

COVaxON Edit Dose Admin Records & Merge Duplicate Clients Job Aid

Your Profile: COVax Vaccinator, Site Staff, Site Super Users

Document any changes to Dose Administration (DA) records and manage duplicate clients in COVaxON.

Editing Dose Admin Records & Managing Duplicate Client Activities

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

#	Section	Description
1	Edit a Dose Administration Record	Edit details on a client's dose administration record
2	Change the Status of a Dose Administration Record	Edit the status of a client's dose administration record if it was entered in error, invalid or associated with a recalled inventory
3	Merge Duplicate Client Records	Merge duplicate client records found in the system
4	Reconcile Partial Address Information on the Client Record	Compare and reconcile client information listed in COVaxON and RPDB
5	Mark Clients as Inactive	Mark client records as inactive if their record will no longer be used in COVaxON

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

1. Edit a Dose Administration Record

Description:

Once the dose is administered and the user clicks "**Finish**", a dose administration record populates. However, if needed, **Vaccinators and Site Super Users** can edit the Dose Admin record after being recorded in COVaxON.

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Editing the details on a client's dose admin record:

1. To edit the dose admin (DA) record after it has been saved in COVaxON, re-open the record by clicking **"Edit"** from the drop-down arrow in the Dose Administration section on the client's record.
2. Update any of the fields with a pencil icon except the **"Status"** field. Edits to the DA record status must follow the process outlined in Section 2 below.

Note:

- The date and time of the dose received can be edited but cannot be removed. Once completed, click **"Save"** to re-save the record.
- The AEFI checkbox can be edited from the Dose Administration record only.

Vaccine Related

Any Adverse Events After Immunization?

Dose Administration (2)

DA-414137

Time Given: 2021-03-22, 2:03 p.m.

Status: Administered

Edit

EDIT: DA-414137

Information

Client: Jack Moore

Subs: Administered

Dose Administration: DA-414137

Time Given: 2021-03-22 2:03 PM

Reason for Immunization: Age Priority Population

Route: Intramuscular / Intramuscular

Anatomical Site: Right outside / outside shot

Vaccine Administered: John Demby, Medical Doctor, 394

Vaccination Event: Lateridge Health Outreach - Menix

Inventory Details

Vaccine: MODERNA COVID-19 mRNA-1273

Site Location: Lateridge Health Outreach - Floor 5 - Freeway B

The Screening Assessment

3. If needed, re-print the client's receipt based on the edits made to their dose record. **To re-print the edited receipt:**

1. Open the client's revised dose record by selecting the Dose Admin Record ID (i.e. DA-414137) from the client's record. Right click on DA hyperlink to open the record in new browser window to avoid losing your spot on the client's record.
2. This will open the Dose Admin Record and you will see a **"Generate Receipt"** button on the top right corner. Select **"Generate Receipt"**.
3. A pop-up window will open. If the client's record has an email address populated, there will also be an option to email the new receipt to the client. If there is no email populated, but the client would like their receipt emailed, users must edit the **"Contact Information"** section of the client record to add an email address. Check the box to email receipt if desired. Otherwise, click **"Next."**
4. Click **"Finish"** to generate a new receipt.

Dose Administration (2)

DA-414137

Time Given: 2021-03-22, 2:03 p.m.

Status: Administered

Generate Receipt New Opportunity Printable View

Generate Receipt

Email receipt to patient

Click here to view receipt

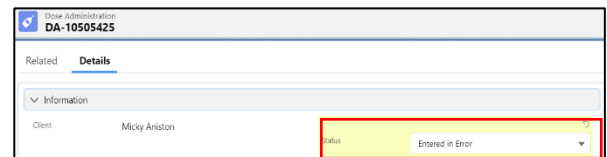
Next

The new receipt will populate under the **"Files"** section on the client's record (where the previous receipts are located). For guidance on physically printing the receipt, refer to the *Check Out job aid*.

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Note: If the inventory was incorrectly selected during dose administration, the status of that record should be changed to **“Entered in Error”**

1. Open the dose admin record and from change the **“Status” “Entered in Error”**. As a result:
 - o 1 dose gets added back to the Doses Available Inventory
 - o Client status changes to **“New”** (if “Dose 1 checked out”) or **“Dose 1 checked out”** (if “Dose 2 checked out”)



2. Check in client and follow the proper dose administration flow, select the correct product

For more details see the **“Entered in Error”** dose status scenario in the table below.

2. Change the Status of a Dose Administration Record

Description:

The Dose Administration (DA) record status may be changed by **Vaccinators and Site Super Users** from **“Administered”** to **“Invalid”**, **“Inventory Recalled”** or **“Entered in Error”** based on 3 scenarios outlined in the chart below.

How:

1. Select **“Review Dose Administered”** from the arrow drop down on the top right corner of the client record
2. Select the Dose Administration record that requires a status update and select the status that the record should be changed to (refer to the table below summarizing how each status should be used)
3. The details of the changes will populate in the **“Review Dose Administered”** screen. Review and click **“Next”** and a confirmation screen will open. Click **“Next”**.
4. The stage in the client header will move from **“Completed”** back to **“In Progress”**, and the Client’s status will change from **“Dose 2 checked out”** to **“Dose 1 Checked Out”** (for double dose products) or from **“Dose 1 checked out”** to **“New”** (for a single dose product).

The screenshot shows the Ontario Vaccine Management System interface. The client record for Ms. Lisa Atwood is displayed. The 'Administer Dose' dropdown menu is open, and 'Review Dose Administered' is selected. The 'Review Dose Administered' screen shows a table of dose administration records with columns for Dose Administration ID, Status, Time Given, Org Vaccine In..., and Comments. The status is set to 'Entered in Error'. A confirmation message states: 'You're about to update the dose administered status. You CANNOT undo this update. Please click Next to proceed further. DA-414365 Dose Administration Status - Entered in Error Updated Client Status - Dose 1 checked out'. The 'Next' button is highlighted.

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Dose Status	Scenario for the Status Change	Result
Invalid	<p>If there is a clinical issue related to the dose administration record, the status of that record should be changed to "Invalid". For example:</p> <ul style="list-style-type: none"> The client received dose 2 too soon The client received another vaccine type too close to the COVID-19 vaccine (proximity of days). <p>The client will need to return to be vaccinated again. Refer to the product monograph or NACI guidelines for additional details regarding next steps for client re-immunization (provided in the MOH Clinical Package).</p>	<ul style="list-style-type: none"> Does not adjust inventory Client status changes to "New" if client was "Dose 1 checked out" and their dose 1 record was adjusted Client status changes to "Dose 1 checked out" if client was in "Dose 2 checked out" and their dose 2 record was adjusted
Inventory Recalled	<p>If an inventory lot is recalled, the status of the DA record should be changed to "Inventory Recalled". For example, if it was identified that a particular lot has shown to be ineffective.</p> <p>The client will need to return to be vaccinated again. Refer to the product monograph or NACI guidelines for additional details regarding next steps for client re-immunization (provided in the MOH Clinical Package). The "Detailed Dose Client & Dose Admin" report available to Site Super Users can be used to identify clients administered with the recalled inventory.</p>	
Entered in Error	<p>If a dose administration record is created in error (and that dose was not physically received by the client), the status of that record should be changed to "Entered in Error". For example:</p> <ul style="list-style-type: none"> If the dose was already administered to the client and logged in COVaxON, so the new DA is a duplicate. This is for historical client records as the system currently prevents duplicate doses. The client record already existed, but a duplicate client record was created with a new dose administration record. Vaccinators accidentally recorded the dose administration to the wrong client record instead of the client presently being vaccinated. In this case: <ul style="list-style-type: none"> On the wrong client: Check out the client, then follow the process to change the status of that client to "Entered in Error". Then check them in and follow the proper dose administration flow when that client actually receives their dose. 	<ul style="list-style-type: none"> 1 dose gets added back to the Doses Available Inventory Client status changes back to "New" if client was "Dose 1 checked out" and their dose 1 record was adjusted OR Client status changes back to "Dose 1 checked out" if client was in "Dose 2 checked out" and their dose 2 record was adjusted

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- On the correct client: Search and find the correct client using identifiers such as HCN, date of birth, etc. Enter the dose administration for that client.

Further Context

- There is another status available **“Wasted”**. **This status should not be used.**
- Before conducting an adjustment to a Dose Administration record, the client must be in the **“Dose 1 (or 2) Checked Out”** status. It is not recommended to make any changes to dose administration records while the client is in the middle of the dose administration process.

3. Merge Duplicate Client Records

Description: When a duplicate client record is discovered in COVaxON, the two client records can be merged by **Site Super Users** to eliminate the duplicate record in the system. If a duplicate record is not discovered by COVaxON, but a user would like to merge the client records, they can manually link duplicates and then merge the records.

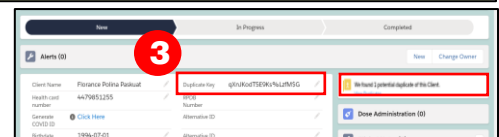
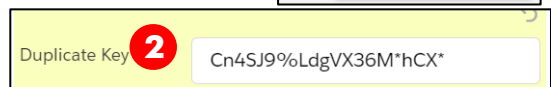
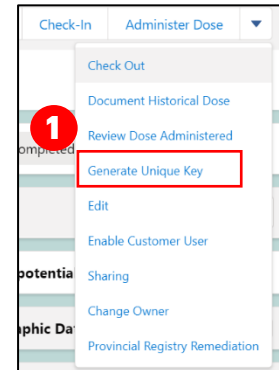
Note: Including a health card number for a client (if available) on their record is the best defense against creating duplicate clients.

If COVaxON does not recognize the client records as duplicates, refer to step A. If COVaxON does recognize the client records as duplicates, skip to step B below.

A. COVaxON Does Not Recognize Duplicate Records

If a duplicate is not detected in COVaxON **AND** it is confirmed that the 2 client records are in fact duplicates, there is an alternative method to recognizing them as duplicates in COVaxON:

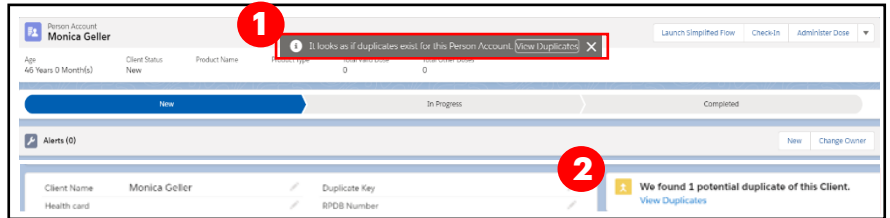
1. From one of the client records that is identified as a duplicate, select **“Generate Unique Key”** from the dropdown arrow.
2. A **“Generate Unique Key”** window will appear. Select **“Next”**
3. This will add a **“Duplicate Key”** field to the client’s record.
4. The User should then locate the 2nd client record that has been identified as a duplicate.
5. Paste the duplicate key from the 1st client’s record, into the 2nd client’s record. This will create a link between the 2 records in COVaxON and the **“View Duplicates”** option will appear. Select **“View Duplicates”** and the duplicate client records will appear in a new window.
6. Right click on the client name hyperlinks and select **“Open Link in New Window”** for both clients.
7. Review the details on both client records to ensure that these two clients are in fact the same client. Validate details such as name, date of birth, address, etc.
8. The COVaxON system now recognizes the 2 client records as duplicates. Proceed to section B below.



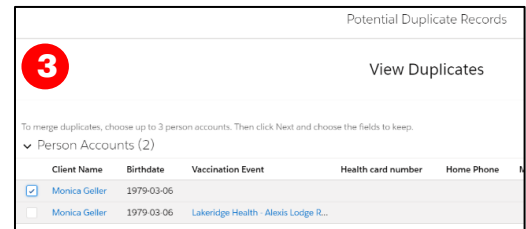
B. COVaxON Recognizes Duplicate Records

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1. From the duplicate client record, a warning message will appear on the top of the record indicating that a duplicate exists.
2. It will also show that the client is a duplicate on the right-hand side of the record (for any newly created clients, or any previously created clients). Click on **“View Duplicates”** and the duplicate client records will appear in a new window.



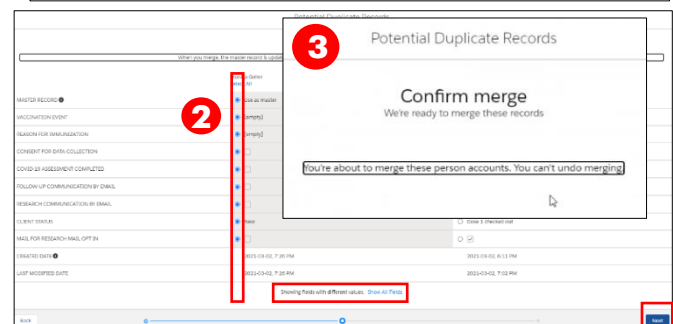
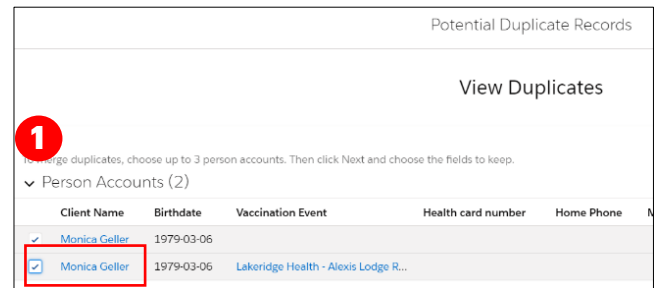
Modify Dose Administration Records: After reviewing and confirming the 2 records are in fact the same client, first check the Dose Administration records on each record to determine if they are valid as any dose administration records from the non-surviving record will be saved to the surviving record. For any doses that are not accurate and should be cancelled, **the Dose Administration record status should be changed to “Invalid” or “Entered in Error”** (depending on the scenario) prior to performing the merge. Please refer to the steps in Section 2 for details on changing dose admin status to **“Invalid”** or **“Entered in Error”**.



Once COVaxON recognizes that the client records are duplicates, a client record merge can be performed.

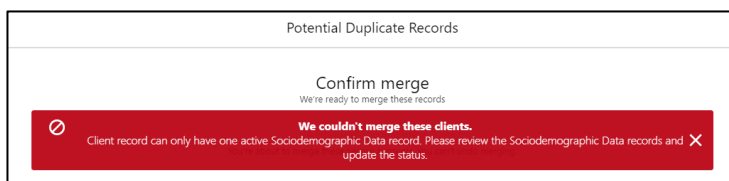
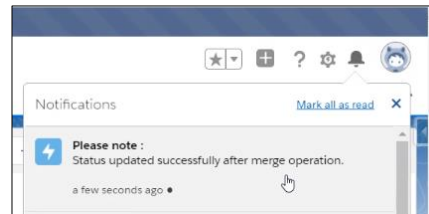
How:

1. Before a merge can be completed, the existing client dose administration records should be reviewed. Please refer to the details in section B above.
2. Return to the **“View Duplicates”** screen
3. Select the checkbox for **both** client records
4. Click **“Next”**
5. Select the record to indicate which record should be considered the **“Master”**. The master record will become the surviving records client name.
6. Select the fields that should be saved on the master between the two records (i.e. which phone number, address, etc. should be saved on the surviving record). *Note: only the records that don't match will appear from the main screen. You can select **“Show All Fields”** to review other fields on the client record. Refer to the **“Considerations for Merging Certain Fields”** section below for further details.*



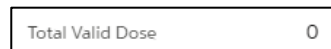
7. Once all correct values have been selected, click **“Next”**
8. Select **“Merge”**. The merge typically happens immediately, but it may take up to 2 minutes. Refresh the client record to see the updates if there is a delay. In addition, a notification is sent to the user who performed the function that the merge was successful.
9. After a merge is completed, the duplicate key (if relevant) is automatically removed from the merged client’s record.

Note: Clients can only have one active Sociodemographic record on their client record. If attempting to merge 2 client records which each have an **“Active”** Sociodemographic record, you will receive this error and you will be blocked from continuing with the client merge. To correct this, determine which Sociodemographic record is accurate, and change the status of the inaccurate one to **“Duplicate/Merged-Obsolete”**. Refer to the **Check In** job aid for more details on editing client Sociodemographic records. Once the status is updated, a client merge can be attempted again and will be successful.



Considerations for Merging Certain Fields:

- Status of the surviving client record will not be based on what is selected from the **“Compare person accounts”** screen above. The Status of the client on the surviving record will be populated based on the number of dose administration records in status **“Administered”**. A field **“Total Valid Dose”** was added to the client record to support this logic. For example, if there are 2 Dose Administration records on a client record, in status **“Administered”** the Total Valid Dose field will display **“2”**.



The status of the surviving record will be populated based on the below:

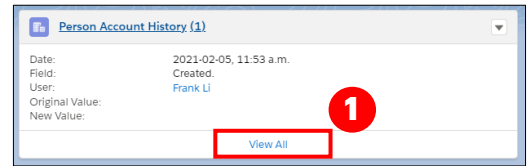
- **Doses Administered:**
 - 0 **“Administered”** Dose Administration records resulting from merge: the surviving client record status becomes **“New”** after merge
 - 1 **“Administered”** Dose Administration record resulting from merge: the surviving client record status becomes **“Dose 1 Checked Out”** after merge
 - 2 (or more) **“Administered”** Dose Administration records resulting from merge: the surviving client record status becomes Dose 2 Checked Out after merge
 - **Note:** in practice, there should not be more than 2 doses in **“Administered”** status on the surviving client record since the User should modify any inaccurate doses prior to performing the merge.
- **PHU/Postal code:** these two fields must be selected as a **“pair”** (both selected from the same client record). This is because the PHU field is populated automatically based on the postal code.
- **Email Notifications:** clients will receive a notification email with the link to CANVAS research if the merge results in the checkbox being selected on the surviving record AND the surviving client record is in status **“Dose 1 Checked Out”**
- On the merge client screen, when selecting the master record and the values that should remain on the surviving client record, the **“Reason for Immunization”** field must be from the master record.

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History of the Merge/Restoring the Merge

The history of the fields of the non-surviving record can also be viewed from the Person Account History:

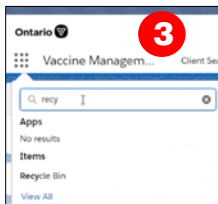
1. From the new client, in the Person Account History section in the "Related" tab, select **"View All"**



2. The history shows the original value and the new value:

Date	Field	User	Original Value	New Value
1 2021-02-12, 9:52 AM	Status	Frank Li	Dose 1 checked out	Dose 2 checked out
2 2021-02-12, 9:52 AM	Email	Frank Li	test123@mailsac.com	testsaturday@mailinator.com

3. After a merge is completed, the non-surviving record can be accessed from the Recycle Bin. It will no longer contain any dose administration records since they were merged with the surviving record. If an incorrect merge was performed on a client with a dose administration record, there is no current solution built in the system to move the dose administration record back to the deleted client. It is essential that the clients are reviewed in detail prior to performing a merge.
4. **To restore a deleted client:** Select the 9 dots (⋮) at the top right corner of the screen in COVaxON, search and select **"Recycle Bin"**. The recycle bin is emptied every 15 days, so 15 days after the merge, the old record will not exist. Locate the non-surviving record. Select the checkbox and select **"Restore"**. This should only be done when it is confirmed the merge was a mistake and is not in fact a duplicate client.



Record Name	Type	Deleted By	Deleted Date
1 test clienttest	Client	Frank Li	2021-02-12, 9:52 AM
2 DRI-0000000017	Duplicate Record Item	Frank Li	2021-02-12, 9:52 AM
3 Chris Brown	Client	Frank Li	2021-02-11, 11:56 AM
4 ONFrankie BaseClient3 sonny	Client	Frank Li	2021-01-29, 8:30 PM

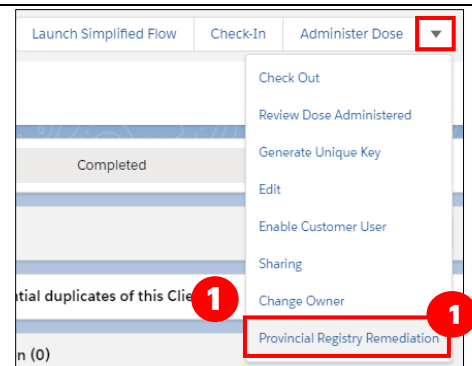
4. Reconcile Partial Address Information on the Client Record

Description:

There is daily integration that runs to compare the information in the Provincial Registry to client records in COVaxON. The information in the Provincial Registry will never override the existing information in COVaxON, it is only used to supplement existing information on client records. To enhance client record information, **Site Super Users** can reconcile information on the client record with the information stored in the Provincial Registry (such as addresses that are only partially filled out).

How:

1. Go to the desired client's record and click on the dropdown arrow and select a **"Provincial Registry Remediation"**
2. Compare the information listed in COVaxON and the Provincial Registry. The information in COVaxON can be found in the **"Value On Client"** column, and the information from the Provincial Registry can be found in the **"Value in Provincial Registry"** column. The information that is populated in the **"Value To Be Updated"** column is what will ultimately be saved on the client's record. Users can update the fields in this column by using the copy and paste function from the **"Value On Client"** column fields.



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3. Click **“Next”** and then **“Finish”**

The client record will be successfully updated with the values pulled from the Provincial Registry.

Provincial Registry Remediation

Please review the following fields for client with HCN 8103394063

Field Name	Value On Client	Value In Provincial Registry	Value To Be Updated
Last Name	YVEDLMS	YVEDLMS	<input type="text" value="YVEDLMS"/>
First Name	NORMA	NORMA	<input type="text" value="NORMA"/>
Middle Name	BARBARA	BARBARA	<input type="text" value="BARBARA"/>
Date of Birth	November 13, 1930	November 13, 1930	<input type="text" value="Nov 13, 1930"/>
Gender	Female	Female	<input type="text" value="Female"/>
Street		BOX 44	<input type="text"/>
City		WELLESLEY	<input type="text"/>
Province		ON	<input type="text"/>
Postal Code	MSV 0L7	NOB 2T0	<input type="text" value="MSV 0L7"/>

2

3

Next

5. Mark Clients as Inactive

Description:

From the client record, clients can be marked as **‘Inactive’**. This will remove the client’s name from any list views on the **“Clients”** tab, and the client record will no longer be used/updated in COVaxON.

How:

1. Go to the desired client’s record
2. Click on the checkbox next to **“Inactive”**
3. Select an **“Inactive Reason”** from the drop-down

Inactive

Inactive Reason

- None--
- Deceased
- Moved out of Province

When a client is marked as **“Inactive”** users will no longer be able to administer doses to that client. If the client has been incorrectly marked as **“Inactive”**, users can go to the client record and uncheck the box.

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.