Inventory Management Job Aid

Your Profile: COVax PCP Vaccinator or COVax Clinic Coordinator

Document client consent for service, complete client dose administration, and record any inventory adjustments at the VE level. **COVax PCP Vaccinators and COVax Clinic Coordinators have the same user profile access as a COVax Vaccinator, along with the ability to record inventory reconciliations at the VE Level.**

Vaccine Administration Activities

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

#	Section	Description
1	Confirm Client Identity & Select Vaccine	Confirm client identity, locate client record and select vaccine details
2	Perform Vaccine Pre-Screening	For dose 1, perform the pre-screening assessment and confirm consent for series. For dose 2 (if applicable), perform pre-screening assessment and ensure consent has not changed
3	Fill in Dose Information	Select and input dose information into COVax$_{ON}$
4	Review Dose Information	Review dose information before completing the dose record
5	Add Alerts to Client Record	Add alerts to client records for additional information (if needed)
6	Add Clinical Notes to Client Record	Add clinical notes directly to the client record (if needed)
7	Direct Client to Monitor for AEFI	Direct client to self-monitor for AEFI, then the client can proceed to check out

VE Inventory Reconciliation Activities

Here are the VE inventory reconciliation tasks you will perform on an as-needed basis.

#	Section	Description
8	VE Inventory Reconciliations	Reconcile inventory at the VE Level for: A. Wastage Events B. Extra Doses from Vial Adjustments C. No Consent Adjustments

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.
- Refer to the "**Edit Dose Admin Records & Merge Duplicate Clients**" job aid for information on historical data entry, editing dose administration records (& re-printing/re-emailing receipts), and merging duplicate client records.
- Refer to the **"Simplified Flow"** job aid if you are a solo clinician performing dose administration, as well as the client check-in and check-out functions.

Disclaimer

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

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

1. Confirm Client Identity & Select Vaccine

Description:
Once the client arrives at the vaccination station, confirm their identity by looking at the details on their client record. Once confirmed, select which vaccine product will be administered.

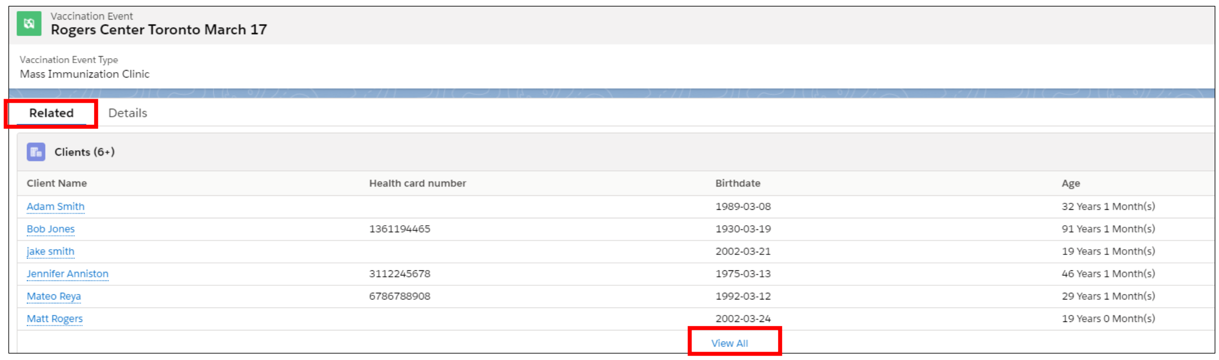
How:
Client records can be found using either the Client Search tab or the Vaccination Events tab:

A. From Client Search

- Open the "**Client Search**" tab and search for a client using their Health Card Number if available (otherwise search using First Name, or Last Name and one other parameter). If a client record populates, open the client record and ensure the client is tagged to the correct VE.

B. From Vaccination Event Record

- Open the relevant Vaccination Event record and click on the "**Related**" tab. Click "**View All**" under the "**Clients**" list.



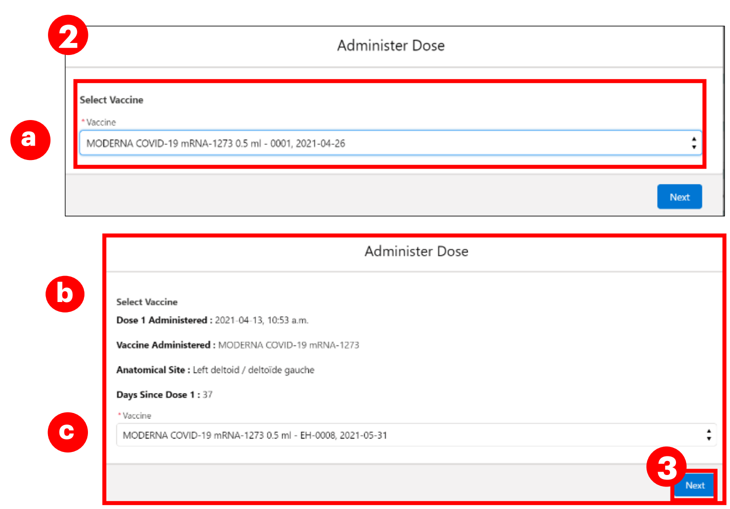
Client Name	Health card number	Birthdate	Age
Adam Smith		1989-03-08	32 Years 1 Month(s)
Bob Jones	1361194465	1930-03-19	91 Years 1 Month(s)
jake smith		2002-03-21	19 Years 1 Month(s)
Jennifer Anniston	3112245678	1975-03-13	46 Years 1 Month(s)
Mateo Reya	6786788908	1992-03-12	29 Years 1 Month(s)
Matt Rogers		2002-03-24	19 Years 0 Month(s)

- Leverage the filter capability in the top right-hand corner of the page to filter the list by status or specific client details (Note: COVaxON saves previous sorting/filtering. When searching for a new client, remember to clear any previous filters).
- Once the client is identified, right click on the client name's hyperlink, and open the client's record.

Note: Once the client record is opened, it is essential that the client identity is properly validated to ensure the correct record has been accessed. Validate the client by Health Card Number (if they have one), or by Name ***plus*** other fields such as Date of Birth, Postal Code, etc. Only validating by name is not enough. Confirm the client is in "**Dose 1 (or 2) Checked-In**" status.

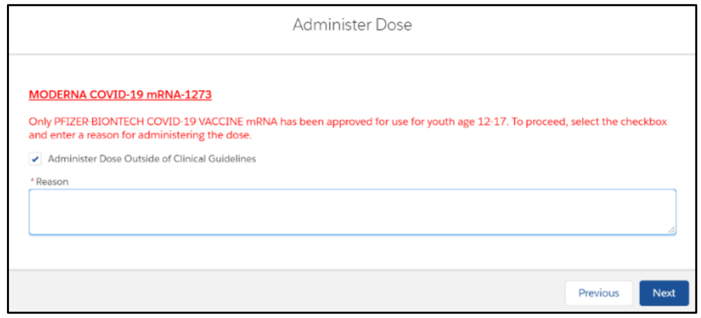
1. From the client's record, click the "**Administer Dose"** button.
2.a) If you are administering the client's first dose, the screen will contain a "**Select Vaccine**" dropdown. If you do not see any inventory values, this indicates that there is no inventory linked to the client's VE.
b) If you are administering the client's second dose, you will receive a pop-up with the Dose 1 information. Review to ensure the client should proceed with dose 2.
c) For dose 2, inventory that is available at the client's Vaccination Event will be available for selection from the drop-down.

Note: Clients with the "**Reason for Immunization**" as "**Youth 12+**" (any client age 12-17) should receive



Pfizer as their vaccine product. If a non-Pfizer product is selected the user will receive a warning message as other vaccine products have not been approved for this group of clients. If the Vaccinator chooses to bypass this warning message (see screenshot), they must check the "**Administer Dose Outside of Clinical Guidelines**" box and populate the "**Reason**" field with a description. Then the Vaccinator can click "**Next**" and continue with the pre-screening assessment. This information will be saved on the client's dose administration record and can only be edited by Site Super Users.

3. After selecting the vaccine inventory for either Dose 1 or Dose 2 click "**Next**".



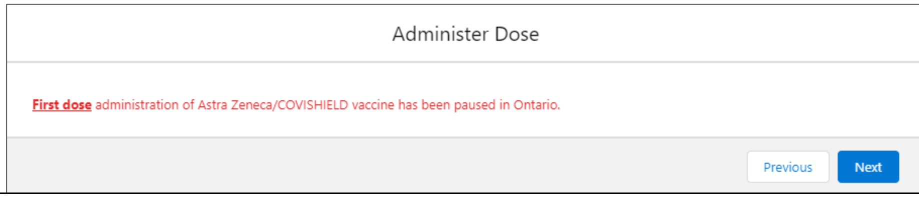
Interchangeability for dose 1 and 2 product types:
When administering a different product for a client's second dose, for example Pfizer, Moderna, AstraZeneca and COVISHIELD, a warning message that can be bypassed will appear. If bypassed, users need to populate additional details:

- Check the "**Administer Dose Outside of Clinical Guidelines**" box
- Populate the "**Reason for Exception**" free text field with additional details
- Select "**Next**". This information will be saved on the client's dose administration record
- If the client being vaccinated with a different product for their second dose is a Youth, a warning message will appear on the same screen shown above if a non-Pfizer product is being selected.

Further Context

- The "**Clients**" view from the Vaccination Events tab 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.)
- Vaccinators can only administer doses to clients that are associated with a Vaccination Event under their Authorized Organization. This will decrement the inventory associated to the Authorized Organization.
- The naming convention for each vaccine/diluent is reflective of the information on the physical labels:
  - Example: Pfizer: *PFIZER-BIONTECH COVID-19 mRNA 0.3 ml - EK4175, 2021-03-31*
  - Example: Moderna: *MODERNA COVID-19 mRNA-1237 0.5 ml – RP0089, 2021-05-29*
  - Example: COVIDSHIELD: *COVID-19 COVISHIELD 0.5 ml – 0001, 2021-03-31*
  - Example: ASTRAZENECA: *ASTRAZENECA COVID-19 VACCINE 0.5 ml - 0008, 2021-06-30*
  - Example: JANSSEN: *JANSSEN COVID-19 VACCINE 0.5 ml – LM0997, 2021-05-29*
- There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, client status, and other client information. To view this report, go to the VE record you are interested in, scroll down to the "**Report Links**" section, and select the "**Showing Clients for Vaccination Event**" record.

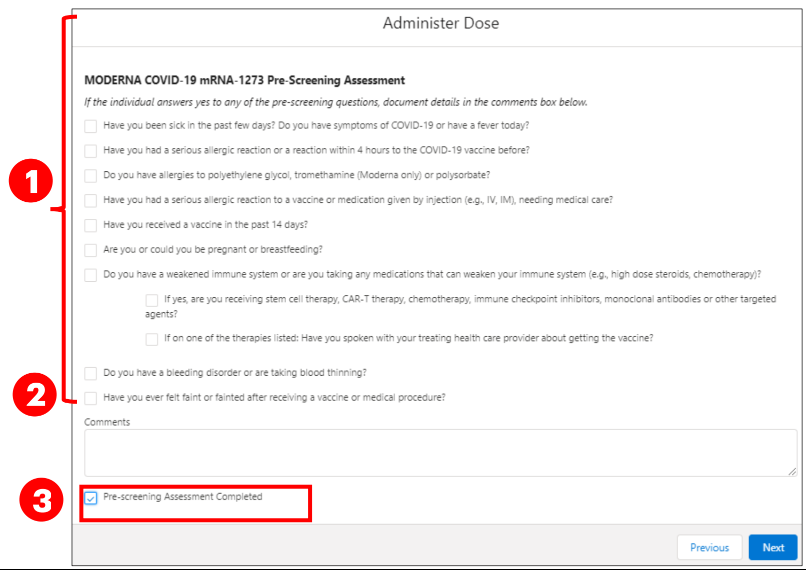
- Minimum product intervals:
    - Pfizer = at least 19 days from the previous dose
    - Moderna = at least 21 days from the previous dose
    - COVISHIELD/AstraZeneca = at least 28 days from the previous dose
    - JANSSEN = a single dose product (no minimum interval)
- Based on new provincial guidelines, the AstraZeneca and COVISHEILD vaccines have been paused for first dose administration in Ontario. An error message will appear if a user tries to administer a first dose to a client.



2. Perform Vaccine Pre-Screening

Description:
Vaccinators can now begin the Pre-Screening Assessment. Once the assessment is finished, the Vaccinator determines whether the client should receive the vaccine.

How:
1. Perform the appropriate Pre-Screening Assessment for the vaccine product. If the client responds "**Yes**" to any of the questions, check the corresponding question checkbox.
2. Use your clinical knowledge to record comments related to the client's conditions if required in the comments box. Clinical notes can also be recorded directly on the client record. See Section 6: "**Add Clinical Notes to Client Record**" for more details.
3. Check the "**Pre-Screening Assessment Complete**" checkbox to confirm assessment completion in COVaxON. This is a mandatory checkbox.



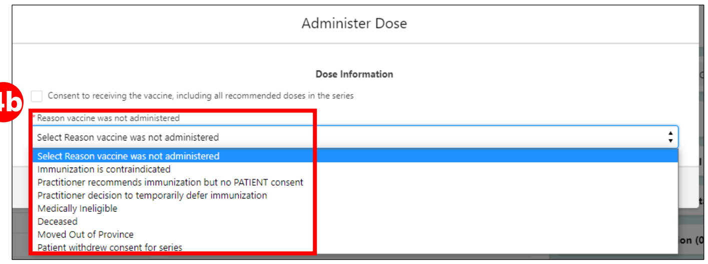
2. Perform Vaccine Pre-Screening

Description:
Vaccinators can now begin the Pre-Screening Assessment. Once the assessment is finished, the Vaccinator determines whether the client should receive the vaccine.

4. Based on the Pre-Screening Assessment, Vaccinators must use their clinical knowledge to determine if the client should receive the vaccine.

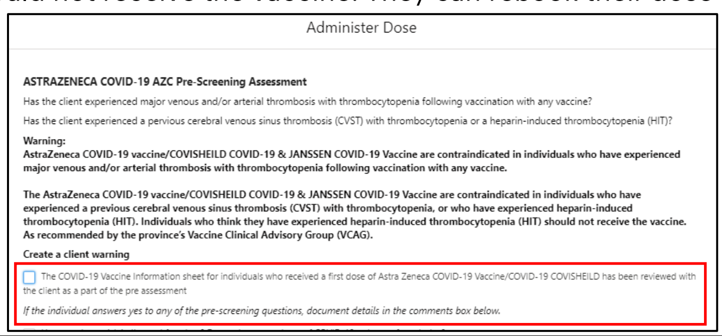
a) If **Yes** (Client may receive vaccine), proceed to Section 3: "**Fill in Dose Information**"

b) If **No** (Client should not receive vaccine), indicate that the pre-screening assessment is complete, and click “**Next**”. On the next screen, leave the consent checkbox blank and populate the “**Reason Vaccination was not Administered**” drop down field on the client’s record. The selection would be **“Immunization was contraindicated”** or **“Practitioner decision to temporarily defer immunization.”** The client can then exit the location. In COVaxON, the client’s status will automatically reset to “**New**” (for dose 1) or, “**Dose 1 Checked Out**” (for dose 2).



Notes

- There is a “**Historical Pre-Screening Assessment**” section within the client’s dose administration record that shows responses to any pre-screening checklist questions that were removed based on vaccine guidelines.
- The pre-screening assessments for AstraZeneca, COVISHIELD, and Janssen products have an added warning message at the top related to contraindications. If the client has a contraindication, an alert should be created on their client record, and the client should not receive the vaccine. They can rebook their dose appointment for a later time.
- The pre-screening assessment for AstraZeneca and COVISHIELD also has a mandatory checkbox confirming that the COVID-19 Vaccine Information sheet has been reviewed with the client



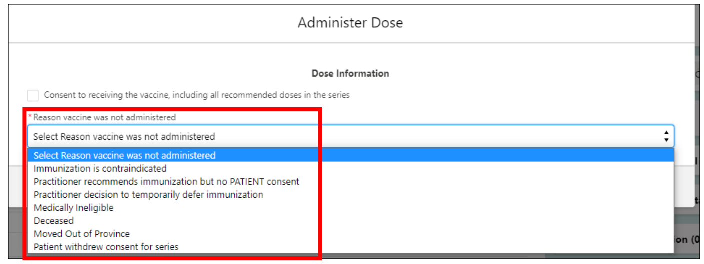
3. Fill in Dose Information

Description:
Obtain and record client consent for service and specific dosage information in COVaxON.

How:

1. **For the client’s first dose:**

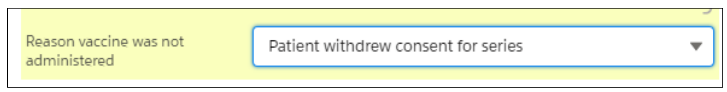
- Obtain verbal consent for receiving the vaccine, including all recommended doses in the series and populate the checkbox to confirm. Once the consent checkbox is populated, the remaining fields on the Administer Dose screen will appear.
- If the client does not consent, populate the "**Reason Vaccine was not Administered**" drop down with "**Practitioner recommends immunization but no patient consent**", then click "**Next**" and "**Finish**". After filling in this pop-up window, the client's status will change back to "**New**". The "**Reason vaccine was not administered**" field will be populated on the client's record. The client can exit the location without immunization.



2. For the client's second dose (if applicable):

The consent for receiving the vaccine checkbox will appear automatically as the dose series has already been received to during their first dose. Therefore, begin by directly inputting the dosage information.

- If the client changes their consent during their second dose, uncheck the consent checkbox, then populate the "**Reason vaccine was not administered**" with the selection "**Patient withdrew consent for series**", then click "**Next**" and "**Finish**". On the client record, their status will change back to "**Dose 1 checked out**" and the "**Reason vaccine was not administered**" field will be populated.



If the Client consents, proceed to fill in the following fields:

3. If client consents to receiving the vaccine, confirm the accurate Vaccine has been selected (will automatically populate based on initial inventory selection). If the Pfizer vaccine is being used, search for the diluent available in the system in the "**Diluent Event Inventory"** field in the Pfizer Vaccine Administration screen. COVIDSHEILD, Moderna, AstraZeneca and JANSSEN products do not require a diluent, so this field will not populate.

4. **Route** will be pre-populated.

5. Select the **Anatomical Site** of vaccination from the drop down.

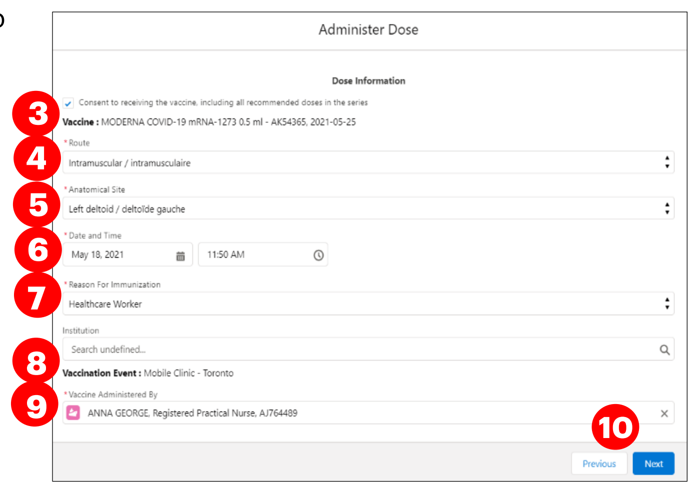
6. Input **Date** and **Time** of vaccination (defaults to current date & time). If entering a dose administration record after the vaccine has occurred, update the date and time accordingly). Date/time can be set in the present or past, but not the future.

7. **Reason for Immunization**: Auto populated based on what was entered during check-in.

8. **Vaccination Event** Auto populated based on the VE tied to the client's record.

9. Fill in the **"Vaccine Administered By"** field by searching for the provider who administered the vaccine.

10. Click **"Next"**.



Note: If the Vaccinator's name is not available as an option when searching within the "**Vaccine Administered By**" field, it is recommended to submit a request to the ITS team (more details in further context below). However, users can also search for **"Other Clinician, Other Designation, xxx"** and select it as a generic placeholder. This will trigger a second free-text field to become available below called, "**Vaccine Administered By (Other)**". The Vaccinator's details should be entered here as: [First Name] [Last Name], [Designation OR Provider Role], [Professional License].

Further Context

- If you are attempting to administer a dose to a client, your User profile's Authorized Organization must match the Authorized Organization of the inventory being administered. Otherwise, you will be unable to select it from the Dose Administration screen. The Vaccination Event on the client record must also match the VE inventory record. If you do not see any inventory values, this indicates that there is no inventory linked to the client's VE.
- Request your site lead to submit a request to Information Technology Services (ITS) for the creation of a provider not currently available in the "**Vaccine Administered By**" field. Please have the provider validated by your site lead and have the details in the table prepared prior to contacting your site lead:

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

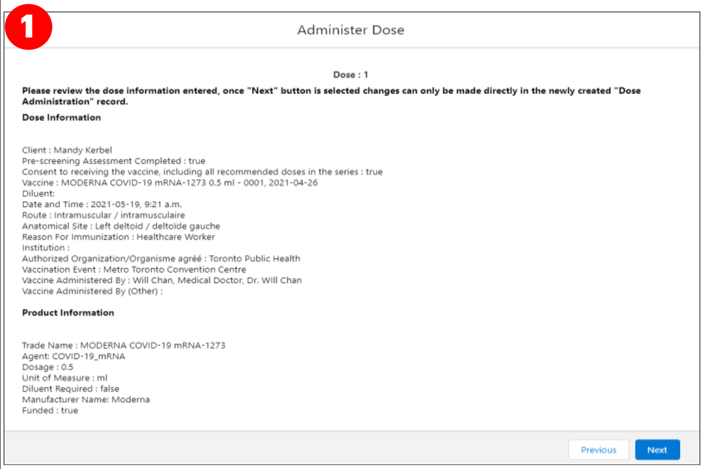
- To view a list of clients who did not have the vaccine administered, under the "**Clients**" tab, select "**Clients Not Vaccinated**" list view. This will show all clients who have a "**Reason vaccine was not administered**" value populated on their client record.
- If the client is turned away or ends up not receiving the vaccine and they return at a future date, the "**Reason immunization was not administered**" field on the client record will reset to blank when checked-in again.
- If a user is unable to administer a dose to the client and receives an error instructing them to "**Select an alternative Reason for Immunization**". This indicates that the current "Reason for Immunization" is no longer available in COVax$_{ON}$, and the user must select another option from the "Reason for Immunization" drop-down list before proceeding to administer a dose.

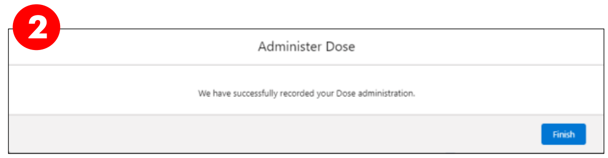
4. Review Dose Information

Description:
After filling in the dosage information, review the details and click through to complete the record.

How:
1. Review the details of the client's dose to ensure all the data entered is accurate and click "**Next**"
2. Click "**Finish**". The client's status will move to "**Dose 1 (or 2) Administered**". Ensure you do not close the window without clicking "**Finish**" as this is required to complete the client's dose administration in COVax$_{ON}$.

Note: After administering a dose and the "**Finish**" button is clicked, the inventory level in the COVax$_{ON}$ system will be automatically decremented from the AO inventory record.

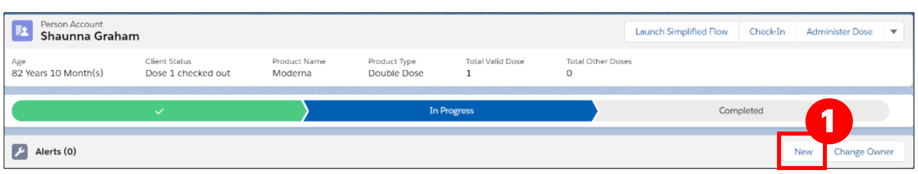


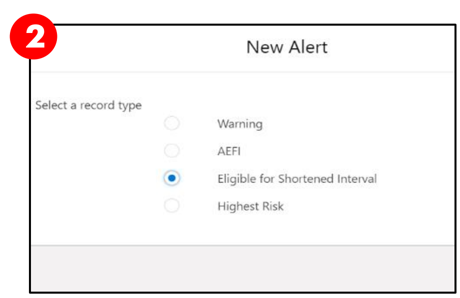


5. Add Alerts to Client Record

Description:
Vaccinators, Site Staff, and Site Super Users can enter an alert on a client's record to document any important details related to the client that would be helpful when the client returns (i.e. additional comments, any AEFI details, highest risk conditions etc.). This alert appears as a banner on the top of the client record.

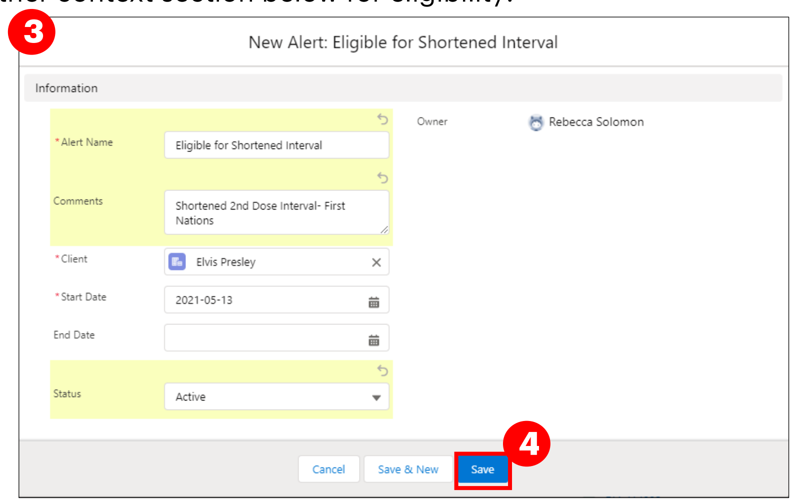
How:
1. From the client's record, in the "**Alerts**" section, click "**New**"
2. Select the alert type being created:
   - "**Warning**" may be for a client who has a fear of needles
   - "**AEFI**" may be for any specific information related to an AEFI they experienced after receiving their dose
   - "**Eligible for Shortened Interval**" may be used for clients who meet the eligibility requirements for a shortened dose interval
   - "**Highest Risk**" may be for clients considered to have a highest risk health condition





3. Populate alert fields:

- **Alert Name***: Enter the Alert Type, followed by a description. (i.e. "*Warning: Fear of Needles*" or "*Eligible for Shortened Interval*"). See further context section below for eligibility.
- **Comments**: Any additional comments about the situation. For Shortened Interval clients, "Shorten 2nd Dose Interval – 28 days – [Reason]" (i.e. Highest Risk, Indigenous Community, etc.)
- **Client**: Auto populated from the client record the alert is created from and should not be updated
- **Start Date***: Date the alert is being entered. This auto populates to the day the alert is being entered
- **End Date**: Leave blank
- **Status**: Input "**Active**" when initially creating the alert



4. Click "**Save**"

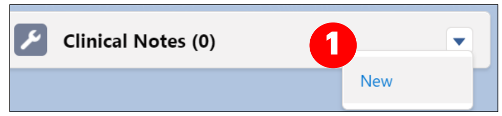
Further Context

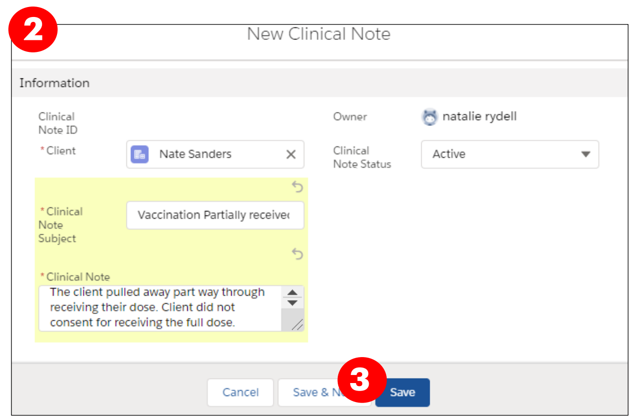
- Alerts can be viewed by all users at the top of a client record and are helpful information for determining how to proceed with the client's vaccination and confirming if they are eligible to receive the dose at an earlier interval. They are relevant for both single dose and double dose vaccines.
- The alert appears on the client record regardless of status or end date.
- The "**End Date**" field and "**Completed**" status may be added in cases whereby the alert no longer applies, for example if the client was but is no longer pregnant. Another example may be if the Vaccinator determined during the pre-screening that the client should return after certain symptoms subside and entered an alert to indicate that. The "**End Date**" cannot be set in the past.
- The "**Cancelled**" status may be added if the alert was entered by mistake.
- Users cannot delete alerts and only the creator of the alert can edit the "**Comments**"
- Clients who are eligible for Shortened Dose intervals:
  1. Long-Term Care Home, Retirement Home, Advanced Age: Community Dwelling, Indigenous Community individuals
  2. Highest Risk Clients (see below)
- The below conditions are considered "**Highest Risk**":
  - Organ transplant recipients (including patients waitlisted for transplant)
  - Hematopoietic stem cell transplant recipients
  - People with neurological diseases in which respiratory function may be compromised (e.g. motor neuron disease, myasthenia gravis, multiple sclerosis)
  - Haematological malignancy diagnosed less than one year ago
  - Kidney disease eGFR< 30
  - One essential caregiver for individuals in the groups listed above

6. Add Clinical Notes to Client Record

Description:
Users can add one or more clinical note records on the client record to summarize any important information regarding the client's vaccination

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



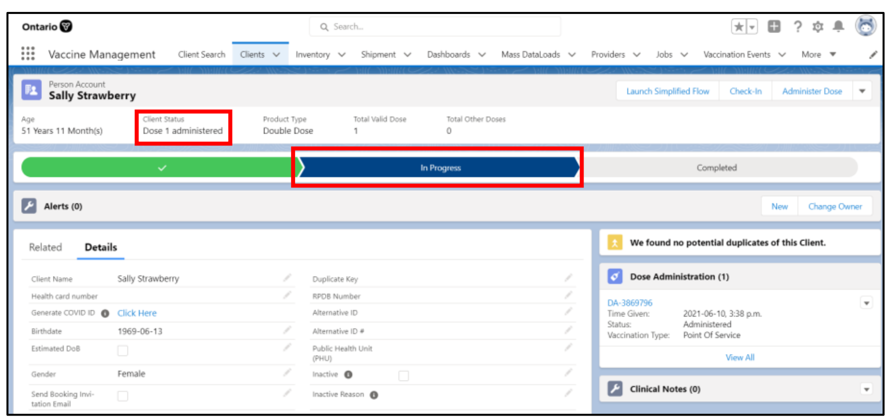


Notes:
- Clinical Notes can be created and edited by Vaccinators and Site Super Users. This free text field is limited to 5000 characters. However, the status field of a note can be edited by Site Super Users.
- "**Entered in Error**" status can be used if the note was entered by mistake, for example if entered on the incorrect client or on a duplicate client.

7. Direct Client to Monitor for AEFI

Description:
After dose administration, direct the client to monitor for Adverse Events Following Immunization (AEFI) for 15 minutes.

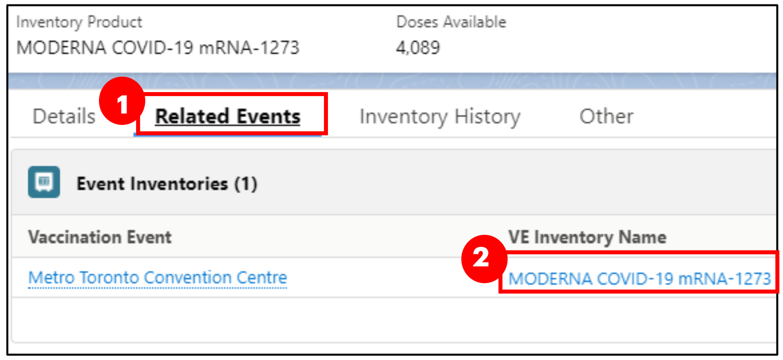
Note: if any changes are required to the Dose Administration record, refer to the "***Edit Dose Admin Records & Merge Duplicate Clients***" job aid.



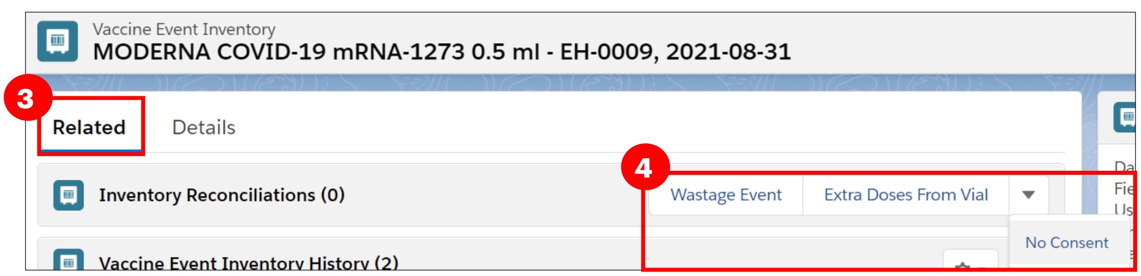
How:
1. Ensure that the client's status is "**Dose 1 (or 2) administered**". Explain the need for the client to wait 15 minutes after their vaccination to monitor for any Adverse Events Following Immunization (AEFI).
Note: In cases where a client experiences an AEFI, this will be recorded during the check-out process described in the "Check Out" *job aid*.

8. VE Inventory Reconciliations

Description:
Inventory reconciliations ensure that the inventory information within COVax$_{ON}$ is reflective of the physical on-hand inventory and there are no disruptions to the ability to vaccinate clients within COVax$_{ON}$.
Reconciliations can occur at both the AO and VE levels. Reconciliation options at the VE level are: **Wastage Events, Extra Doses from Vial** Adjustments, and **No Consent** Adjustments. For details on reconciliations at the AO level, see section 7: "**Inventory Transactions at the AO level**" above. When inventory is reconciled at the VE level, it will also be automatically reflected on the parent AO record. To document reconciliations at the VE within COVax$_{ON}$, use the following process:



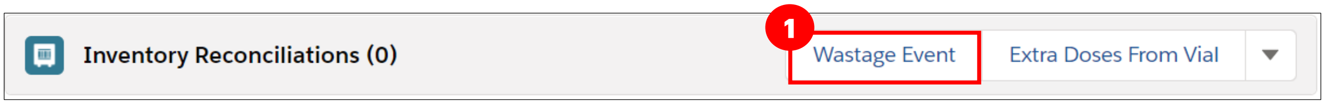
1. From the AO inventory record, select the "**Related Events**" tab.
2. Under "**Event Inventories,**" select the relevant Vaccination Event Inventory (VEI) record from the associated "**VE Inventory Name**" hyperlink. You may also click "**View All**" to see the full list of associated records.
3. From the VEI record, navigate to the "**Related**" tab
4. Under "**Inventory Reconciliations**", select the appropriate reconciliation type and follow the instructions in the below sections:
   - **8A. Wastage Events**
   - **8B. Extra Doses from Vial**
   - **8C. No Consent**



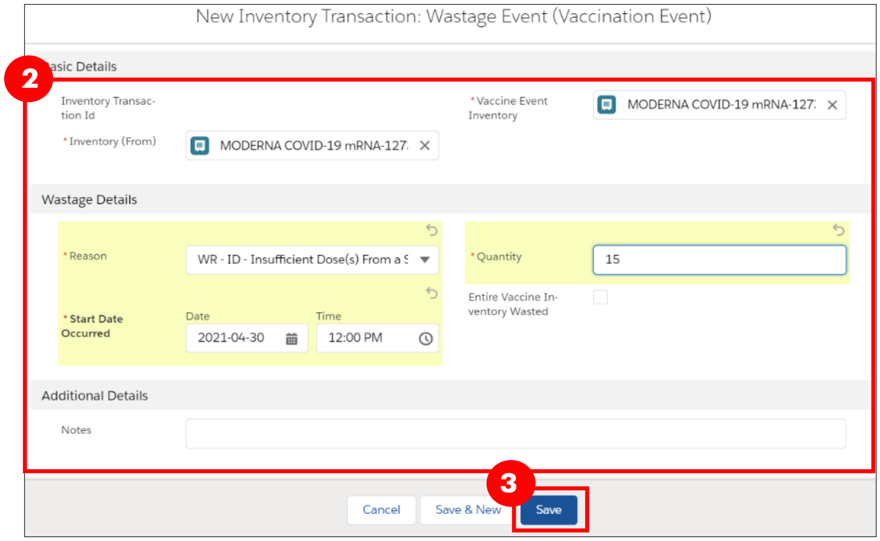
Note: Users can ***not*** edit inventory transaction records once they are created. If a transaction is unintentionally/mistakenly created, users must create 2 inventory transactions to reconcile for the mistake:
1. First, create a record to counteract/reverse the original error
2. Second, create a record for the correct reconciliation

8A. Wastage Events

Description:
For wastage events at the VE level, follow the below process. Please note, any excursion/temperature-related wastage events that occur at the VE level should be logged as a wastage event under the VE using the reason, "**Vaccine Stored Temperature Excursion at Clinic**"
1. Under Inventory Reconciliations, select "**Wastage Event**"



2. Fill in the details of the Wastage Event:



- **Inventory Transaction ID:** Unique identifier for each Inventory transaction. Auto populated once saved based on order of creation.
- **Reason*:** Select reason for wastage from dropdown list
- **Date Occurred*:** Select date and time the wastage occurred
- **Quantity*:** Enter number of doses wasted
- **Entire Vaccine Inventory Wasted:** Checkbox if the entire inventory record has been wasted. Leave unselected if only a portion of the inventory has been wasted.
- **Notes:** Input any desired notes

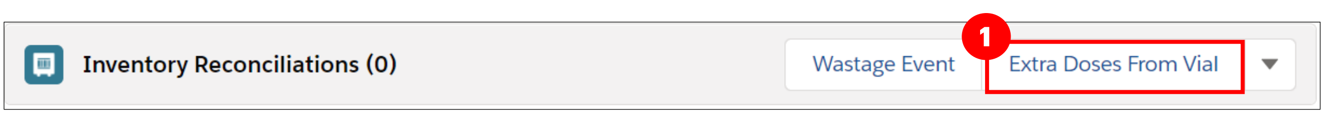
3. Click "**Save**".

Note: Wastage event reconciliations should not be created unless the inventory record is in the status "**Available**".

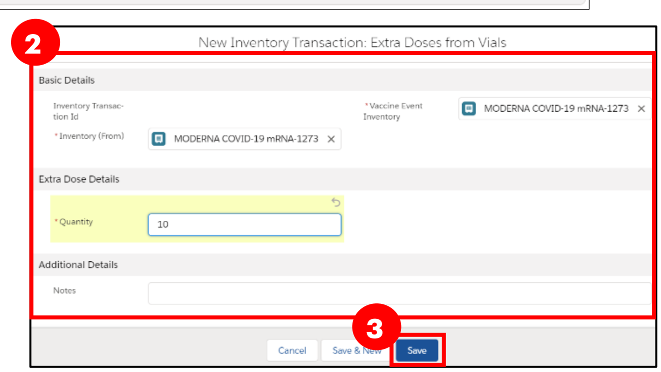
8B. Extra Doses from Vial

Description:
All inventory arrives from the manufacturer in vials. Within each vial, there is a designated number of doses yielded (i.e. for Pfizer, each vial is said to yield 6 doses). In some circumstances, extra doses from vials can be yielded (i.e. a Pfizer vial has 7 doses instead of 6). To account for this extra dose, a reconciliation must be made at the VE level. Please note this adjustment type is only available from the VE level since this is where vaccinations will physically be administered.

1. Under Inventory Reconciliations, select "**Extra Doses from Vial**"



2. Fill in details of the Extra Dose from Vial adjustment

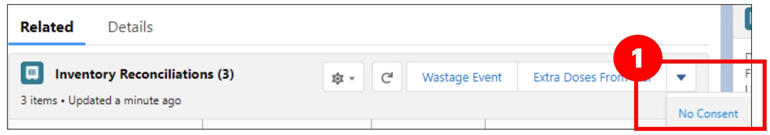


- **Inventory Transaction ID:** Unique identifier for each Inventory transaction. Auto populated once saved based on order of creation.
- **Quantity*:** Input number of extra doses from vial that have been yielded
- **Notes:** Input any desired notes

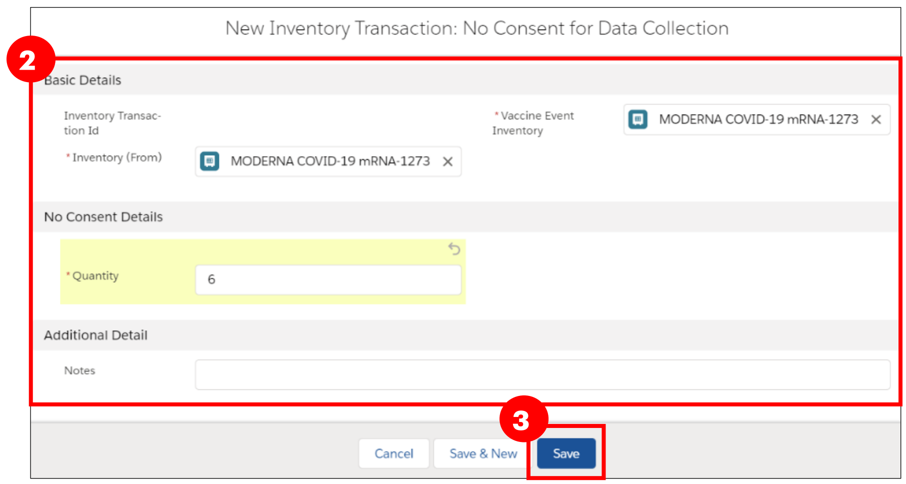
3. Click "**Save**"

8C. No Consent

Description:
When client's do not consent to data collection during the check-in process, their data is recorded in an offline paper form instead of in COVax$_{ON}$. However, since these clients do receive a dose "external" to COVax$_{ON}$, the Inventory Manager must ensure that the "**No Consent**" doses are accounted for at the VE level. To account for these doses, follow the process outlined below. Please note this adjustment type is only available from the VE level since this is where vaccinations will physically be administered.



1. Under Inventory Reconciliations, select the drop-down and select "**No Consent**"



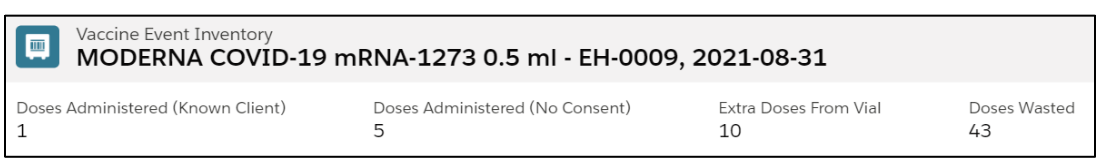
2. Fill in details of the No Consent adjustment:
   - **Inventory Transaction ID:** Unique identifier for each Inventory transaction. Auto populated once saved based on order of creation.
   - **Quantity*:** Input number of no consent for data collection doses that have been administered
   - **Notes:** Input any desired notes
3. Click "**Save**"

VE Inventory – Field Descriptions

There are numerous fields on the VE inventory record that will be updated when Inventory Reconciliations are made:

Field	Description
Doses Administered (Known Client)	Number of doses administered to clients through regular or simplified flow process in COVax$_{ON}$ at the specific VEI
Doses Administered (No Consent)	Number of "No Consent" Inventory Reconciliations made on the specific VEI
Extra Doses from Vial	Number of "Extra Does from Vial" Inventory Reconciliations made on the specific VEI
Doses Wasted	Number of "Wastage" Inventory Reconciliations made on the specific VEI

- The status bar on the VEI screen shows the cumilative number of transactions for the Vaccine Event Inventory



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.