox to allow the client's chosen name(s) to be displayed on their vaccine certificate.

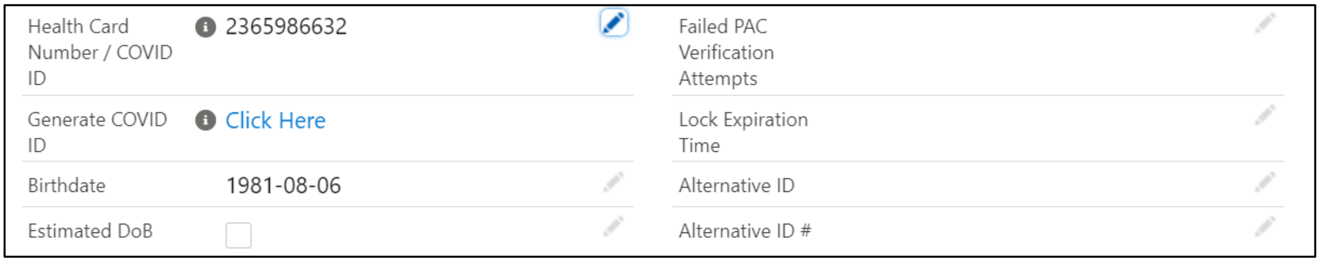
Reason for Immunization: This field should be populated on the client record. If it is not initially populated on the client record upon arrival, it will be required during the check-in process. This is a mandatory field, and the most accurate value should be selected. If the Reason for Immunization is set to Congregate Living, Long Term Care, Retirement Home, or Child and Youth Eligible Population, the Institution field below will become mandatory (see Institution field details below).

- **Vaccination Event:** 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. Populate based on where the client is physically receiving the vaccine.

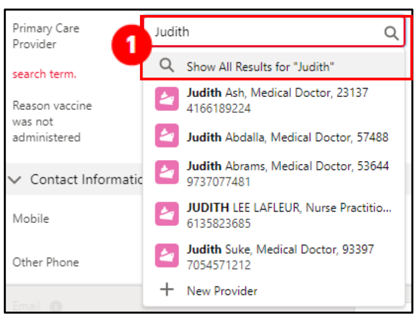


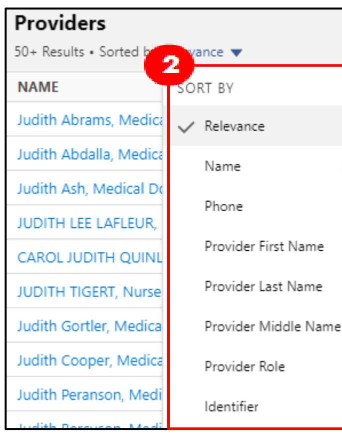
Highly Encouraged Fields:

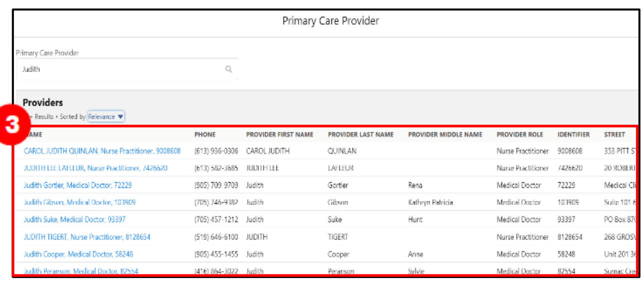
- **Health Card Number / COVID ID (10-digits only):** Best unique identifier to prevent duplicate clients in COVaxON. If a client does not have an HCN, request an "Alternative ID" to be provided (i.e., drivers' licence, passport, birth certificate, etc.). If the "Alternative ID" field is populated with "Other", then the "Other Alternative ID - please specify" field should be populated using free text. In addition, a COVID ID can be documented in this field if it was generated by select PHU users with the "Customer Service Agent COVID ID" permission set
- **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



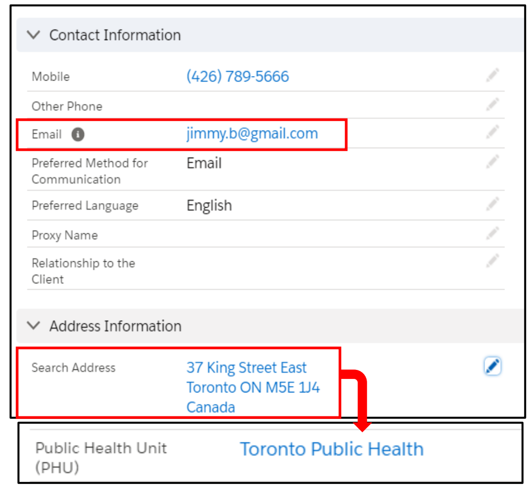
- **Primary Care Provider:** Identify the client's Primary Care Provider (PCP) using the search bar. PCP's can be searched in COVaxON by a variety of criteria (first, middle, last names, phone number, etc.) To search PCP's:
    1. On the client record, begin typing the providers identifier (for example, the PCP's first or last name) into the search bar, then select "**Show all results for [identifier]**", and a second window will appear.
    2. From the new window, click on the dropdown menu to "Sort By" the preferred identifier (this is optional).
    3. Identify the correct provider and click on the hyperlink under the "**Name**" column to add them to the client record. Click **"Save"** on the client record.







- **Institution:** If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or **"**Child and Youth Eligible Population**"**, the institution field will become mandatory. For all other Reason for Immunization values selected, the Institution field is optional.
- If the institution is not found on the existing list, the user can choose an appropriate value from one of the picklist values below:



Institution ID	Institution Name
SC0001	Home School
SC0002	Not in School
SC0003	School: Unlisted
SC0004	Post-Secondary School

- When the user selects RIM as "Child and Youth Eligible Population," the institution becomes mandatory. The user can search the list by typing the childcare services' name based on Home Child Care Agency or Licensed Child Care Center and it display available records for selection. If the childcare services record is unlisted, the user can choose the following from the picklist values:

Institution ID	Institution Name
LCC0001	LCC0001 - Unlisted: Licensed Child Care Center
HCC0001	HCC0001 - Unlisted: Home Child Care Agency

- **RIM Youth 12+:** client records with RIM value Youth 12+ will be mapped to "Child and Youth Eligible Population"
- **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**" should be 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

Further Context

- 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
- 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:
    1. Congregate Living: Unknown (Historical)
    2. Long Term Care: Unknown (Historical)
    3. Retirement Home: Unknown (Historical)

Appendix C: Extra Dose Documentation

Description:
Based on provincial guidelines, extra doses of the COVID-19 vaccine can be administered to select clients. The term "extra dose" refers to any dose of a COVID-19 vaccine that is administered in addition to the two previous COVID-19 vaccine doses that a client has received. This means that a client has received an extra dose(s) if they receive 3 or more doses of the same COVID-19 vaccine product. They also have received an extra dose(s) if they have received 3 or more of a combination of COVID-19 vaccines (since certain COVID-19 products have been administered interchangeably).

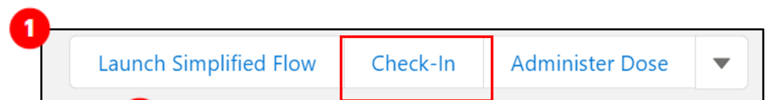
Current Eligibility:
As of August 18, 2021, groups eligible for a third dose include:

- Individuals who are recipients of, undergoing or imminently starting:
  - Transplants (including solid organ transplant and hematopoietic stem cell transplants)
  - An anti-CD20 agent (e.g. rituximab, ocrelizumab, ofatumumab)
  - Stable, active treatment (chemotherapy, targeted therapies, immunotherapy) for malignant hematologic disorders
- Residents of Long-Term Care Homes, High-Risk Retirement Homes and Elder Care Lodges

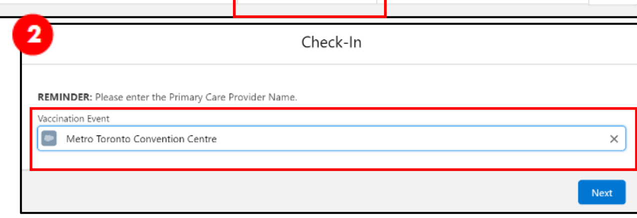
How to record Extra Doses through the Regular Flow process

Extra Doses are recorded in the same way as dose 1 and dose 2. To record an extra dose from the client record:

1. Ensure the client is in the status "**Checked Out**" and click on the "**Check-In**" button on the top right-hand side of the client record



2. During Check-In, verify that the appropriate VE is selected (based off the physical location/site the client is receiving the dose at). If needed, click on the "x" to update the clients VE, then search for and select the appropriate VE

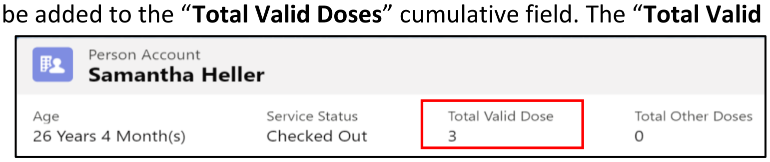


3. Follow the regular process to check- in, administer dose and check out the client

- Based off eligibility as of August 18th, 2021, the following three "**Reason for Immunization**" values can be used for extra dose administration.

#	Reason for Immunization	Definition
1	Long Term Care: Resident	An individual whose primary residence is in a long-term care home including First Nations Elder Care Home.
2	Retirement Home: Resident	An individual whose primary residence is in a retirement home.
3	Person with Priority Health Condition**(confirm with policy)	An individual with a health condition that places them at an increased risk of severe outcomes from COVID-19. For a list of health conditions see COVID-19: Guidance for Prioritization of Phase 2 Populations for COVID-19 Vaccination

4. Once the extra dose is successfully recorded, it will be added to the "**Total Valid Doses**" 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").

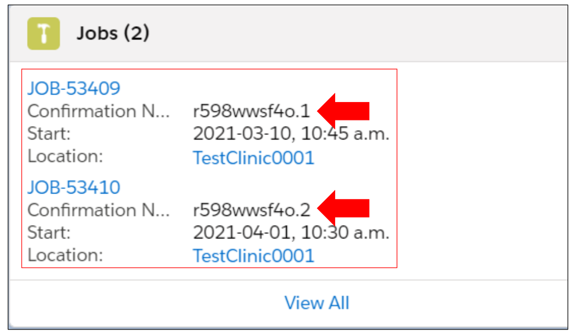


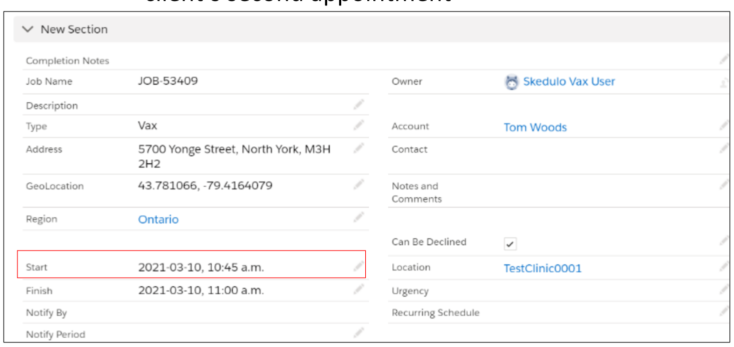
Appendix D: Verifying Appointment Confirmation Numbers

Description:
For clients who have scheduled their appointments using the province-wide booking system, you must verify that they have successfully booked their appointment before checking them into COVaxON. To verify this, you will have to locate a confirmation code on the client's record.

How:
From the client record, navigate to the "Related" tab and see the "**Jobs**" section. A "**Job**" is the term used for a booked appointment in COVaxON.

1. All clients who have booked their appointments will have 2 Job records on their client record. Therefore, if there is no Job associated to the client's record, they have not scheduled.
2. Each Job record will include a Confirmation Number.
    a. In most instances, the number that ends in "**.1**" indicates the client's first appointment
    b. In most instances, the number that ends in "**.2**" indicates the client's second appointment





Note: Appointments can also be confirmed by ensuring that the date/time of the appointment are aligned with the client's arrival date/time.

3. Click into the relevant Job record (either dose 1 or dose 2) to view the appointment details. If the client is early or late for their appointment, follow location procedures to determine if the client can still be admitted for their appointment or reschedule for another time.

Note: It is important to ensure that the client's VE matches the VE they have arrived at. When clients use the booking system to schedule their appointments, they may have chosen the wrong VE or the wrong day by mistake.

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