

Inventory Reporting Job Aid

Your Profile: COVax Inventory Manager, Site Super User, Site Staff

Users can leverage various reports in COVaxON to aid in their understanding of inventory availability at the Authorized Organization (AO) and Vaccination Event (VE) levels.

Inventory Reporting

Managing reports and specific inventory reports will be covered in this job aid which are listed in the table below. **Click the relevant link:**

#	Section	Description
1	Accessing Reports	Instructions on how to add the “Reports” tab to the navigation bar, how to open a report, and a section report overview.
2	Filtering, Sorting, and Grouping Reports in COVaxON	Users can manipulate report data in COVaxON by filtering, sorting, and grouping fields
3	Exporting Reports to Excel	Reports display ~2000 records when opened in COVaxON. To perform further analysis, export the reports(s) to Excel and leverage Excel functions and formulas
4	Vaccine Inventory Report	Indicates information about all inventory at the user’s AO. This report can be accessed by Inventory Managers, Site Staff, and Site Super Users.
5	Event Inventory Report	Indicates the quantity of available doses and adjustments at a specific VE. This report can be accessed by all users.
6	VE and AO Inventory Report	Indicates the quantity of doses that have been allocated to specific VEs within an AO. This report can be accessed by Site Staff and Site Super Users.
7	Shipment Report	Indicates inventory associated to a particular shipment. This report can be accessed by Site Staff, Site Super Users, Inventory Managers
8	Inventory Transaction Report	Indicates information on inventory transactions at the user’s AO. This report can be accessed by Site Staff, Site Super Users
9	Inventory Wastage Report	Indicates information on inventory wastage at the user’s AO. This report can be accessed by Site Staff, Site Super Users

Additional 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

Inventory Reporting Job Aid

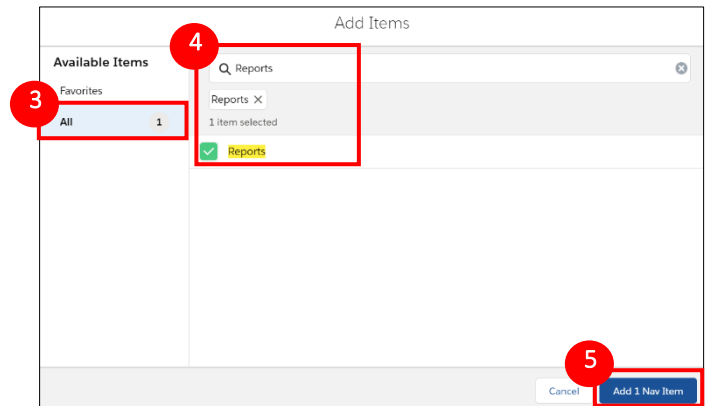
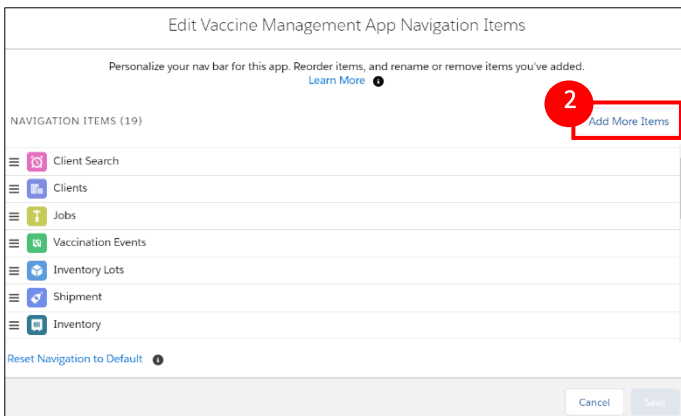
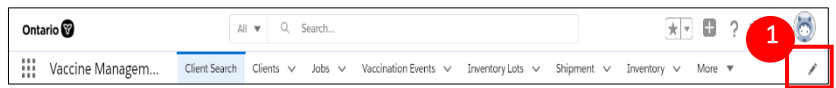
1. Accessing Reports

Description:

Instructions to add the “**Reports**” tab to the navigation bar in COVaxON and how to open a report.

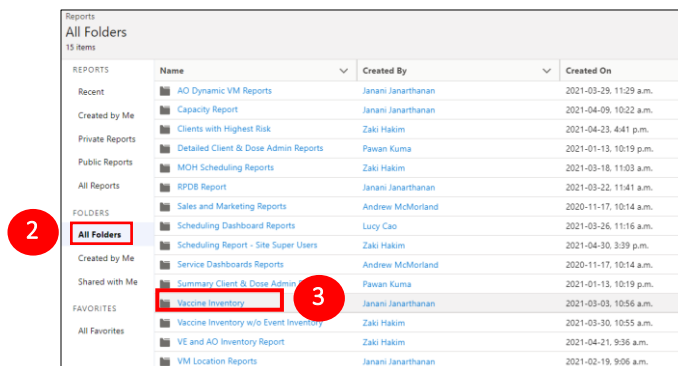
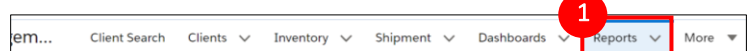
Adding “Reports” Tab to the Navigation Bar

1. In COVaxON, from navigation bar, select the pencil icon
2. A dialogue box will open. Select “**Add More Items**”
3. Under Available Items, select “**All**”
4. In the search bar, search for “**Reports**” and select “**Reports**”
5. Select “**Add 1 New Item**”
6. Select “**Save**”
7. The Report tab will now be added to the navigation bar



Navigating to Reports

1. Select the “**Reports**” tab from the navigation bar
2. Select “**All Folders**”
3. Select the folder for the report you want to view (the search bar can be used to locate a specific folder)
4. Select the report link you would like to view



Inventory Reporting Job Aid

Standard Report Layout

How to navigate the report(s):

The screenshot shows the 'Event Inventory Report' interface. Red circles with numbers 1 through 7 highlight specific features:

- 1**: Report title 'Event Inventory Report'.
- 2**: Search icon.
- 3**: 'Add Chart' button.
- 4**: 'Export' button.
- 5**: Main data table.
- 6**: Dropdown arrow in the table header.
- 7**: Toggle bar at the bottom.

VE Inventory Name	Allocated Doses	Sum of Doses Wasted	Sum of Extra Doses From Vial	Sum of Doses Administered (No Consent)	Number of Administered Doses	Total Remaining Doses
ODERNA COVID-19 mRNA-1273 0.3 ml -	600	0	0	0	1	599
ODERNA COVID-19 mRNA-1273 0.5 ml -	100	0	0	0	6	94
ODERNA COVID-19 mRNA-1273 0.5 ml -	600	32	3	5	1	565
ODERNA COVID-19 mRNA-1273 0.5 ml -	105	10	0	0	5	90
Total	1,405	42	3	5	13	1,348

Row Counts: ☐ Detail Rows: ☐ Subtotals: ☐ Grand Total: ☒

The table describes the different sections within the report and how to use the functionalities

	Report Section	Description
1	Title	Title of the Report
2	Filters	Click on button to modify default filters
3	Export	Click on button to export report to Excel to conduct further analysis
4	Status Bar	Displays key information presented in the report. The status fields vary based on the report type
5	Body of the Report	Contains information pertaining to the report, displayed in the rows and columns
6	Dropdown Arrow	Click on the arrow to either sort or group fields
7	Toggle Bar	Allows the user to change the report layout. To activate a display, select the toggle button

2. Filtering, Sorting, and Grouping Report Fields in COVaxon

Description:

Filters can be used within reports to extract specific information. These are standard filters that have been added to the reports as default. The filters may vary based on the selected report type. Standard filters have values already set, but some can be clicked on and modified.

Users can also sort and group fields to better analyze data in COVaxON.

Inventory Reporting Job Aid

REPORT FILTERS

Standard Filters - All reports can be filtered by a date range

Note: It is recommended not to change the auto populated “**Date**” filter, as many of the options are not in use. Export the report to Excel to perform additional analysis.

When you select the Start/Date filter you can either:

1. Customize the date range:
 1. Select the “**Customize**” hyperlink
 2. Select the calendar icon to change the “**Start Date**” and “**End Date**” to a specific range

Click “**Apply**”

2. View all the records:

1. Select the “**Range**” dropdown
2. Select “**All Time**”

Click “**Apply**”

Additional Filters - Filters vary based on the selected report. Scroll down the filter panel to view default filters.

Note: Filters with a lock icon cannot be modified.

When a default filter is selected, the “**Operator**” and “**Values**” can be modified.

- **Operators*** specify how filter criteria relate to one another. It is like the verb in a sentence
- **Value(s)** are the fields which will be filtered

*Refer to End to End User Guide for more details regarding operators

REPORT SORTING AND GROUPING

Sort Fields – Group rows by a field

- 1) Click on the arrow beside the column header
- 2) Select to sort by ascending or descending

Group Fields – Sort columns by ascending / descending

- 1) Click on the drop column header
- 2) Select “**Group Rows by This Field**”

The screenshots illustrate the following steps:

- Clicking the "Customize" button to open the date range selector.
- Selecting the "Range" dropdown and choosing "All Time".
- Modifying the "Filter by Product: Type" panel, selecting "Vaccine" under the "Values" section.
- Clicking the dropdown arrow next to the "Time Given" column header.
- Selecting "Sort Descending" from the sort options.
- Selecting "Group Rows by This Field" for the "Time Given" column.
- Clicking the dropdown arrow next to the "Last Name" column header.
- Selecting "Group Rows by This Field" for the "Last Name" column.
- The final data table showing rows grouped by "Last Name" and sorted by "Time Given" in descending order.

	First Name	Last Name	Health car...
1	Nelson	Patterson	9998751240
2	Nelson	Patterson	9998751240
3	Jean-Luc	Jones	9996875210

3. Exporting Reports to Excel

Inventory Reporting Job Aid

3.1 How to Export Reports

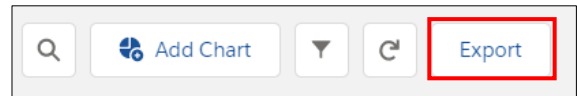
Description:

In COVaxON, reports only display ~2000 records at any time. To view more results, reports can be exported into excel to further sort and filter the data. Reports can be exported into two views, “**Formatted Report**” and “**Details Only**”. It is recommended to export in the “**Details Only**” view because it exports an unlimited number of report rows and columns.

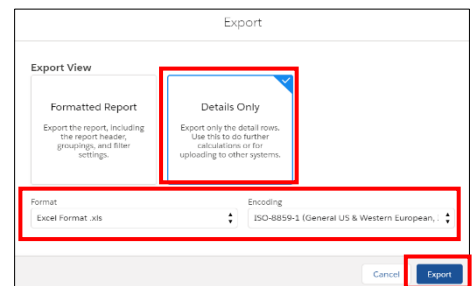
Exporting Reports:

Notes:

- Reports are updated in real time. Refresh the report before exporting.
- Be careful with reports containing PHI/PII data. Do not save the information onto your device



- From the report, click the “**Export**” button on the top right of the report
- An “**Export**” window will pop-up, select “**Details Only**”. The “**Format**” and “**Encoding**” fields are prepopulated
- Click “**Export**”
- The report will be exported into Excel



Difference Between the Two Export Views

Export View	Description	Key Feature
Details Only View (Recommended View)	Export an unlimited number of report rows and columns	Exports each detail row without formatting and offered a filtered data view. It is quicker to manipulate than the Formatted Report view.
Formatted Report	Export up to 100,000 rows and 100 columns	The exported report has the same layout as appeared in COVaxON, with the report header, groupings, and filter details.

Note: Most spreadsheet tools have a per-file row and column limit. Common tool-imposed limits are 1,048,576 rows by 16,384 columns, or 65,536 rows by 256 columns.

Export Views in Excel

Formatted Report	Details Only View

Note: Column filters can be manually added to Formatted View

- Click on the header row
- Select “**Sort & Filter**” from the banner and select “**Filter**”

3.2 Sorting and Filtering Exported Reports in Excel

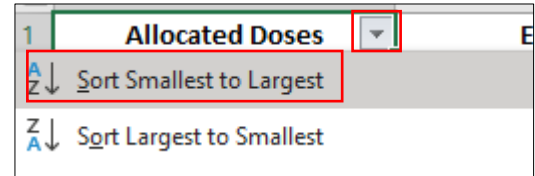
Inventory Reporting Job Aid

Description: Exported reports can be filtered and sorted to drive further insights.

Sorting

Description: Sort data to quickly reorganize a worksheet

1. Click on the dropdown arrow beside the column name
2. Select **"Sort Smallest to Largest"** or **"Sort Largest to Smallest"**

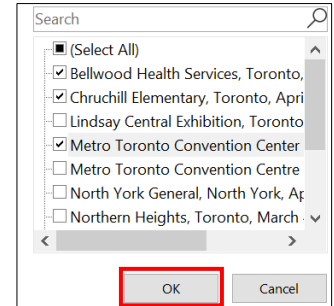


Filtering

Description: Filter data to display records that meet certain criteria

1. Click on the dropdown arrow beside the column name
2. Deselect **"Select All"** and select the desired values. Click **"OK"**.

Vaccination Event: Vaccination Event
Name



4. Vaccine Inventory Report

4.1 Report Overview:

Description:

This report can be leveraged by Inventory Managers, Site Staff, and Site Super Users. It contains inventory record information across a User's Authorized Organization (AO). It also displays information of inventory allocated and distributed to Vaccination Events (VE).

How to Access the Report:

1. From the **"Reports"** tab, search and open the **"Vaccine Inventory"** report. Each row of the report contains information for an individual Authorized Organization inventory record.

Report: Inventory and Event Inventory Vaccine Inventory							
Total Records	Total Received Doses	Total Doses Available	Total Total Doses	Total Total Extra Doses	Total Doses Adjusted (Inventory)	Total Total Doses Administered	Total Doses Pending
90	107,066	97,520	114,682	62	72	360	0
Inventory Name	Type	Inventory Lot: Inventory Lot ---	Lot Number	Product: Product Trade Name	Shipment: Shipment ID	In	
1 PFIZER Diluent 0.9% Sodium Chloride null ml - L10000, 2048-04-29	Diluent	Pfizer Diluent L10000 2048 04 29	-	PFIZER Diluent 0.9% Sodium Chloride	SHIP-000378	Al	
2 PFIZER Diluent 0.9% Sodium Chloride 0.9 ml - Lot45, 2021-05-31	Diluent	-	Lot45	PFIZER Diluent 0.9% Sodium Chloride	SHIP-000011	Al	
3 MODERNA COVID-19 mRNA-1273 0.5 ml - Lot-JZ-0002, 2022-04-20	Vaccine	Pfizer-Lot-001-April26-1	-	MODERNA COVID-19 mRNA-1273	SHIP-000392	Al	

Important Notes:

- Inventory at the Authorized Organization level must be allocated to Vaccination Event(s) for it to be managed and administered at the Vaccination Event.
 - Columns after **"Vaccination Event Name"** show information for a specific Vaccination Event Inventory record
- An inventory record can have multiple rows if it was allocated to multiple VEs

Example Insights/Scenarios

Inventory Reporting Job Aid

- Can be used to understand the allocation of records you oversee within your AO
- Can be used to see the activity of inventory records at the VE(s) level and the inventory that has been allocated to it

4.2 Grand Totals Bar Fields Description

Description of Fields in the Status Bar

Fields in the Grand Totals Bar	Description
Total Records	The number of inventory records there are in the report
Total Received Doses	The grand total of received doses from shipment or from transfer
Total Total Doses	The grand total of doses available at the AO (across linked VEs). This is the initial total doses less any doses administered, wastage events, excursions or recalls
Total Total Extra Doses	The grand total of total extra doses per inventory record
Total Dose (Adjusted)	The grand total of "adjustment" inventory reconciliations made at the AO level
Total Doses Pending	The grand total of pending transfers
Total Total Doses Administered	The grand total of doses administered at the AO (across linked VEs)

4.3 Report Field Descriptions

Description of Fields in the Report and Examples of How to Use Them After an Export is Performed:

Note: Refer to Section 3 for exporting instructions

Fields in the Report/Export (non-exhaustive list)	Description/Examples of how to use the fields in an exported report
Inventory Name	Filter by a specific inventory name to locate the shipment and associated inventory record(s)
Type	Filter by product type (ex. Vaccine or Diluent)
Inventory Lot: Inventory Lot Name	Filter by a specific inventory lot number to locate the shipment and associated inventory record(s)
Lot Number	Filter by a specific lot number to locate the shipment and associated inventory record(s)
Inventory: Status	Filter by the status of the inventory. When available inventory reaches 0 doses and is depleted, the status changes to "Complete" . When new doses are received the status becomes "Available"
Received Doses	Sort to see the number of received doses from shipment or from transfer
Doses Available	Sort to see the number of doses available at the AO (across linked VEs). This is the initial total doses less any doses administered, wastage events, excursions or recalls
Total Doses	This reflects the total number of doses managed by the AO – this includes what was received in the initial Shipment, plus any received transferred doses, plus any extra doses extracted from vials, minus any sent transferred doses.
Total Extra Doses	Filter out "0" to see all "Extra Doses from Vial" Inventory reconciliations made across all linked VEs
Doses Adjusted (Inventory)	Filter out "0" to see all "Adjustment" Inventory reconciliations made at the AO level
Total Doses Administered	Sort to see the number of doses administered to clients who consented to data collection
Doses Wasted-VE	The sum of all inventory transactions that have the type "Wastage Event" at the VE level
Doses Wasted (Inventory)	Filter out "0" to view the sum of "Wastage" Inventory Reconciliations made at the AO level
Total Doses Wasted	Sort to see the "Wastage" Inventory Reconciliations made at the AO level and across all linked VEs
Doses Relocated	Filter to see the quantity of inventory transferred to other AO(s)

Inventory Reporting Job Aid

Excursion Wastage Doses-Inventory	Filter to see records for any inventory that had excursions due to adverse storage conditions at the AO level
Recall Source	Filter by "Health Canada" or "Manufacturer" to see the source of recall
Doses Recalled	Filter to see the number of doses of that inventory that were recalled
VE Inventory Name	Filter by the inventory name available at your VE
Vaccination Event: Vaccination Event Name	Filter by a specific VE or multiple VE's to focus on inventory records allocated to that VE(s)
Event Inventory: Status	Filter by the status of the event inventory
Allocated Doses	Sort to view the total number of doses allocated to the VE by the AO
Doses Wasted	Filter out "0" to view the quantity of doses wasted at that VE
Doses Administered (No Consent)	Sort to view the total number of clients from that VE who did not consent to data collection in COVaxON but had a dose administered to them
Extra Doses from Vial	Sort to see the cumulative quantity of extra doses extracted from vial at a VE

4.4 Vaccine Inventory Report Scenario Example

Scenario:

View the quantity of doses allocated to the VE(s)

How:

1. Export Vaccine Inventory Report to excel in "**Details Only**" view
2. Select "**Vaccination Event: Vaccination Event Name**" dropdown
3. Deselect "**Select All**" and only select VE(s) of interest
4. Click "**OK**"
5. Click on the letter of the column with the numbers you want to sum and look at the *Excel Status bar* to see the total of the selected cells

Note: Refer to Section 3 for exporting instructions.

Vaccination Event: Vaccination Event Name

AF

Allocated Doses

5000

2500

3000

1000

1000

1200

2300

1000

Search

☒ (Select All)

☒ Bellwood Health Services, Toronto

☐ Churchill Elementary, Toronto, April

☐ Lindsay Central Exhibition, Toronto

☐ Metro Toronto Convention Center

☐ Metro Toronto Convention Centre

☐ North York General, North York, April

☐ Northern Heights, Toronto, March

OK Cancel

Average: 2125 Count: 9 Sum: 17000

5. Event Inventory Report

5.1 Report Overview:

Description:

This report can be leveraged by all users to understand the quantity of doses available at a particular VE within their AO. The report includes dose adjustment and dose administration quantities.

Inventory Reporting Job Aid

How to Access the Report:

1. From a Vaccination Event's page, scroll to the "Report Links" section and select the "Event Inventory Report"
2. Each row contains information for a Vaccination Event Inventory record. The report only shows inventory records that have had doses administered at the VE.

Report Links

Showing Clients for Vaccination Event

Event Inventory Report

Report: Event Inventory with Dose Admin						
Event Inventory Report						
Total Allocated Doses	Total Doses Wasted	Total Extra Doses From Vial	Total Doses Administered (No C...	Number of Administered Doses	Total Remaining Doses	
165	0	0	0	12	153	
VE Inventory Name	Sum of Allocated Doses	Sum of Doses Wasted	Sum of Extra Doses From Vial	Sum of Doses Administered (No Consent)	Number of Administered Doses	Total
ODERNA COVID-19 mRNA-1273 0.5 m	15	0	0	0	2	
ODERNA COVID-19 mRNA-1273 0.5 m	150	0	0	0	2	
PFIZER-BIONTECH COVID-19 mRNA 0.3	0	0	0	0	8	
Total	165	0	0	0	12	

Important Note:

Ensure that any required inventory adjustments are made to the Vaccination Event Inventory record(s) associated to the VE on a regular basis for this report to reflect accurate information. Refer to the "Inventory Job Aid" for instructions on adjusting to the Vaccination Event Inventory record(s).

Example Insights/Scenarios

Can be used to understand the quantity of total remaining doses at the VE.

5.2 Grand Totals Bar Fields Description

Description of Fields in the Status Bar

Fields in the Grand Totals Bar	Description
Total Allocated Doses	The grand total of doses allocated to the VE by the AO
Total Doses Wasted	The grand total of Inventory Reconciliations at the VE
Total Extra Doses From Vial	The grand total of extra doses extracted from vial at the VE
Totals Doses Adminsisted (No Consent)	The grand total of clients from the VE who did not consent to data collection in COVaxON but had a dose administered to them
Number of Administered Doses	The grand total of doses administered to clients at the VE
Total Remaining Doses	The grand total of doses remaining at the VE and available for administration - this includes sum of all initial allocated doses less doses wasted, doses admin (no consesnt), dose admin, plus any extra doses from vial

5.3 Report Field Descriptions

Inventory Reporting Job Aid

Description of Fields in the Report and Examples of How to Use Them After an Export is Performed:

Note: Refer to Section 3 for exporting instructions

Fields in the Report/Export	Description/Examples of How to Use the Fields in an Exported Report
VE Inventory Name	Filter by a specific inventory name which is the same as the linked AO inventory
Sum of Allocated Doses	Sort to see the total quantity of doses allocated to the VE
Sum of Doses Wasted	Count of the total doses logged under a "Wastage" Inventory Reconciliation made at the VE
Sum of Doses Administered (No Consent)	Count of the total doses logged under a "No Consent" Inventory Reconciliation made at the VE
Number of Administered Doses	Sort to see the number of doses that have been administered and which inventory was used
Total Remaining Doses	Total quantity of doses remaining at the VE and available for administration – this includes the initial allocated doses less doses wasted, doses admin (no consent), dose admin, plus any extra doses from vial

5.4 Vaccination Event Inventory Report Scenario Example

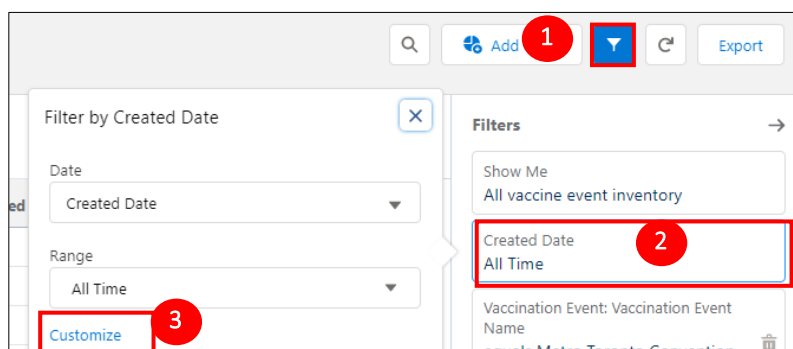
Scenario:

View the quantity of remaining doses today.

How:

Open the Event Inventory Report in COVaxON:

1. Click on the filters icon
2. Select "**Created Date**" filter
3. Select "**Customize**" hyperlink and a "**Start Date**" and "**End Date**" field will appear
4. Select the calendar icon and a calendar window will appear
5. Select the "**Today**" hyperlink for both "**Start Date**" and "**End Date**"
6. Click "**Apply**"
7. The "**Total Remaining Doses**" in the status bar will update to reflect today's Remaining Doses



Inventory Reporting Job Aid

The screenshot illustrates the process of selecting dates for the inventory report. A red box labeled '4' highlights the 'Start Date' and 'End Date' input fields. A calendar for May 2021 is shown, with a red box labeled '5' highlighting the 'Today' button. A red arrow points from the calendar to the date selection fields, which now show '2021-05-21' for both start and end dates. A red box labeled '6' highlights the 'Apply' button. A red arrow points from the 'Apply' button to a summary table.

Total Allocated Doses	Total Doses Wasted	Total Extra Doses From Vial	Total Doses Administered (No Con...	Number of Administered Doses	Total Remaining Doses
1,200	32	3	5	2	1,164

VE Inventory Name ↑	Sum of Allocated Doses	Sum of Doses Wasted	Sum of Extra Doses From Vial	Sum of Doses Administered (No Consent)	fx Number of Administered Doses	fx Total Remaining Doses
ODERNA COVID-19 mRNA-1273 0.3 ml -	600	0	0	0	1	599
ODERNA COVID-19 mRNA-1273 0.5 ml -	600	32	3	5	1	565
Total	1,200	32	3	5	2	1,164

6. VE and AO Inventory Report

Description:

This report can be leveraged by Site Staff and Site Super Users to understand the Inventory that has been allocated to each Vaccination Event within the Authorized Organization (AO). The report provides a breakdown of the vaccination inventory records are grouped by Vaccination Event (VE).

How to Access the Report:

1. Search for the AO in the COVaxON search bar
2. Select the AO to open the record
3. Under **"Reports"** section, select the hyperlink **"VE and AO Report"**

Note: Can also be accessed from the **"Reports"** tab by searching for **"VE and AO"**

The screenshot shows the COVaxON search bar with the text '5700 yonge street - MOHA' entered. Below the search bar, a list of search results is displayed, with the first result '5700 yonge street - MOH Authorized Organization' highlighted by a red box.

The screenshot shows the record page for '5700 yonge street - MOH'. The 'Reports' section is expanded, and the 'VE and AO Report' link is highlighted by a red box labeled '3'.

Inventory Reporting Job Aid



Report: Inventory with Vaccine Event Inventory and Vaccination Event
VE and AO Inventory Report



Add Chart



Edit



This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records	Total Allocated Doses	Total Doses Administered (Known ...	Total Doses Administered (No Con...	Total Doses Wasted-VE	Total VEI Doses Remaining	Total Total Doses
2,229	1,092,440	659,243	1,134	278	122,077	1,292,181

Total Total Doses Administered
1,295,945

<input type="checkbox"/> Vaccination Event: Vaccination Event Name ↓	<input type="checkbox"/> Vaccine Event Inventory: VE Inventory Name ↓	<input type="checkbox"/> Vaccination Event: Vaccination Event Type ↓
<input type="checkbox"/> YWCA Vanuley - TPH Mobile - MilaPROD2 PHISER (4)	PFIZER-BIONTECH COVID-19 VACCINE mRNA 0.3 ml - EW0216, 2021-09-30	Mobile Delivery Site
	PFIZER Diluent 0.9% Sodium Chloride null ml - 22238DK, 2022-10-01	Mobile Delivery Site
	PFIZER Diluent 0.9% Sodium Chloride null ml - 21147DK, 2022-09-01	Mobile Delivery Site



Example Insights/Scenarios

Count the quantity of doses available / allocated at a Vaccination Event(s).

6.2 Grand Totals Bar Fields Description

Description of Fields in the Status Bar

Fields in the Grand Totals Bar	Description
Total Records	The number of inventory records there are in the report
Total Allocated Doses	The grand total of doses allocated to the VE(s)
Total Doses Administered (Known Client)	The grand total of doses administered to clients through regular or simplified flow process in COVaxON within the AO
Total Doses Wasted-VE	The grand total of all inventory transactions that have the type "Wastage Event" at the VE level
Total VEI Doses Remaining	The grand total of VEI doses remaining across all VE within the AO. Includes the allocated doses, extra doses, less doses wasted-VE and doses administered
Total Total Doses	The grand total of doses within the AO

6.3 Report Field Descriptions

Inventory Reporting Job Aid

Description of Fields in the Report and Examples of How to Use Them After an Export is Performed:

Note: Refer to Section 3 for exporting instructions

Fields in the Report/Export	Description/Examples of How to Use the Fields in an Exported Report
Vaccination Event: Vaccination Event Name	Filter the view inventory records allocated to a specific VE
Vaccine Event Inventory: VE Inventory Name	Click on hyperlink to view details for the VE Inventory Record
Vaccination Event: Vaccination Event Type	Filter to see records for a specific vaccination event type (ex. Only interested in viewing inventory details at Mass Immunization Clinics)
VEI Status	Filter to see records for a specific status (ex. Only interested in viewing inventory that is in the status "Available" or "Entered In Error")
Allocated Doses	Count the total quantity of doses allocated to the VE(s)
Doses Administered (Known Client)	Count the number of doses administered to clients through regular or simplified flow process in COVaxON associated to the VE
Doses Administered (No Consent)	Count the number of recorded doses administered to client who did not consent to data collection associated to the VE
Doses Wasted-VE	Count the sum of all inventory transactions that have the type "Wastage Event" at the VE level
VEI Doses Remaining	Reflects the quantity of VEI doses remaining. Includes the allocated doses, extra doses, less doses wasted-VE and doses administered
Inventory Name	Sort records by inventory name
Type	Sort by product type, Diluent or Vaccine
Status	Sort by inventory status. (New is when inventory has been received; Complete is when the inventory runs out)
Total Doses	Reflects the total doses of the associated inventory. Includes the shipment received doses, relocated (received doses), total extra doses from via (VE), less any relocated (dispatched) doses
Total Administered	Count the total administered doses by VEI within the AO
Doses Available	Count the number of VEI doses available within the AO. This is the initial total doses less any doses administered, wastage events, excursions or recalls
Doses Wasted-Inventory	Count the number inventory transactions that have the type "Wastage Event" made at the AO level
Excursion Wastage Doses-Inventory	Count the number inventory transactions that have the type "Excursion Event" made at the AO level
Total Doses Wasted	Count the number of doses wasted at the AO and VE level

6.4 AO and VE Report Scenario Example

Scenario:

View the quantity of inventory available today at specific VE(s).

How:

Open the VE and AO Inventory Report in COVaxON:

1. Click on the filters icon
2. Select "**Created Date**" filter
3. Select "**Customize**" hyperlink and a "**Start Date**" and "**End Date**" field will appear
4. Select the calendar icon and a calendar window will appear
5. Select the "**Today**" hyperlink for both "**Start Date**" and "**End Date**"

Inventory Reporting Job Aid

6. Click “Apply”

The report will produce all Vaccination Event Inventory records across all VEs. To filter by a specific VE, export the report to “**Details Only**” (Refer to the Exporting Section for more details)

Open the exported VE and AO Inventory Report in Excel

7. Click on “Vaccination Event: Vaccination Event Name” dropdown

8. Deselect “Select All” and only select VE(s) of interest

9. Click “OK”

10. Click on the letter of the column with the numbers you want to sum or select a specific range and look at the Excel Status bar to see the total of the selected cells

Allocated Doses	Doses Available	Va
100	84	Met
100	148	Torc
500	3626	Torc
60	74	Torc
500	500	Torc
100	78	Torc

7. Shipment Inventory Report

Description:

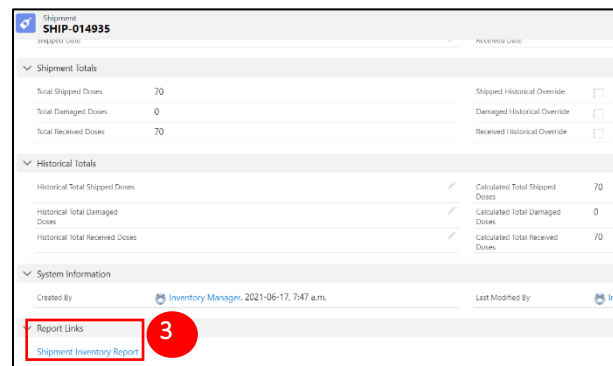
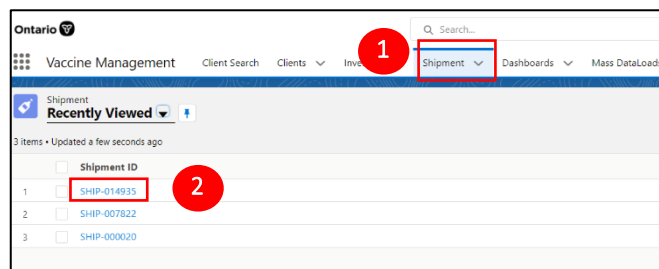
This report can be leveraged by Site Staff, Site Super Users, Inventory Managers to view details of all inventory associated to a particular shipment.

Inventory Reporting Job Aid

How to Access the Report:

1. Open "Shipment" Tab
2. Click on the desired Shipment ID Hyperlink to open the shipment record. The search bar can also be used.
3. Scroll down to the "Report Links" section and click on the "Shipment Inventory Report" hyperlink to open the report

Note: The report can also be accessed from the Reports tab by searching for "Shipment Inventory"



Report: Shipment Line Item - CUSTOM
Shipment Inventory Report

Report showing all shipment line items with their inventories

Total Records	Total Received Doses	Total Inventory: Total Doses	Total Inventory: Doses Available	Total Inventory: Doses Relocated	Total Inventory: Doses Recalled
45	71,641	74,350	74,066	1,574	0

	Inventory: Inven...	Inventory: Authorized Orga...	Inventory: Transferring To O...	Inventory: Storage Lo...	Received Doses	Inventory: Total Doses	Inventory: Doses Available	Inventory: Doses Relocated
1	PFIZER Diluent 0.9% Sodium Chloride 0.2 ml - 20363012, 2023-08-31	Ontario Health - HRM	-	-	1,000	1,000	1,000	-
2	JANSSEN COVID-19 VACCINE 0.5 ml - JD005, 2025-05-05	Ontario Health - HRM	-	-	1,000	1,000	1,000	-
3	COVISHIELD VACCINE INV 0.5 ml - Lot-1711, 2021-06-25	Toronto Hospital	-	-	1,200	2,700	2,700	-

Example Insights/Scenarios

Can be used to count the quantity of shipment doses available

Can be used to understand the allocation of shipment doses

7.1 Grand Totals Bar Fields Description

Description of Fields in the Grand Totals Bar

Fields in the Status Bar	Description
Total Records	The number of inventory transaction records there are in the report
Total Received Doses	The grand total received doses within the associated shipment
Total Inventory: Total Doses	The grand total doses within the associated shipment
Total Inventory: Doses Available	The grand total of doses available within the associated shipment
Total Inventory: Doses Relocated	The grand total of doses relocated within the associated shipment
Total Inventory: Doses Recalled	The grand total of doses recalled within the associated shipment

7.2 Report Field Descriptions

Inventory Reporting Job Aid

Description of Fields in the Report and Examples of How to Use Them After an Export is Performed:

Note: Refer to Section 3 for exporting instructions

Fields in the Report/Export	Description/Examples of How to Use the Fields in an Exported Report
Inventory: Inventory Name	Filter for the shipment inventory name
Inventory: Authorized Organization: Authorized Organization Name	Filter by the AO that the inventory belongs to
Inventory: Transferring To Org: Authorized Organization Name	Filter by the AO that the inventory is being transferred to (if applicable)
Inventory: Storage Location: Storage Location Name	View the location that the inventory is being stored at
Received Doses	The received doses pulled from the shipment line item(s)
Inventory: Total Doses	This reflects the total number of doses managed by the AO – this includes what was received in the initial Shipment, plus any received transferred doses, plus any extra doses extracted from vials, minus any sent transferred doses.
Inventory: Doses Available	The sum of all of doses available in the shipment line item(s). This is the initial total doses less any doses administered, wastage events, excursions or recalls
Inventory: Doses Relocated	The number of doses being relocated to another AO
Inventory: Doses Recalled	The number of doses that were recalled

8. Inventory Transaction Report

Description:

This report can be leveraged by Site Staff, Site Super Users to view all inventory transactions within your AO.

How to Access the Report:

1. From the “**Reports**” tab, search and open the “**Inventory Transactions**” report. Each row of the report contains information for an individual inventory transaction.

Report: Inventory with Inventory Transactions Inventory Transaction Report								
Report showing all inventory transactions at an AO								
Total Records	Total Quantity							
1,400	186,542							
Inventory Name ↑	Total Do...	Doses...	Inventory Product	Inventory Transaction...	Inventory Transac...	Reason ↓	Quantity	
ASTRAZENECA COVID-19 VACCINE 0.5 ml - C	102 (4)	17 (4)	ASTRAZENECA COVID-19 VACCINE	IT-30796	Adjustment	QH - Quantity Adjustm...	30	
			ASTRAZENECA COVID-19 VACCINE	IT-36414	Adjustment	QH - Quantity Adjustm...	2	
			ASTRAZENECA COVID-19 VACCINE	IT-33693	Adjustment	QH - Quantity Adjustm...	10	

Important Notes:

- Columns before “**Inventory Product**” display information for the **inventory record at the shipment level**
- Columns after “**Doses Available**” display information for the **inventory record at the transaction level**

Example Insights/Scenarios

Can be used to view the total quantity of doses available by product type

Inventory Reporting Job Aid

Can be used to understand the allocation of shipment doses

8.1 Grand Totals Bar Fields Description

Description of Fields in the Grand Totals Bar

Fields in the Grand Totals Bar	Description
Total Records	The number of inventory transaction records there are in the report
Total Quantity	The grand total of all inventory transactions within the AO

8.2 Report Field Descriptions

Description of Fields in the Report and Examples of How to Use Them After an Export is Performed:

Note: Refer to Section 3 for exporting instructions

Fields in the Report/Export	Description/Examples of How to Use the Fields in an Exported Report
Inventory Name	The name of the shipment inventory including the lot number
Total Doses	This reflects the total number of doses managed by the AO – this includes what was received in the initial Shipment, plus any received transferred doses, plus any extra doses extracted from vials, minus any sent transferred doses.
Doses Available	The sum of all of doses available in the shipment. This is the initial total doses less any doses administered, wastage events, excursions or recalls
Inventory Product	The product name
Inventory Transaction: Inventory Transaction ID	Transaction ID for each individual transaction within a shipment
Inventory Transaction: Record Type	Type of transaction (Adjustment, Extra Doses from Vials etc.)
Reason	View the reason for transaction
Quantity	View the total quantity adjusted (at the AO or VE level)
Vaccination Event	Filter to view records for a specific VE

9. Inventory Wastage Report

Description:

This report can be leveraged by Site Staff, Site Super Users to view details of all inventory wastage records within an AO (includes shipment damages, wastage/excursions at the AO level and wastage at the VE level)

How to Access the Report:

Inventory Reporting Job Aid

1. From the “**Reports**” tab, search and open the “**Inventory Wastage**” report. Each row of the report contains information for a wastage event.

Report: Shipment Line Item - CUSTOM Inventory Wastage Report						
Total Records	Total Damaged Doses	Total Inventory: Doses Wasted-Inv...	Total Inventory: Doses Wasted-Wa...	Total Inventory: Doses Wasted-VE	Total Inventory: Excursion Wastage...	
22	850	200	0	0	0	
Total Inventory: Total Doses Wasted						
200						
Inventory: Authoriz...	Shipment ID: Shipmen...	Inventory: Inventory Name ↓	Shipment Line Item ID ↓	Damag...	Inventory: Doses Waste...	Inventory: Doses Wa
Toronto Hospital (7)	SHIP-014928 (3)	PFIZER-BIONTECH INV 0.3 ml - Lot-1919, 2021-06-30	SLI-120221	0	0	
		COVISHIELD VACCINE INV 0.5 ml - Lot-1711, 2021-06-25	SLI-120222	200	0	

Example Insights/Scenarios

Can be used to view the quantity of damaged doses per shipment

Can be used to view the quantity of wasted doses per shipment

8.1 Grand Totals Bar Fields Description

Description of Fields in the Grand Totals Bar

Fields in the Grand Totals Bar	Description
Total Records	The number of inventory wastage records there are in the report
Total Damaged Doses	The grand total of all damaged doses across all shipment records
Total Inventory: Doses Wasted-Inventory	The grand total of all of inventory transactions that have the type “Wastage Event” at the AO level
Total Inventory: Doses Wasted-Waste	The grand total of historical wastage events (if applicable)
Total Inventory: Doses Wasted-VE	The grand total of inventory transactions that have the type “Wastage Event” at the VE level
Total Inventory: Excursion Wastage Dose-Inventory	The grand total of all inventory transactions that have the type “Excursion Event” at the AO level
Total Inventory: Total Doses Wasted	The grand total of wastage inventory transactions made at the AO level and the VE level

8.2 Report Field Descriptions

Inventory Reporting Job Aid

Description of Fields in the Report and Examples of How to Use Them After an Export is Performed:

Note: Refer to Section 3 for exporting instructions

Fields in the Report/Export	Description/Examples of How to Use the Fields in an Exported Report
Inventory: Authorized Organization: Authorized Organization Name	Filter for a specific Authorized Organization
Shipment ID: Shipment ID	Filter for a specific Shipment ID number
Shipment ID: Calculated Total Damaged Doses	The number of doses damaged in the associated shipment
Inventory: Inventory Name	The inventory name including the lot number
Shipment Line Item ID	The shipment line item ID
Damaged Doses	The number of damaged doses in the shipment
Inventory: Doses Wasted-Inventory	The sum of all inventory transactions that have the type "Wastage Event" made at the AO level
Inventory: Doses Wasted-Waste	The sum of all historical wastage events (if applicable)
Inventory: Doses Wasted-VE	The sum of all inventory transactions that have the type "Wastage Event" at the VE level
Inventory: Excursion Wastage Doses-Inventory	The sum of all inventory transactions that have the type "Excursion Event" at the AO level
Inventory: Total Doses Wasted	The sum of all wastage inventory transactions made at the AO level and the VE level

At end of shift, log out of COVax_{ON} 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.