

Check In Job Aid

Your Profile: COVaxON Site Staff

Record client information on the client record and check client into COVaxON.

Client Check-In Activities

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

#	Section	Description
1	Locate Client Record in COVaxON	When client arrives, search for their record in COVaxON by using either the “Client Search” or “Vaccination Events” tabs.
2	Create New Client Record in COVaxON	If the client was not found in COVaxON, create a new client record
3	Verify Appointment Confirmation Number	If the client booked their appointment through the VAB tool, users should verify that their appointment confirmation number in COVaxON
4	Alerts & Client Check-In	Check in the client, requesting data and communication consent
5a	Gather Additional Client Information	Ensure all mandatory fields are populated and add any additional information to the client record
5b	Gather Sociodemographic Information	If consented, gather client sociodemographic information
6	Appendix A: Offline Document Process	Description of offline document process that can be used when COVaxON is inaccessible or a client does not consent to data collection
7	Appendix B: Client Record Best Practices	Description of the mandatory and highly encouraged fields on the client record

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 “**User Profile Set Up**” job aid to learn more about your system access. Refer to the MOH Clinical Package on SharePoint for forms and process information that you might need in addition to this job aid.

Disclaimer

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

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

1. Locate Client Records in COVaxON

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
 - Gender
 - Phone (Home, Mobile, Other)
 - Postal Code
 - Alternative ID: Select an alternate ID type from the dropdown
 - 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**”

Vaccine Management

Client Search Clients Inventory Shipment

Client Search

Enter the Health Card Number (HCN). If Health Card Number is unavailable, click 'Search Client' to search using other parameters.

Health Card Number
1234567890

☐ HCN unavailable

Search Client Create New Client Clear

Client Search Results

Client Name	Client Status	Health card number	Birthdate	Postal Code
Sarah Keen	New	659863323	1971-06-18	

Finish

Vaccination Event

Select an option from the p

lakeridge health

Show All Results for "lakeridge health"

Total Valid Dose

Lakeridge PHU, Lakeridge Health Oshawa, ...
1314g00000001BsAAI

Search Client

Search using the Last Name with the other search parameters.

First Name

*Last Name

Birthdate

Gender
Please select gender

Homephone

Mobile

Other Phone

Postal Code

Alternative ID
Please select an Alternative Id Type

Alternative Id #

Vaccination Event Name

Next

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- If results are produced, click the desired client's name to bring navigate to their record and complete the check-in process.
- If no results are produced, you will be directed to an option to search the Provincial Registry. This is an integration between COVaxON and the Provincial Registry (which contains information of residents registered under OHIP). Click **"Next"** to continue.

- 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 select the **"Previous"** button and modify the HCN if there was a mistake or click **"Finish"** and proceed to **Section 2** below.

- If an exact match is found, a client 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). If you would like to proceed with client creation, select **"Next"** and proceed to **Section 3** below. If you do not wish to proceed with client creation, click the **"x"** on the top right corner of the screen. *Do not click the "Next" button as that will automatically add the client into COVaxON.*
- Click **"Next"**, then **"Finish"**. The client will be added into COVaxON and can be found using the **"Client Search"** tab to be checked in.

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 do not have an HCN, use the following steps:

- Click on the **"Client Search"** tab
- Click on the **"HCN unavailable"** checkbox
- 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.
- 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
- 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 to Section 2 below.

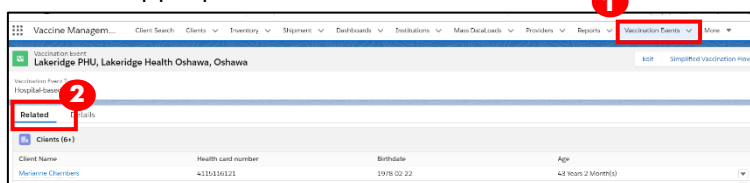
Method B: Search for the client record using the “Vaccination Events” tab

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



Client Name	Health card number	Birthdate	Age
1 Mickey Pleasant	9999999997	1981-08-14	39 Years 8 Month(s)
2 Sierra Riley	9999333456	1994-02-21	27 Years 2 Month(s)
3 Daisy Duke	9998887770	1975-04-11	46 Years 0 Month(s)

5. If your location is utilizing barcode scanners, click within the “**Health Card Number**” field and scan the client’s health card barcode. The information will populate in the selected field. Once populated, click “**Apply**”.

6. If your location is not utilizing barcode scanners, manually enter the relevant information. For example:

- Enter client HCN (recommended parameter to use)
- Enter client name (if they do not have an HCN)
- Filter clients by status (i.e. “Dose 2 Checked In”)

1. 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.)).

2. 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. If results are not produced, try to search using the “**Client Search**” tab. If a search from the **Vaccination Event** and **Client Search** tabs produce no results, proceed to Section 2.

Note: COVaxON 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.

2. Create New Client Record in COVaxON

Description:

If the client cannot be found from the Provincial Registry, this indicates that their record must be created manually. Please refer to the established clinical processes for approving new clients before creating new records in COVaxON. 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.

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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.

1

Enter the Health Card Number (HCN). If Health Card Number is unavailable, click 'Search Client' to search using other parameters.

Health Card Number

☒ HCN unavailable

New Client: Client

Client Name	Salutation --None--	Duplicate Key	<input type="text"/>
	First Name		<input type="text"/>
	Middle Name		<input type="text"/>
	* Last Name		<input type="text"/>
Health card number		RPDI Number	<input type="text"/>
Alternative ID #		Alternative ID	--None--
* Birthdate	<input type="text"/>	Estimated DoB	<input type="checkbox"/>
* Gender	--None--	Public Health Unit (PHU)	Search PHU Masters... <input type="text"/>

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.

Review the errors on this page.

duplicate value found: CCM_PatientId_c duplicates value on record with id: 0011f000008rlfa

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.



The record you're about to create looks like a duplicate. Open an existing record instead? [View Duplicates](#)

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

3. Verify Appointment Confirmation Number

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. The number that ends in ".1" indicates the client's first appointment
 - b. The number that ends in ".2" indicates the client's second appointment
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.

T Jobs (2)

JOB-53409

Confirmation N... r598wwsf4o.1

Start: 2021-03-10, 10:45 a.m.

Location: TestClinic0001

JOB-53410

Confirmation N... r598wwsf4o.2

Start: 2021-04-01, 10:30 a.m.

Location: TestClinic0001

View All

New Section

Completion Notes

Job Name

JOB-53409

Owner

Skedulo Vax User

Description

Vax

Account

Tom Woods

Address

5700 Yonge Street, North York, M3H 2H2

Contact

GeoLocation

43.781066, -79.4164079

Notes and Comments

Region

Ontario

Can Be Declined

☒

Start

2021-03-10, 10:45 a.m.

Location

TestClinic0001

Finish

2021-03-10, 11:00 a.m.

Urgency

Notify By

Recurring Schedule

Notify Period

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.

4. Alerts & Client Check-In

Description: Once the client record has been located and opened in COVaxON, add or review any alerts on the record. Once reviewed, proceed with checking in the client.

Person Account

April Showers

Launch Simplified Flow

Check-In

Administer Dose

Age

75 Years 11 Month(s)

Client Status

New

Product Name

Product Type

Total Valid Dose

0

Total Other Doses

1

New

In Progress

Completed

Alerts (1)

1 item • Updated a minute ago

Alert Name

Record Type

Comments

Status

Start Date

End Date

Eligible for Shortened Interval

Eligible for Shortened Interval

Shorten 2nd Dose Interval - 28 days - Highest Risk

Active

2021-05-19

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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 can bypass the 4-month second dose interval warning message.

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 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 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"**.

The image contains two screenshots of a software interface. The first screenshot, labeled with a red circle and the number 2, shows the 'New Alert' form. It has a section 'Select a record type' with four radio button options: 'Warning', 'AEFI', 'Eligible for Shortened Interval' (which is selected), and 'Highest Risk'. At the bottom are 'Cancel' and 'Next' buttons. The second screenshot, labeled with a red circle and the number 3, shows the 'New Alert: Eligible for Shortened Interval' form. It has a title bar and a form area with fields: 'Alert Name' (containing 'Eligible for Shortened Interval'), 'Comments' (containing 'Shortened 2nd Dose Interval- First Nations'), 'Client' (a dropdown showing 'Elvis Presley'), 'Start Date' (containing '2021-05-13'), 'End Date' (empty), and 'Status' (a dropdown showing 'Active'). The 'Owner' is listed as 'Rebecca Solomon'. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons. A red circle with the number 4 points to the 'Save' button. Below the screenshots, there is a paragraph of text and a final screenshot labeled with a red circle and the number 5. The paragraph states: 'Before check-in, use the alert information to determine if the client is eligible for check in. For example, if a client is eligible to receive their second dose in a shorter time interval, they will be able to check in for their second dose earlier than the 4-month interval. Prior to check-in, it is also important to ensure that the client has completed the COVID-19 Assessment before progressing through the clinic. Once completed, proceed to check the client in.' The final screenshot, labeled with a red circle and the number 5, shows a row of buttons: 'Launch Simplified Flow', 'Check-In', and 'Administer Dose' with a dropdown arrow.

2

3

4

5

Before check-in, use the alert information to determine if the client is eligible for check in. For example, if a client is eligible to receive their second dose in a shorter time interval, they will be able to check in for their second dose earlier than the 4-month interval. Prior to check-in, it is also important to 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. **When checking in Dose 2 clients** (for double dose vaccines only), an information pop-up will appear with details from Dose 1. Review the information (the product that was given for dose 1 and the number of days that have elapsed since their first dose). During check-in for dose 2, the number of days since their previous dose must be reviewed for two reasons:

- 1) Confirm that the minimum interval of days has passed between dose 1 and dose 2 for that vaccine product type (i.e. 21 days have elapsed for Moderna)
- 2) Confirm that the client has waited the 4-month interval extension before receiving dose 2 (Unless they are eligible for a shortened interval). This 4-month extended interval has been recommended by National Advisory Committee on Immunization (NACI).

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

6

Check-In

Dose 1 Information

Product Name: MODERNA COVID-19 mRNA-1273

Date Given: 2021-05-19, 9:21 a.m.

Days Since Dose 1: 0

☒ Eligible for Dose 2

Next

Check-In

Minimum Interval Alert: For the MODERNA COVID-19 mRNA-1273 vaccine, the minimum interval is 21 days from the previous dose.

Previous Next

Extended Dose Interval Alert: NACI recommends that in the context of limited COVID-19 vaccine supply, jurisdictions should maximize the number of individuals benefiting from the first dose of vaccine by extending the interval for the second dose of vaccine up to **four months**.
Exceptions to Extended Dose Intervals: Individuals with immunocompromising conditions and those on immunosuppressive therapies.

7. 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.

8. 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; however, 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)

9. Populate the **"COVID-19 Assessment Completed"** checkbox. This is a mandatory checkbox.

10. 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.

11. 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 - do not default to **"Other Priority Population"** if there is a specific relevant value for the client. Click **"Next"**.

12. Click **"Finish"**.

Check-In

Data Collection Consent

Acknowledgement of Collection, Use and Disclosure of Personal Health Information

The personal health information on this form is being collected for the purpose of providing care to you and creating an immunization record for you, and because it is necessary for the administration of Ontario's COVID-19 vaccination program. This information will be used and disclosed for these purposes, as well as other purposes authorized and required by law. For example,

- It will be disclosed to the Chief Medical Officer of Health and Ontario public health units where the disclosure is necessary for a purpose of the Health Protection and Promotion Act.
- It may be disclosed, as part of your provincial electronic health record, to health care providers who are providing care to you.

The information will be stored in a health record system under the custody and control of the Ministry of Health.

Where a Clinic Site is administered by a hospital, the hospital will collect, use and disclose your information as an agent of the Ministry of Health.

Acknowledgement that the client understands and consents to for data collection, use and disclosure.

☒ Consent for Data Collection

☒ COVID-19 Assessment Completed

Consent for Research Communication

Do you consent to be contacted by researchers about participation in COVID-19 vaccine related research studies? If yes, your personal health information will be used to find studies relevant to you, and your name and contact information will be disclosed to researchers. Consenting to be contacted about studies does not mean you have consented to participate in the research itself. Participating in research is voluntary and will not impact your eligibility to receive the COVID-19 vaccine.

☒ Research Communication by Email

☐ Research Communication by Text/SMS

*Reason For Immunization

Community at Greater Risk

Institution

Search undefined...

*Site Attendee

abby graham

Previous Next

Further Context

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- 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.
- 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.
- 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

5A. 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:

- On the client record, ensure the client is checked in (**"Dose 1 (or 2) checked in"** status).
- Using the pencil icon, enter additional important information if required
- 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 not be able to administer the dose.

The screenshot displays the client record for Bob Banana. Key elements include:

- Client Status:** A red circle labeled '1' highlights the status 'Dose 1 checked in'.
- Client Details:** A red circle labeled '2' highlights the pencil icon used to edit client information.
- Vaccine Related:** A red circle labeled '3' highlights the pencil icon used to edit the Vaccination Event, which is currently set to 'UHN - Greenview Manor'.

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- Upon client record creation or when updating client record details, COVaxON 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.
- If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or **"Youth 12+"**, the Institution field will become mandatory. For all other Reason for Immunization values selected, the Institution field is optional. For additional details on this, refer to **"Appendix B: Client Record Best Practices"**.
- The email added to the client record can be the email of a substitute decision maker (for example, a relative or caretaker).

5B. 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

- **"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



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- **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
- Click “**Save**” to save the information on the client record.
 - Users can edit the Sociodemographic record by clicking the drop down and “**Edit**”. Sociodemographic records cannot be deleted once created.

The screenshot shows the 'Sociodemographic Data' form. It has several sections: 'Race' with a list of options (Black, East Asian, Latino) and a 'Chosen' box; 'Ethnicity' with a list of options (Aboriginal (Central/S...), Acadian, Afghan) and a 'Chosen' box; 'Total household income' with a dropdown menu showing '--None--'; 'Household size (number of people)' with a dropdown menu showing '--None--'; and 'Childhood Language' with a list of options (Abakian, Achinese, Acoli) and a 'Chosen' box. There are also free text fields for 'Another race category- Please specify', 'Other ethnicity- Please specify', and 'Other childhood language- Please specify'.

The screenshot shows a table with one row of data. The first column is 'Sociodemographic Data' with the value 'SES-000019458'. The second column is 'Last Modified Date' with the value '2021-06-10, 3:55 p.m.'. There are 'New' and 'Edit' buttons in the right column. The 'New' button is highlighted with a red box.

Further Context

- Clients are only able to have one active sociodemographic record on their client record and once a sociodemographic record is made, 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.
- New status field will be available in operational reports

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	

Check In Job Aid

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 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 "Youth 12+", the Institution field below will become mandatory (see Institution field details below).

Client Name: Shaunna Graham

Health card number

Alternative ID #

Birthdate: 1938-05-10

Gender: Female

Highly Encouraged Fields:

- **Health Card Number (10-digits only):** Best unique identifier to prevent duplicate clients in COVaxON. If a client does not have an HCN, request an "Alternative ID" to be provided (i.e. drivers' licence, passport, birth certificate, etc.).
- **Vaccination Event:** Populate based on where the client is physically receiving the vaccine.
- **Indigenous:** If the client is identified as Indigenous, indicate the specific status using the drop-down list. If the relevant option is not available from the drop down, select **"Other Indigenous"** and populate the value in the **"Other Indigenous Specify"** field
- **Primary Care Provider:** Identify the client's Primary Care Provider using the search bar.

Vaccine Related

Any Adverse Events After Immunization? ☐

Vaccination Event: Lakeridge Health Oshawa - Better Way Retirement Home

Total Valid Dose: 1

Primary Care Provider: John Kane, Nurse Practitioner, code12

Appropriate Documentation Shown ☐

Reason for Immunization: Long Term Care: Resident

Institution: Twin Lakes Terrace Long Term Care Community [NH4402]

Indigenous: Other Indigenous

Other Indigenous specify:

Please specify other Indigenous:

Reason for Immunization: --None--

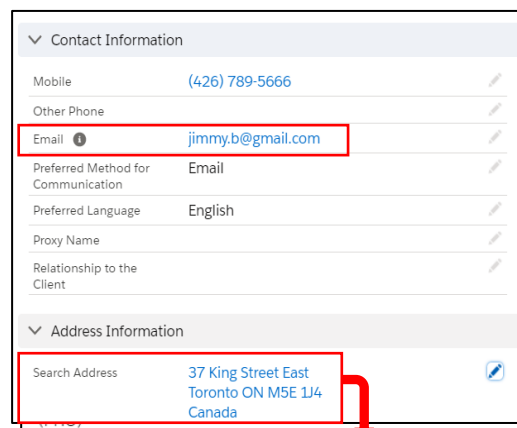
Institution:

Home Phone:

Retirement Home: Healthcare Worker

Check In Job Aid

- **Institution:** If the Reason for Immunization field is populated with a value from Congregate Living, Long Term Care, Retirement Home, or Youth 12+, the appropriate institution field will become mandatory. For example, if the client resides in a LTCH, that institution must be selected. Alternatively, if the client is a Youth aged 12-17, their school institution must be selected to proceed. For all other Reason for Immunization values selected, the Institution field is optional.
- **Contact Details:** With the client's consent, collect contact information (phone number and/or email address). If the client would like to receive their immunization receipt via email, the email address field must be populated and the "**Preferred Method for Communication**" is set to email.
- **Address:** Users should type the client's provided address into the "**Search Address**" field which is integrated with Google maps and the address details will be populated to the client's record automatically.
- **Public Health Unit:** PHU field on the client record is auto populated based on the client's postal code. If the mapped PHU is incorrect, users may update the PHU on the client record. If the postal code is deleted from the client record, the PHU remains on the record.



The screenshot shows a form with two main sections: 'Contact Information' and 'Address Information'. In the 'Contact Information' section, the 'Email' field is highlighted with a red box and contains the value 'jimmy.b@gmail.com'. Below it, the 'Preferred Method for Communication' is set to 'Email'. In the 'Address Information' section, the 'Search Address' field is highlighted with a red box and contains the value '37 King Street East, Toronto ON M5E 1J4, Canada'. A red arrow points from the 'Search Address' field to the 'Preferred Method for Communication' field.

Further Context

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

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