

COVax_{ON} Simplified Vaccination Event Flow

Your Profile: COVax_{ON} Vaccinator, Site Super User

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

Simplified Flow Activities

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

#	Section	Description
1	Search for or create a client record	A. Search client using their HCN B. If client cannot be found using HCN, search for the client using alternative parameters. If their record is still not found, begin creating a client record
2	Enter additional details on client record	Enter in additional details on the client record
3	Entering Client Alerts	Vaccinators, Site Staff and Site Super Users can enter an alert on a client's record to document any important details related to the client that would be helpful for when the client returns
4	Check-in the client	Proceed to check the client in by documenting their COVID-19 assessment, and recording consent for data collection & research communications
5	Select the vaccine type	Vaccinator selects which vaccine will be administered to the client for the dose they will be receiving
6	Conduct pre-screening assessment	Begin the pre-screening assessment and determine whether it is safe for the client to receive the vaccine
7	Record consent & enter dose admin details	Obtain & record client consent for service and specific dosage information
8	Client Check Out & Document Potential AEFI	Check out the client and direct them to monitor for AEFI. Once the 15-minutes has elapsed for AEFI monitoring, Users can locate the client's record in COVax _{ON} and document AEFI if needed
9	Proof of Vaccination Receipt	<ul style="list-style-type: none"> Option 1: Email a Copy of the Immunization Receipt Option 2: Print a PDF of the Immunization Receipt
10	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 dose administration receipt
12	Add Clinical Notes to the Client Record	Add clinical notes directly to the client record (if needed)
13	Dose Record Under Investigation	Dose record under investigation for suspicion of fraud
14	Appendix A: Offline Document Process	Description of offline document process that can be used when COVax _{ON} is inaccessible, or the client does not consent to data collection
15	Appendix B: Client Record Best Practices	Description of the mandatory and highly encouraged fields on the client record
16	Appendix C: Extra Dose Documentation	Process of tracking "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

Additional 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.

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- Refer to the “**Edit Dose Admin Records & Merge Duplicate Clients**” job aid for information on historical data entry, editing dose administration records (& re-printing/re-emailing receipts), or merging duplicate client records.
- Refer to the “**Check In**” job aid, “**Vaccine Admin**” job aid, and “**Check Out**” job aid when multiple users are performing these functions.

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

Module 1: Checking in the Client

1. Search for or Create a Client Record

Description:

Upon client arrival, open the appropriate Vaccination Event record and launch the Simplified Flow functionality. Ask the client for their Health Card Number (or other identification information if they do not have an HCN) to locate their record in COVaxON. The process below will be followed for all clients.

How:

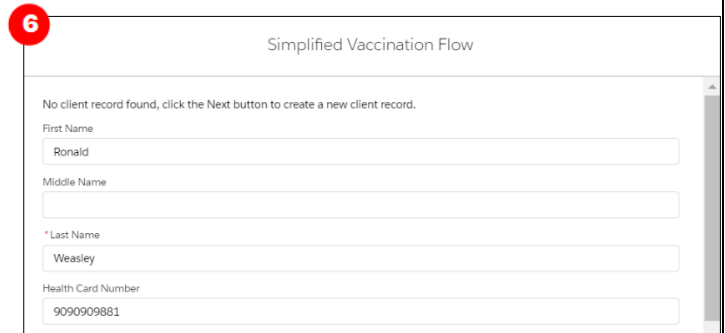
1. On the appropriate Vaccination Event record, select “**Simplified Vaccination Flow**”
2. If the client has a health card, enter their HCN and click “**Next**”. If the client does not have a health card, leave the field blank and click “**Next**”
3. If searched by HCN and the client record is found, select the Client Name hyperlink to open the client record. Proceed to Section 2 below.
4. If the HCN search returns no results or the client did not have a HCN, populate other client data on the second pop-up window for searching (the client’s First Name, Last Name and one of: 1) Date of Birth or 2) Postal Code must be searched)
5. If a client is found, click on their name hyperlink to open their record, and proceed to Section 2 below. If a client is still not found, toggle the bar to “**Active**” to enable client creation (through the Provincial Registry search or manual creation) and click “**Next**”.
6. If an HCN was entered, it will search the Provincial Registry. A client creation screen containing their information will populate. If an HCN was not entered, the client creation screen will be empty, and the client details should be populated:

The screenshots illustrate the following steps:

1. A button labeled "Simplified Vaccination Flow" is highlighted with a red box and the number 1.
2. A "Client Search" form is shown with a "Health Card Number" input field and a "Next" button. A red circle with the number 2 is next to the "Next" button.
3. A "Simplified Vaccination Flow" window shows search results for "Celia Rogers" with "Checked Out" status. A red box highlights the client name and status, with a red circle and the number 3 next to it.
4. A "Client Search" form is shown with fields for "Enter First Name" (Ronald), "Enter Last Name" (Wesley), "Enter DOB" (Mar 20, 1967), and "Enter Postal Code". A red circle with the number 4 is next to the "Next" button.
5. A "Client Search" form is shown with a message "No client record found, or client is inactive in COVax." and a toggle switch for "Provincial Registry search" set to "Inactive". A red circle with the number 5 is next to the "Next" button.

- Required Fields: Last Name (First Name is not required, but should be entered), Gender, Date of Birth
 - Highly Encouraged Fields: Health card number (see “Appendix B: Client Record Best Practices” for more information on the client record)
7. Review the information and make any required updates to the client details and click “**Next**”.
 8. Click the link shown in the pop-up window to open the client record in another browser tab
 9. Click “**Finish**”

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



Simplified Vaccination Flow

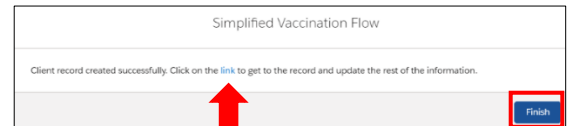
No client record found, click the Next button to create a new client record.

First Name
Ronald

Middle Name

* Last Name
Weasley

Health Card Number
9090909881



Simplified Vaccination Flow

Client record created successfully. Click on the [link](#) to get to the record and update the rest of the information.

Finish

Further Context

- If the client is in the status “**Inactive**” users will not be able to find their record through the simplified flow. To modify this, users must locate the client’s record within COVaxON (likely using the client search tab), then uncheck the “**Inactive**” box on the client’s record to continue through the Simplified Flow.

2. Enter Additional Details on Client Record

Description:

Once the client record has been found or created, populate the record with client contact details and sociodemographic information. Refer to “**Appendix B: Client Record Best Practices**” below for further details on the client record best practices.

Client Record Information

1. Validate the client record information – Name, Gender, Date of Birth, Health Card Number and Vaccination Event. If the client does not have an HCN, request an “Alternative ID” to be provided (i.e. drivers’ licence, passport, birth certificate, etc.).
2. Search and select the client’s “Primary Care Provider” (see Appendix B below for further details)
3. Select the “Reason for Immunization” from the dropdown options available (use the most accurate value - do not default to “Other Priority Population”). If the “Reason for Immunization” field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or “Child and Youth Eligible Population”, the “Institution” field for that client will become mandatory. For all other Reason for Immunization values selected, the Institution field is optional. (See “Appendix B below for further details).
4. If the client is identified as “Indigenous”, select the relevant option using the drop-down list.
5. From the Client’s record, enter in contact information for the client (such as email/phone number(s)).
6. Indicate the client’s “Preferred Method of Communication”. If the client provides a phone number/email address, the relevant consent boxes will be populated.
7. If provided, enter the client’s address in the “Address Information” field. The address should be entered into the “Search Address” bar, which will identify the address from Google maps and auto-populate the remaining fields once selected. Once the client’s postal code is populated, the associated PHU will be auto populated. If the PHU is mapped incorrectly, manually modify the PHU field. If the postal code is deleted from the client record, the PHU remains on the record.

Follow-up Communication by Email <input checked="" type="checkbox"/>	Follow-up Communication by Text/SMS <input type="checkbox"/>
Research Communication by Email <input type="checkbox"/>	Research Communication by Text/SMS <input type="checkbox"/>

Sociodemographic Information

- 1 Enter Sociodemographic information on the client’s record

1. From the desired client record, click on the “Related” tab
2. Under “Sociodemographic Data” and click “New”

3. Read the “Sociodemographic Consent Details” to the client. If consent is obtained, click on the “Consent to collect sociodemographic data” checkbox and populate following fields:
 - **Client:** Auto-populated based on the client record selected
 - **Status:** From the dropdown field, select the appropriate status:
 - “Active” – (defaulted option) select this status when creating a new sociodemographic data record
 - “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 record*, and any additional records must be tagged as “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.

3A. Entering Client Alerts

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

How:

1. From the client’s record, in the **“Alerts”** section, Click **“New”**

2. Select alert type being created:

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

3. Populate alert fields:

- **Alert Name*:** Enter the Alert Type, followed by a description. (i.e. “Warning: Fear of Needles” or “Eligible for Shortened Interval”). See further context section below for eligibility.
- **Comments:** Any additional comments about the situation. For Shortened Interval clients, “Shorten 2nd Dose Interval – 28 days – [Reason]” (i.e. Highest Risk, Indigenous Community, etc.)

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- **Client:** Auto populated from the client record and should not be updated
 - **Start Date*:** Date the alert is being entered. This auto populates to the day the alert is being entered
 - **End Date:** Leave blank
 - **Status:** Input “Active” when initially creating the alert
4. Click “Save”

Further Context

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

4. Check-in the Client

Description:

Proceed with checking in the client for their dose administration. Access the “**Launch Simplified Flow**” directly from the client’s record.

How:

1. From the client record, add or review any alerts. Use the information in the alerts to determine if the client is eligible for check in.
2. From the client record, navigate to the right-hand corner of the screen and click “**Launch Simplified Flow**” to begin checking in the client using the Simplified Flow.
3. 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.

The screenshot shows the 'Vaccine Management' interface. At the top, there are navigation tabs: 'Vaccine Management', 'Client Search', 'Clients', 'Inventory', 'Inventory Transfers', 'Shipment', 'Dashboards', and 'More'. Below this, the client's profile is displayed for 'Rebecca Myers', including 'Age: 30 Years 2 Month(s)', 'Service Status: Checked In', 'Total Valid Dose: 0', and 'Total Other Doses: 1'. There are buttons for 'Launch Simplified Flow', 'Check-In', and 'Administer Dose'. Below the profile, there is an 'Alerts (1)' section with a table containing one alert: 'Feels Faint' (Warning) with a comment 'Feels faint from needles' and a start date of '2021-08-15'. A 'View All' link is at the bottom right of the alerts table.

The screenshot shows the 'Launch Simplified Flow' screen. At the top, it says 'Launch Simplified Flow'. Below that, there is a red circle with the number '3' and a red circle with the letter 'a' next to a 'REMINDER: Please enter the Primary Care Provider Name.' message. Below the reminder, there is a 'Vaccination Event' input field with a dropdown menu showing 'Toronto Public Health - Metro Toronto Convention Centre'. At the bottom right, there are 'Previous' and 'Next' buttons.

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”.

4. **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.

5. Read the disclosure statement out loud to the client. You may also find this disclosure statement in the clinical package to print out to be used on-site if needed.

6. Obtain client consent for data collection. If the client does not consent, no further data should be entered in COVaxON and the offline paper process should be followed for vaccination (refer to the “Appendix A: Offline Document Process” for details on the Offline Process)

7. Ensure the COVID-19 assessment has been completed and check the associated box. Users should verbally ask the client if this assessment has been completed. This is a mandatory checkbox.

8. Obtain the client’s “Consent for Research Communication” by reading the disclosure statement aloud. If the client consents, check either the “Research Communication by Email” or “Research Communication by Text/SMS” box depending on what the client provided.

9. The Reason for Immunization field will show the value that was populated on the client record. If this was not populated on the client record previously, select the relevant option from the dropdown. This is a mandatory field and when entered during check in gets populated on the client record. If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or “Child and Youth Eligible Population”, the Institution field will become mandatory. For all other Reason for Immunization values selected, the Institution field is optional.

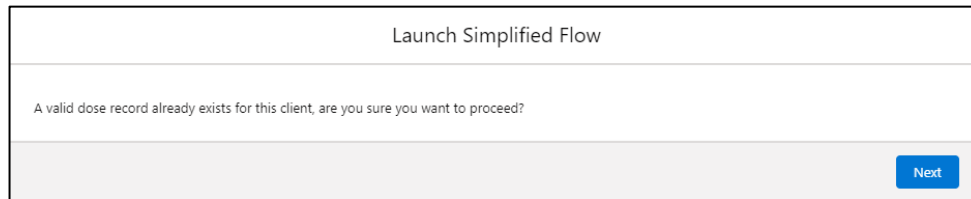
10. Click “Next”

Further Context

- Clients can also be searched from the “Clients” section of the Vaccination Event (by navigating to the “Related” tab and selecting “View All” and applying filters). This is a useful consolidated view of all clients at the VE.

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- If a dose administration record has already been created for a client in the last 24 hours, the following error message will appear when attempting to check-in the client again. Refer to the “**Edit Dose Admin Records & Merge Duplicate Clients**” job aid for more details.



Launch Simplified Flow

A valid dose record already exists for this client, are you sure you want to proceed?

Next

- The minimum interval between doses is calculated based on the client’s last administered dose in status “**Administered**”, “**Invalid**” or “**Inventory Recalled**”. This is because when a client’s dose administration (DA) record status is changed to “**Invalid**” or “**Inventory Recalled**”, the client did in fact receive the dose. However, they will require another dose if for example the dose was incorrectly administered (i.e. dose was invalid because the client received another vaccination too close to the COVID-19 vaccination), or the inventory was deemed not to be fully effective (i.e. inventory recalled).
- As consent is gathered during check-in, this information will be saved and reflected on the client record at the bottom of the screen
- If a client has the “**Inactive**” checkbox populated on their record, users will receive an error when attempting to check in a client. The user must remove the “**Inactive**” checkbox from the client record to proceed with check in. See the “**Edit Dose Admin Records & Merge Duplicate Clients**” for details on this process.

Module 2 : Administer the Vaccination

6. Select the Vaccine Type

Description:

Select which vaccine product will be administered to the client.

How:

- Select the proper vaccine to administer to the client
 - The vaccine inventory that is available at the Vaccination Event will be available for selection from the drop-down. If you do not see values here, this indicates that there is no inventory linked to the VE.
 - If you are administering another dose, you will receive a pop-up with the previous dose information. Review this information to ensure the client is eligible to proceed with their next dose.
- Note:** Clients with the “Reason for Immunization” as “Child and Youth Eligible Population” (ages 5+) should receive the Pfizer vaccine product. If a non-Pfizer product is selected the user will receive a warning message as other vaccine products have not been approved for youth clients. If the Vaccinator chooses to bypass this warning message, they must check the “Administer Dose Outside of Clinical Guidelines” box and populate the “Reason” field with a description. The Vaccinator can click “Next” and continue with the pre-screening assessment. This information will be saved on the client’s dose administration record and can only be edited by Site Super Users and Vaccinators.
- After selecting the vaccine product for the dose the client will be receiving, click “Next”.

The image displays three sequential screenshots of the COVaxON interface:

- First Dose:** A form titled "First Dose" with a "Launch Simplified Flow" button. A red circle with the number "1" is next to the "Select Vaccine" dropdown menu, which currently shows "MODERNA COVID-19 mRNA-1273 0.5 ml - 0001, 2021-04-26".
- Next Dose:** A form titled "Next Dose" with a "Launch Simplified Flow" button. It displays previous dose information: "Previous Dose Administered : 2021-08-15, 4:43 p.m.", "Vaccine Administered : MODERNA COVID-19 mRNA-1273", and "Anatomical Site : Left deltoid / deltoïde gauche". The "Days Since Previous Dose : 0" is shown. A red box highlights the "Select Vaccine" dropdown menu, which is currently set to "Please select".
- Administer Dose:** A form titled "Administer Dose" showing a 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." Below the warning, there is a checked checkbox for "Administer Dose Outside of Clinical Guidelines" and a text input field for "Reason".

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 naming convention for each vaccine/diluent is consistent and reflects of the information on the physical labels. For example:
 - Pfizer – “PFIZER-BIONTECH COVID-19 VACCINE mRNA”
 - Moderna – “MODERNA COVID-19 mRNA-1273”
 - AstraZeneca – “ASTRAZENECA COVID-19 VACCINE”
 - COVISHIELD – “COVID-19 COVISHIELD”
 - Janssen – “JANSSEN COVID-19 VACCINE”
- There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, client status and other client information. To view this report, go to the VE record you are interested in, scroll down to the “Report Links” section, and select the “Showing Clients for Vaccination Event” report.
- Vaccinators must ensure that the appropriate number of days have elapsed between doses. The minimum product intervals for each vaccine type are:

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- Pfizer = at least 19 days from the previous dose
- Moderna = at least 21 days from the previous dose
- COVISHIELD/AstraZeneca = at least 28 days from the previous dose
- JANSSEN = A single dose vaccine, no minimum client interval
- Based on provincial guidelines, the AstraZeneca and COVISHIELD vaccines are paused for first dose administration in Ontario. An error message will appear if a user tries to administer a first dose to a client.

Launch Simplified Flow

First dose administration of Astra Zeneca/COVISHIELD vaccine has been paused in Ontario.

Previous
Next

7. Conduct Pre-Screening Assessment

Description:

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

How:

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

1 Launch Simplified Flow

PFIZER-BIONTECH COVID-19 VACCINE mRNA Pre-Screening Assessment

Have you been diagnosed with myocarditis or pericarditis following the first dose of an mRNA COVID-19 vaccine?

The second dose in the mRNA COVID-19 vaccination series (Pfizer-BioNTech COVID-19 vaccine or Moderna COVID-19 vaccine) should be deferred in clients who experienced myocarditis or pericarditis following the first dose of an mRNA COVID-19 vaccine.

If the individual answers yes to any of the pre-screening questions, document details in the comments box below.

Have you been sick in the past few days? Do you have symptoms of COVID-19 or have a fever today?

Have you had a serious allergic reaction or a reaction within 4 hours to the COVID-19 vaccine before?

Do you have allergies to polyethylene glycol, tromethamine (Moderna only) or polysorbate?

Have you had a serious allergic reaction to a vaccine or medication given by injection (e.g., IV, IM), needing medical care?

Have you received a vaccine in the past 14 days?

Do you have a weakened immune system or are you taking any medications that can weaken your immune system (e.g., high dose steroids, chemotherapy)?

If yes, are you receiving stem cell therapy, CAR-T therapy, chemotherapy, immune checkpoint inhibitors, monoclonal antibodies or other targeted agents?

If on one of the therapies listed: Have you spoken with your treating health care provider about getting the vaccine?

Do you have a bleeding disorder or are you taking blood thinning medications?

Have you ever had a serious allergic reaction to a vaccine or medical procedure?

Pre-screening Assessment Completed

Comments

Previous
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Dose Information

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

I am consenting on the client's behalf and I confirm that I am the client's substitute decision maker (e.g., parent, legal guardian).

***Reason vaccine was not administered**

Select Reason vaccine was not administered

Select Reason vaccine was not administered

Immunization is contraindicated

Practitioner recommends immunization but no PATIENT consent

Practitioner decision to temporarily defer immunization

Medically Ineligible

Patient withdrew consent for series

Checked-in in error

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Notes

- There is a “**Historical Pre-Screening Assessment**” section within the client’s dose administration record that shows responses to any pre-screening checklist questions that were removed based on vaccine guidelines.
- The pre-screening assessments for AstraZeneca, COVISHIELD, and Janssen products have an added warning message 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.

Administer Dose

ASTRAZENECA COVID-19 VACCINE Pre-Screening Assessment

Has the client experienced major venous and/or arterial thrombosis with thrombocytopenia following vaccination with any vaccine?
 Has the client experienced a previous cerebral venous sinus thrombosis (CVST) with thrombocytopenia or a heparin-induced thrombocytopenia (HIT)?
 Has the client experienced a previous episode of capillary leak syndrome?

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

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."

8. Record Consent and Fill in Dose Administration Details

Description:

Obtain and record the client’s consent for service (or consent from a substitute decision maker if the client is Youth 5+), and specific record dosage information in the Dose Information screen. Review the details of the dose for accuracy and complete the dose administration.

How:

1. For the client’s first dose:

- Ask for verbal consent from the client for receiving “**All recommended doses in the series**”.
- 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 5+ years old, *or* clients who are tagged to the Reason for Immunization, “**Youth 5+**” on their client record, there are two consent scenarios (see below)

Message for Non-Youth Client 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.

* Reason vaccine was not administered

Select Reason vaccine was not administered

Previous
Next

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 first dose. Therefore, begin by directly inputting the dosage information
- If the client changes their consent during their second 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.

Reason vaccine was not administered Patient withdrew consent for series

Scenario 1- 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:
 - **“Proxy Name”** – mandatory field
 - **“Proxy Phone”** – optional field
 - **“Relationship to the Client”** – mandatory dropdown field

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

Scenario 2- 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 first 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.

The screenshot shows a form titled "Launch Simplified Flow" with a section for "Dose Information". A checkbox is checked, indicating that the Vaccine Information Sheet has been reviewed and client consent is given. The vaccine is identified as "PFIZER-BIONTECH COVID-19 VACCINE mRNA 0.3 ml - EW0221, 2027-09-01". Below this, several dropdown menus are filled out: "Diluent Event Inventory" is "PFIZER Diluent 0.9% Sodium Chloride 0.2 ml - 26110DK, 2023-02-01"; "Route" is "Intramuscular / intramusculaire"; "Dosage Administered" is "0.3"; "Dosage Unit of Measure" is "ml"; "Anatomical Site" is "Please Select"; "Date and Time" is "Feb 2, 2022" at "10:59 AM"; "Country Vaccine Administered" is "Canada"; "Vaccination Event" is "VE Mila Test AO3"; and "Vaccine Administered By" is "New DH, Dentist, tset". At the bottom right, there are "Previous" and "Next" buttons.

12. Leave this window open and click “Next.”

Note: After administering a dose and clicking the “Finish” button, the inventory level in the COVaxON system will be automatically decremented.

This screenshot shows a summary view of the dose information. It includes a warning: "Please review the dose information entered, once 'Next' button is selected changes can only be made directly in the newly created 'Dose Administration' record." The "Dose Information" section lists: Client: Sheldon Brown; Pre-screening Assessment Completed: true; Vaccine Information Sheet reviewed: true; Vaccine: PFIZER-BIONTECH COVID-19 VACCINE mRNA 0.3 ml - PL1234, 2021-11-11; Diluent: PFIZER Diluent 0.9% Sodium Chloride 0.2 ml - PD1256, 2021-11-11; Date and Time: 2021-08-23, 4:32 p.m.; Route: Intramuscular / intramusculaire; Anatomical Site: Left deltoid / deltoïde gauche; Country Vaccine Administered: Canada; Reason For Immunization: Age Eligible Population; Institution: Toronto Public Health; Authorized Organization: Toronto Public Health; Vaccination Event: Metro Toronto Convention Centre. "Previous" and "Next" buttons are at the bottom.

This screenshot shows a success message: "We have successfully recorded your Dose administration." A "Next" button is located at the bottom right.

Further Context

- 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

- When populating the “Provider” in the “Vaccine Administered By” field, users can search for “Other Clinician, Other Designation, xxx” and select it as a generic placeholder if the Provider’s name cannot be found in the search. This will trigger a second field to become available, “Vaccine Administered By (Other)”. The Vaccinators details should be entered here as: [First Name] [Last Name], [Designation OR Provider Role], [Professional License]. It is highly encouraged to reach out to your Site Lead who can submit a request to the ITS team for this provider to be created in the system. Please have the provider validated by your Site Lead and have the details in the table prepared prior to contacting your site lead:

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

Module 3: Check-Out

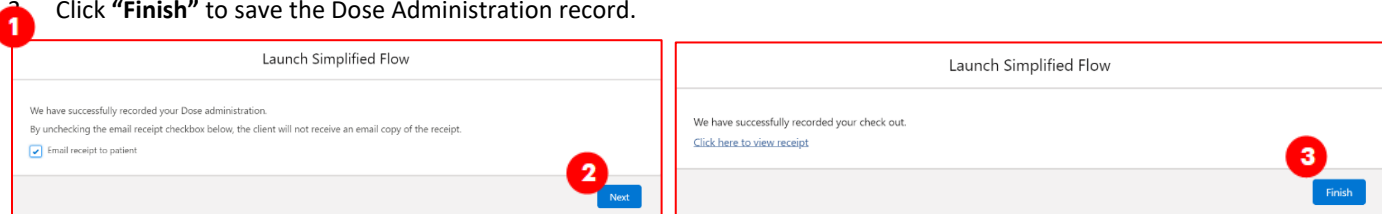
9. Client Check Out & Document Potential AEFI

Description:

The last step in the Simplified Flow process will complete the client’s check out. After check-out, the user must instruct the client to wait for 15 minutes to monitor for any potential Adverse Effects Following Immunization (AEFI). If AEFI occurs, the user can indicate this on the Dose Administration record.

A. Client Check Out:

- If the client provided an email address and would like to receive an email copy of their receipt, leave the checkbox checked. If not, uncheck the “Email receipt to patient” box. See Section 9 “Option 1: Email a Copy of Immunization Receipt” below for more details on obtaining the clients immunization receipt via email.
- Click “Next.” A pop-up will appear confirming the system has recorded the client’s check-out.
- Click “Finish” to save the Dose Administration record.



will move from “New” to “Checked out”

- Once the Simplified Flow is complete, the service status

COVaxON Simplified Vaccination Event Flow

- In COVaxON, there is an option to create an “Alert” for a client on their client record. If the client requires an alert to be logged (i.e. if there is information about an AEFI to be logged, a warning, or the client is eligible for a shortened dose interval), users would populate the details of the alert and save it to the client’s record. Refer to **Section 3** above for instructions on adding alerts.

The screenshot shows a client record for Emma Smith. At the top, there are buttons for 'Launch Simplified Flow', 'Check-In', and 'Administer Dose'. Below this, the client's age is listed as '56 Years 1 Month(s)'. A red box highlights the 'Service Status' field, which is 'Checked Out', and the 'Total Valid Dose' field, which is '2'. Below the client information, there is an 'Alerts (1)' section. A red box highlights the 'New' button. Below the alerts, there is a table with columns for 'Alert Name', 'Record Type', 'Comments', 'Status', 'Start Date', and 'End Date'. One alert is listed: 'Feels Faint' with a 'Warning' record type and the comment 'Client feels faint from needles'.

B. Document AEFI:

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

- Treat the client for the AEFI that occurred.
- From the client record, open the relevant Dose Administration record on the right side of the client record, by selecting the hyperlink.
- If not already on the client record, navigate to the Vaccination Events tab, select the relevant VE, navigate to the “Related” tab and click on “View All” under Dose Administration.
- Apply the relevant filters/sorting – for example, filter by “Client Name.”
- Locate the client’s Dose Administration record and select the hyperlink (for example DA-0677).

The screenshot shows the 'Dose Administration' tab for a vaccination event at 'TDH Metro Toronto Convention Center'. A red box highlights the 'Dose Administration' tab. Below the tab, there is a table with columns for 'Client', 'Status', 'Dose Administration', and 'Time Given'. Two records are listed: 1. Bob Sanders, Administered, DA-0677, 2021-02-18, 8:26 AM. 2. Bob Smith, Administered, DA-0881, 2021-03-09, 7:41 AM. Red boxes highlight the 'Client' column and the 'Dose Administration' column.

- From the Dose Administration record, check off the “Any Adverse Events After Immunization” checkbox

The screenshot shows a checkbox labeled 'Any Adverse Events After Immunization?' which is checked. A red box highlights the checkbox.

10. Proof of Vaccination Receipt

Description:

After the client has been checked out, the proof of vaccination receipt can either be emailed to the client or printed as a PDF on site.

Option 1: Email a Copy of Immunization Receipt

If the client provides their email address and consents to receive an email copy of their vaccination receipt, the email will include a URL link which leads the user to their vaccination receipt on the portal. Note that this URL link replaced the PDF attachment of the vaccination receipt.

How:

During the checkout process:

- Check Out the client as described in **Section 8** above. Ensure the checkbox “Email receipt to patient” is filled in
- Click “Next”. The client will then receive an email with a URL link. The URL link will display as follows:

The screenshot shows a dialog box titled 'Launch Simplified Flow'. It contains the text: 'We have successfully recorded your dose administration. By unchecking the email receipt checkbox below, the client will not receive an email copy of the receipt.' Below this text, there is a checkbox labeled 'Email receipt to patient' which is checked. A red box highlights the checkbox. To the right of the checkbox, there is a red box with the number '1'. Below the dialog box, there is a red box with the number '2' and a 'Next' button.

COVaxON Simplified Vaccination Event Flow

Dear CPPTestSix DoNotChangeSix,

Thank you for doing your part in stopping the spread of COVID-19 and keeping Ontarians Healthy.

[Click here](#) to download or print your COVID-19 vaccination receipt. Please note, this link will expire on **2021-09-13:00:00**

As of September 22, 2021, you will need to provide proof of vaccination to access certain businesses and settings. Please download your vaccine receipt as proof of your vaccine status until an enhanced vaccine certificate with a QR code is available.

How to access your vaccination receipt after the link has expired:

1. If you have a green photo health (OHIP) card, you can log in and get your receipt through the [provincial portal](#) or by calling the Provincial Vaccine Booking Line at 1-833-943-3900.
2. If you have red and white health card or do not have an Ontario health card at all, please call the Provincial Vaccine Booking Line at 1-833-943-3900.

For information on what to expect in the days after vaccination, please refer to the [After Your COVID-19 Vaccine Fact Sheet](#).

Bonjour CPPTestSix DoNotChangeSix,

Merci d'avoir contribué à freiner la propagation de la COVID-19 et à protéger la santé de la population ontarienne.

[Cliquez ici](#) pour télécharger ou imprimer votre récépissé de vaccination contre la COVID-19. Veuillez noter que ce lien expirera le **2021-09-13:00:00**

À partir du 22 septembre 2021, vous devrez fournir une preuve de vaccination pour accéder à certaines entreprises et à certains établissements. Veuillez télécharger votre récépissé de vaccination comme preuve de votre statut vaccinal jusqu'à ce qu'un certificat de vaccination amélioré avec un code QR soit disponible.

Comment accéder à votre récépissé de vaccination après l'expiration du lien:

1. Si vous avez une carte Santé verte avec photo (Assurance-santé de l'Ontario), vous pouvez vous connecter et obtenir votre récépissé par l'intermédiaire du [Portail provincial](#) ou en appelant la Ligne provinciale de prise de rendez-vous pour la vaccination au 1-833-943-3900.
2. Si vous avez une carte Santé rouge et blanc ou si vous n'avez pas du tout de carte Santé de l'Ontario, veuillez appeler la Ligne provinciale de prise de rendez-vous pour la vaccination au 1-833-943-3900.

When a client clicks on their unique URL link, they will be directed to the COVID-19 Patient Portal. From the Portal, they will be required to enter their Health Card number, or their COVID ID (assigned by a PHU), as well as their month of birth. Once successfully logged in, the Vaccination Receipt will be available for download.

The screenshot shows the 'Ontario COVID-19 vaccination' portal in French. The main heading is 'Identity verification for COVID-19 vaccination receipt'. Below this, there is a section titled 'Enter identity information. All fields are required.' with two input fields: 'Identification number' and 'Month of birth'. Below the 'Identification number' field, there is a small text prompt: 'Enter 10 digits of Ontario health card number / red and white health card number / COVID ID'.

Bonjour CPPTestSix DoNotChangeSix,

Merci d'avoir contribué à freiner la propagation de la COVID-19 et à protéger la santé de la population ontarienne.

[Cliquez ici](#) pour télécharger ou imprimer votre récépissé de vaccination contre la COVID-19. Veuillez noter que ce lien expirera le **2021-09-13:00:00**

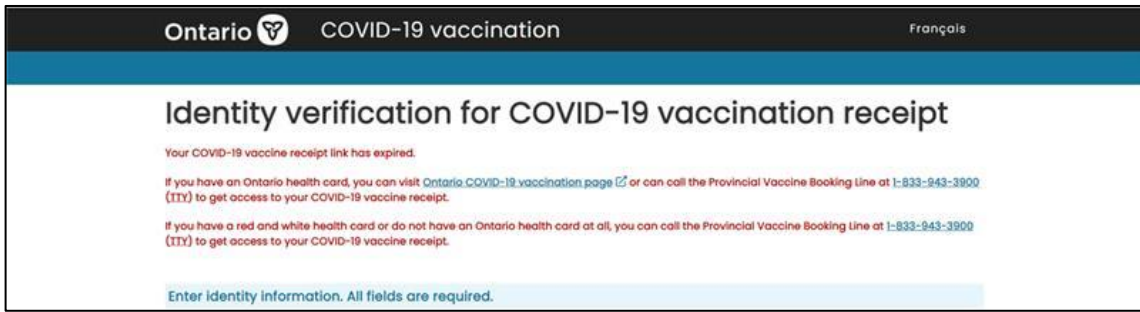
À partir du 22 septembre 2021, vous devrez fournir une preuve de vaccination pour accéder à certaines entreprises et à certains établissements. Veuillez télécharger votre récépissé de vaccination comme preuve de votre statut vaccinal jusqu'à ce qu'un certificat de vaccination amélioré avec un code QR soit disponible.

Comment accéder à votre récépissé de vaccination après l'expiration du lien:

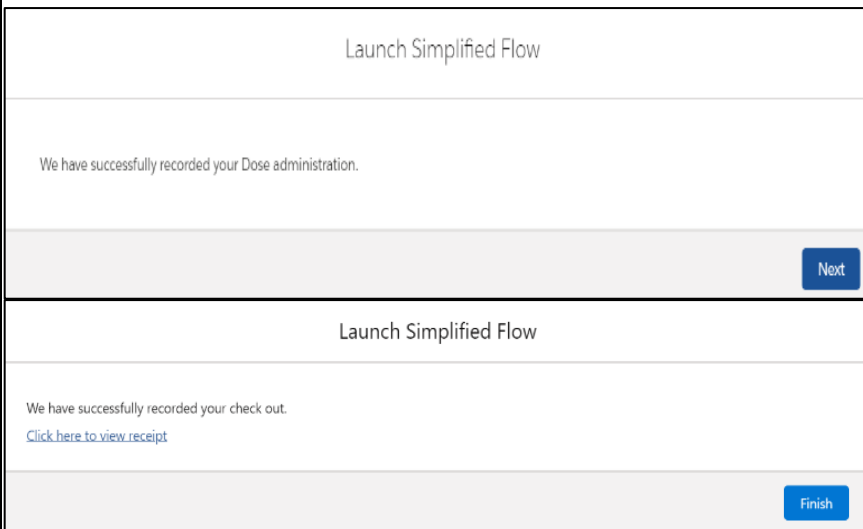
1. Si vous avez une carte Santé verte avec photo (Assurance-santé de l'Ontario), vous pouvez vous connecter et obtenir votre récépissé par l'intermédiaire du [Portail provincial](#) ou en appelant la Ligne provinciale de prise de rendez-vous pour la vaccination au 1-833-943-3900.
2. Si vous avez une carte Santé rouge et blanc ou si vous n'avez pas du tout de carte Santé de l'Ontario, veuillez appeler la Ligne provinciale de prise de rendez-vous pour la vaccination au 1-833-943-3900.

The URL will expire in 5 days from the time the client received their vaccine receipt email. Once the URL is expired:

- Clients with a green photo health (OHIP) card can log in and get their receipts through the Patient Portal or by calling the Provincial Vaccine Booking Line
- Clients with a red and white health card or clients who do not have an Ontario health card, can call the Provincial Vaccine Booking Line, and ask them to resend the vaccine receipt email



If a client is missing one of the following: HCN, COVID ID or birthdate, on their client record in COVaxON, the client will receive a different email, which will direct the client to contact their PHU. The PHU will update the client record in COVaxON and subsequently, the client will have access to their vaccination receipt via the Patient Portal. This message appears as follows:



Option 2: Print a PDF of the Immunization Receipt

How:

After client checkout:

1. On the "Related" tab of the checked-out client's record, click on the PDF hyperlink under "Files". If the client has had 2 doses administered, ensure you are selecting the correct receipt.
2. The receipt will open, click "Download."
3. The receipt will open in a separate tab.
4. Click the printer icon on the top right of the receipt and select the printer on site from the drop-down menu and click "Print".
5. Provide the client with receipt and relevant discharge information.

COVaxON Simplified Vaccination Event Flow

1 Related Details

Sociodemographic Data (0)

Files (2)

Dose_Admin_Bobby Clark_1629061903879.pdf
Aug 15, 2021 • 21KB • pdf

2

Ontario

Ministry of Health - Vaccine Receipt of Service
Ministère de la Santé - Récépissé de vaccination

Name/Nom: Jimmy Sandler
Health Card Number/Numéro de la carte Santé: #####6183
Date of Birth/Date de naissance: 1997-09-24
Date/Date: 2021-09-27 11:06 a.m.
Agent/Agent: COVID-19_mRNA
Product Name/Nom du produit: MODERNA COVID-19 mRNA-1273
Diluent Product: Not Applicable / Ne s'applique pas
Lot/Lot: L21212
Dose/Dose: 0.5 ml
Route/Route: Intramuscular / intramusculaire
Site/Site: Left deltoid / deltoïde gauche
You have received 1 dose(s) / Vous avez reçu 1 dose(s)
Vaccine Administered By/Vaccin Administré par: SUI T, Registered Nurse
Country Vaccine Administered/Pays d'administration du vaccin: Canada
Authorized Organization/Organisme agréé: Toronto Public Health
To obtain your vaccine certificate, please visit <https://covid19.ontariohealth.ca/> / Pour obtenir votre certificat de vaccination, veuillez visiter le site <https://covid19.ontariohealth.ca/>

Please remain on the premises for the next 15 minutes for observation. You are free to leave the vaccination clinic at: 11:21 AM / Veuillez rester sur place pendant les 15 prochaines minutes aux fins d'observation. Vous pouvez quitter la séance de vaccination à: 11:21 AM

3

Ontario

Ministry of Health - Vaccine Receipt of Service
Ministère de la Santé - Récépissé de vaccination

Name/Nom: Jimmy Sandler
Health Card Number/Numéro de la carte Santé: #####6183
Date of Birth/Date de naissance: 1997-09-24
Date/Date: 2021-09-27 11:06 a.m.
Agent/Agent: COVID-19_mRNA
Product Name/Nom du produit: MODERNA COVID-19 mRNA-1273
Diluent Product: Not Applicable / Ne s'applique pas
Lot/Lot: L21212
Dose/Dose: 0.5 ml
Route/Route: Intramuscular / intramusculaire
Site/Site: Left deltoid / deltoïde gauche
You have received 1 dose(s) / Vous avez reçu 1 dose(s)
Vaccine Administered By/Vaccin Administré par: SUI T, Registered Nurse
Country Vaccine Administered/Pays d'administration du vaccin: Canada
Authorized Organization/Organisme agréé: Toronto Public Health
To obtain your vaccine certificate, please visit <https://covid19.ontariohealth.ca/> / Pour obtenir votre certificat de vaccination, veuillez visiter le site <https://covid19.ontariohealth.ca/>

Please remain on the premises for the next 15 minutes for observation. You are free to leave the vaccination clinic at: 11:21 AM / Veuillez rester sur place pendant les 15 prochaines minutes aux fins d'observation. Vous pouvez quitter la séance de vaccination à: 11:21 AM

Print 1 sheet of paper

Destination: KM Secure Printer

Pages: All

Copies: 1

Color: Black and white

More settings

Print Cancel

Further Context

- The immunization receipt includes a printed URL that the client can use to access an electronic version of their receipt. The URL is listed as follows:
 - English version: To obtain your vaccine certificate, please visit <https://covid19.ontariohealth.ca/>
 - French version: Pour obtenir votre certificat de vaccination, veuillez visiter le site <https://covid19.ontariohealth.ca/>

To obtain your vaccine certificate, please visit <https://covid19.ontariohealth.ca/> / Pour obtenir votre certificat de vaccination, veuillez visiter le site <https://covid19.ontariohealth.ca/>.

Please remain on the premises for the next 15 minutes for observation. You are free to leave the vaccination clinic at: 11:21 AM / Veuillez rester sur place pendant les 15 prochaines minutes aux fins d'observation. Vous pouvez quitter la séance de vaccination à: 11:21 AM.

11. 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 an emailed 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

Proxy Name

Relationship to the Client

Address Information

Search Address

Client Consent Information

Consent for Data Collection

Follow-up Communication by Email

Person Account
Jimmy Sandler

Launch Simplified Flow | Check-in | Administer Dose

Related Details

Client Name: Jimmy Sandler

Health Card Number / COVID ID: 1284726183

Birthdate: 1997-09-24

Gender: Male

Active SES: 0

Vaccine Receipt URL: <https://covax.ppe.ontariohealth.ca/443/receipt-identity?receiptId=2MEAA5XJV9KE8XA2>

Dose Administration (1)

DA-10508657

Time Given: 2021-09-27, 11:06 a.m.

Status: Administered

Record Type: Point Of Service

Clinical Notes (0)

Vaccination Events > TPH Metro Toronto Convention Center

Dose Administration

2 items • Updated a minute ago

Client	Status	Dose Administration	Time Given
1 Bob Sanders	Administered	DA-0677	2021-02-18, 8:26 AM
2 Bob Smith	Administered	DA-0881	2021-03-09, 7:41 AM

Generate Receipt

Email receipt to patient

[Click here to view receipt](#)

Next

Generate Receipt

Thank you !

Finish

12. Add Clinical Notes to Client Record

Description:

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

How:

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

Notes:

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

13. Dose Administration Under Investigation

Description:

A dose record suspected as fraudulent can be investigated and actioned.

How:

1. A new field, "Investigation Status," has been added to the Dose Administration Record. The field is read-only for all profiles except for a profile granted permission as a "Fraud Investigator."

The new field will have the following picklist values:

- Under Review - assigned if a DA record is being reviewed under suspicion of fraud
- Determined Invalid - assigned if the dose record has been deemed invalid due to the outcome of an investigation Dose record will be invalidated.
- Review Completed - assigned if review is completed and not deemed fraudulent

A user with the permission "Fraud Investigator" will have access to edit this field by clicking on the pencil icon (which will be visible to a profile with the fraud investigator permission).

Note:

The new field will be displayed on DA records for Point of Service, Out of Province and Non- Ontario Stock records.

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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> The forms should be used to enter the data into COVaxON by a User with access when it is available The data should be entered in COVaxON retroactively within 72 hours of the vaccination date.
A mobile vaccination team conducting vaccinations at a rural/remote location without connectivity	
A temporary team of staff are conducting vaccinations who are not trained on COVaxON or are not Users of COVaxON	

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

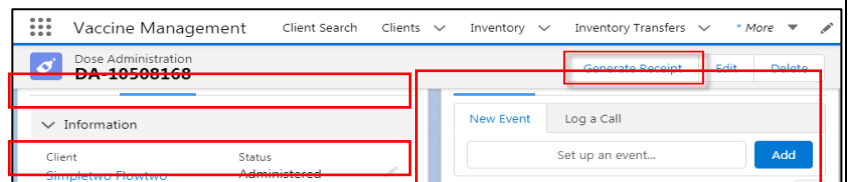
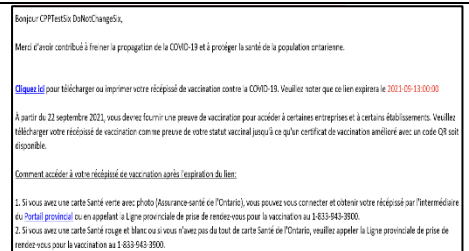
Appendix B: Client Record Best Practices

Description:

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

Required Fields:

- **Last Name:** The first name is not required, but should be entered
- **Gender:** Select a gender from the drop-down options available
- **Date of Birth:** Select DOB using calendar icon, YYYY-MM-DD
- **Reason for Immunization:** This field should be populated on the client record. If it is not initially populated on the client record upon arrival, it will be required during the check-in process. This is a mandatory field and the most accurate value should be selected - do not default to “**Other Priority Population**”. 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.



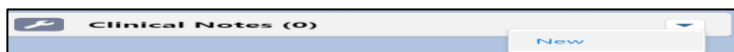
Highly Encouraged Fields:

- **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



COVaxON Simplified Vaccination Event Flow

- 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:
 - 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.
 - From the new window, click on the dropdown menu to **“Sort By”** the preferred identifier (this is optional).
 - Identify the correct provider and click on the hyperlink under **“Name”** to add them to the client record. Click **“Save”** on the client record.



Primary Care Provider

Judith

Search term: Judith

Show All Results for "Judith"

- Judith Ash, Medical Doctor, 23137 4166189224
- Judith Abdalla, Medical Doctor, 57488
- Judith Abrams, Medical Doctor, 53644 9737077481
- JUDITH LEE LAFLEUR, Nurse Practitioner, 6135823685
- Judith Suke, Medical Doctor, 93397 7054571212

+ New Provider

Providers

50+ Results • Sorted by Relevance

NAME SORT BY

- Relevance
- Name
- Phone
- Provider First Name
- Provider Last Name
- Provider Middle Name
- Provider Role
- Identifier

Primary Care Provider

Providers

NAME	PHONE	PROVIDER FIRST NAME	PROVIDER LAST NAME	PROVIDER MIDDLE NAME	PROVIDER ROLE	IDENTIFIER	STREET
CAROL JUDITH QUINLAN, Nurse Practitioner	9058608	905-556-9306	CAROL, JUDITH	QUINLAN	Nurse Practitioner	9058608	353 PITT ST
JUDITH LEE LAFLEUR, Nurse Practitioner	4286620	905-584-3826	JUDITH LEE	LAFLEUR	Nurse Practitioner	4286620	200 RIVER
Judith Sorker, Medical Doctor	72229	905-709-3709	Judith	Sorker	Medical Doctor	72229	Medisp C
Judith Gibson, Medical Doctor	101906	(705) 248-9189	Judith	Gibson	Medical Doctor	101906	Nuite 101
Judith Suke, Medical Doctor	93397	(705) 457-1212	Judith	Suke	Medical Doctor	93397	PO Box 82
JUDITH TIGERT, Nurse Practitioner	8128654	(519) 646-6000	JUDITH	TIGERT	Nurse Practitioner	8128654	266 GROS
Judith Cooper, Medical Doctor	58248	(905) 455-1455	Judith	Cooper	Medical Doctor	58248	Unit 201

- 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 appropriate institution field will become mandatory. For all other Reason for Immunization values selected, the Institution field is optional.
- Contact Details:** With the client’s consent, collect contact information (phone number and/or email address). If the client would like to receive their immunization receipt via email, the email address field must be populated and the **“Preferred Method for Communication”** 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 the record.

Contact Information

Mobile (426) 789-5666

Other Phone

Email jimmy.b@gmail.com

Preferred Method for Communication Email

Preferred Language English

Proxy Name

Relationship to the Client

Address Information

Search Address 37 King Street East
Toronto ON M5E 1J4
Canada

Drug Administration

DA-10505758

Record Type Point Of Service

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:
 - Congregate Living: Unknown (Historical)

- Long Term Care: Unknown (Historical)
- 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

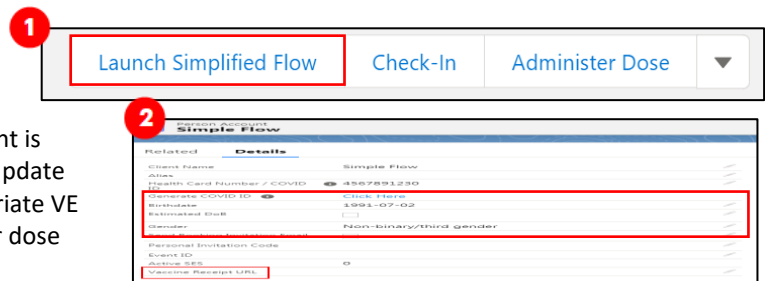
Before receiving an extra dose, the following dose intervals must be met:

- High Risk clients: Must wait a minimum interval of 8 weeks between dose 2 and 3
- Long Term Care Home/Retirement Home clients: Must wait a minimum interval of 5 months between dose 2 and dose 3

How to record Extra Doses through the Simplified 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 “**Launch Simplified Flow**” 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 simplified 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”).

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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