COVaxON Client Check-In Job Aid

Target Role: Check In Clinician / Admin

Role Description:

Records client information and checks client into COVaxON system

Permission Level: COVax Site Staff

- Client Search Ability
- Edit-Access for Client Profile
- Read-Only Access to Administer Dose Functionality
- View Dashboards
- Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report

Legend

Pencil Icon
Click this to edit any data fields

Red Asterisks
Indicates a required field

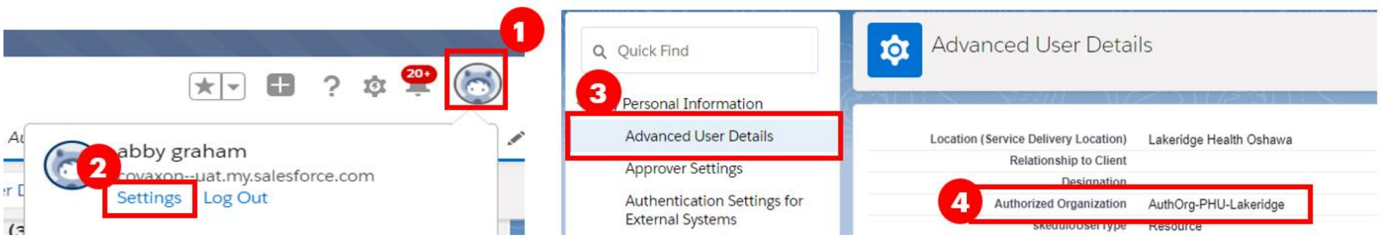
All COVID public health measures must be followed in alignment with this process.

User Access with new AO & VE functionality:

- There are no restrictions to Site Staff being able to check in clients All Users can create and manage Vaccination Events associated to the same AO as their profile AO based on their AO
- Site Staff checking out clients must have the same AO on their profile as the AO of the last dose administered (refer to Check Out job aid for more details)

There have been signficant changes to the process for searching clients and updating their profiles based on the data model design enhancements for Release 5.2. Refer to the "R5.2 COVaxON Functionality Changes" Document sent on February 25th for an end to end overview of these changes.

To check your Authorized Organization, go to Advanced User Details:



For assistance, contact Information Technology Services (ITS):

- (416) 327-3512
- Toll Free 1-866-272-2794
- COvaxonsupport@ontario.ca
- Support hours are 7:00am to 8:00pm, 7 days a week

This document provides training on how to use the COVaxON system for the vaccine management process. Within the clinical package that each site received, there are additional forms and documentation that you will need to use alongside the COVaxON system.

Data Privacy Disclaimer:

Users with access to COVaxON can see the demographic details and health numbers 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.

The system records detailed audit transaction logs that inform the Ministry of Health 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.

Client Record Best Practices

Site Staff must ensure that Client records are fully accurate and have all of the required information to ensure clients identities can be properly validated along the process.

- Fields that must be populated are:
  - Last Name
  - Gender
  - Date of Birth
  - AT LEAST ONE of: 1) Postal Code 2) Home/Mobile/Work Phone
  - Vaccination Event: the location the client is being vaccinated at. Clients must have Vaccination Events on their profile as this drives the linkage to the inventory administered the client, information on the dose admin record, information on the proof of vaccination receipt, etc.

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- Highly Encouraged Client Information Fields are:
  - Health Card Number (10-digit number only). This is the best defense against creating duplicate clients and validating client identify to avoid activities being conducted on incorrect client profiles. If a client does not have a Health Card number, it is encouraged to request an "Alternative ID" (i.e. drivers' licence, passport, birth certificate, etc.) to verify their identity.
  - Primary Care Provider field: If possible, this field should be populated on the client profile.
  - Institution field should be populated with the LTCH/RH name for residents and staff if that is the client being uploaded. This field should only be used for LTCH/RH residents and staff to improve traceability.
- The Public Health Unit (PHU) field will be populated based on the postal code entered for the client *(i.e. if the client resides in Toronto, their PHU will be Toronto Public Health)*
- Sociodemographic Data: This data should be requested from all clients and populated when the client consents.

Shift Begins

1. Upon arrival, obtain clinic iPad for use
2. Unlock iPad (see on-site support staff to obtain unlock code)
3. Go to the 'COVaxON' Icon on the iPad (red background with white needle)
4. Login to your COVaxON account using your username and password credentials (refer to Login, Logout, User Settings job aid for detailed steps) ***Note:*** *do not save your password on the iPad as these are shared devices*
5. Approve the Two-Factor Authentication request on your mobile device to complete login

High Level Check-in Administration Process

1. Client arrives at the Clinic	**2. Locating Client Records in COVaxON**	**3. Creating a New Client Profile in COVaxON**	**4. Client Consent and Check-In**	**5. Gathering Additional Client Information**	**6. Gather Socio-demographic information**	**6. Direct the client to the waiting room**
Client will arrive at the clinic and will have completed their COVID-19 assessment	Search for the client in the COVaxON system and ensure that they are on the registrant list	If you cannot find the client in the system, and therefore they are not on the registrant list, follow the walk-in approval process	If they are found in the system and therefore are on the registrant list, check the client in, requesting data and communication consent	Once the client is checked in, ensure all mandatory fields are populated and add any additional information	Gather additional socio-demographic data on the client profile	Once the client is successfully checked in, direct them to the waiting room

Note: For Long Term Care Homes (LTCH), Retirement Homes (RH) and Nursing Homes (NH), the process above can be slightly different for each location based on their process and division of roles. For example, the client profile in most cases will be pre-validated, and consent captured prior to the date of vaccination. Specific nuances for LTCHs, RHs and NHs are captured in the key context sections below.

Vaccination Events are created prior to vaccinations taking place at a designated location as part of the planning phase. Refer to the Creating Vaccine Events job aid for details on how this is done. Please note that all historic SDLs were mapped to new Vaccination Events and therefore already exist within the system and therefore do not need to be re-created as Vaccination Events.

1. Client Arrives at the Clinic

COVaxON Client Check-In Job Aid

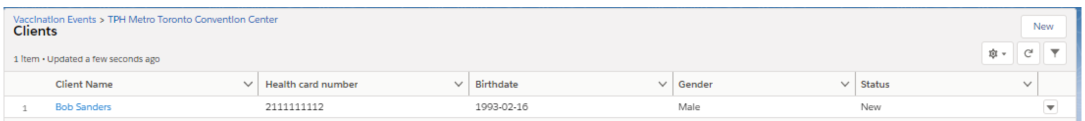
Target Role: Check In Clinician / Admin

2. Locating Client Records in COVaxON

Description:

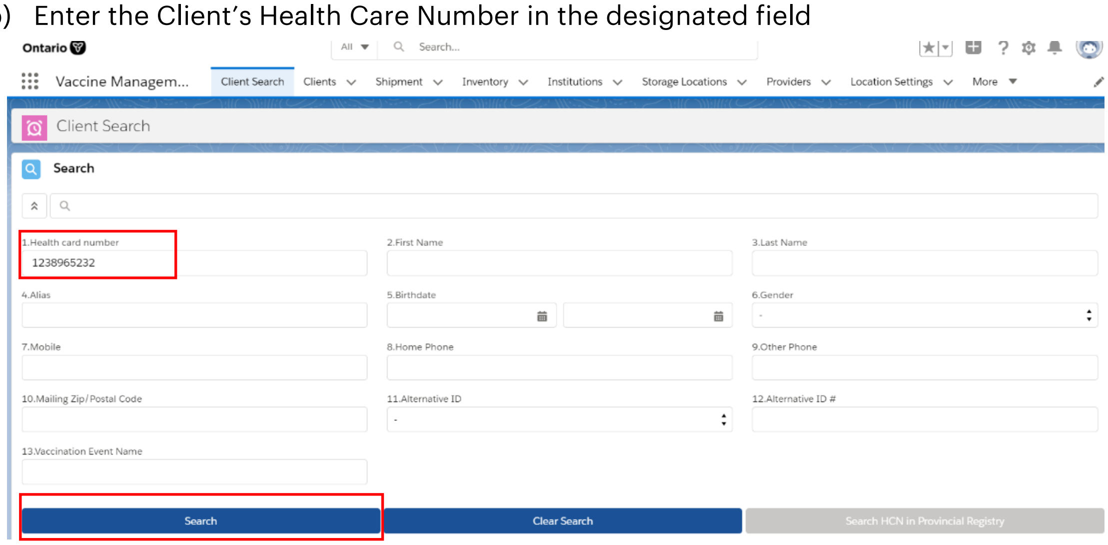
Once the client arrives at the check in station, verify that they have completed the COVID-19 assessment prior to entering the clinic. Then follow the steps below to locate the client record in COVaxON. Note: When using the search bar to populate a field, hit the "**Return**" button on the iPad keyboard to populate results.

1. **Search for the clients through the Vaccination Events tab:**
   a. Select "Vaccination Events" Tab.
   b. Select "Organization's Vaccination Events" from the list options to see all vaccination events within your AO
   c. Select the Vaccine Event
   d. Scroll down to see a list of clients tagged to this Vaccination Event. Select "View All" to see further details
   e. Select the filter icon

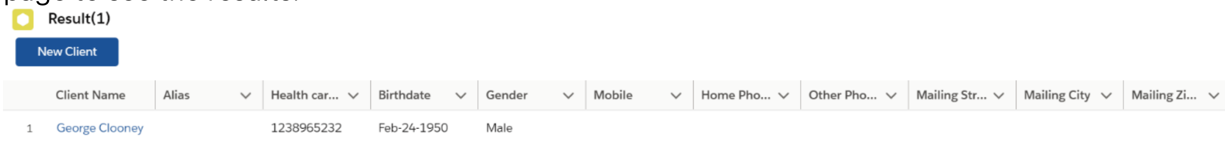


   f. Enter the relevant filters. For example:
      i. Enter client name
      ii. Enter client HCN
      iii. Filter clients by status
   g. Select "Apply"
      - Note: if the search needs to be modified, the filters must be removed before applying new filters. Do this by selecting "Clear All Filter" and "Apply"

   h. Click on the desired client name to bring you to their profile page and follow the steps in ***section 4: Client Consent and Check In***.
   i. If client does not exist after searching under the "Vaccination Events" tab, then proceed to step 2 immediately below.
2. **Searching for the client using the Clients Search tab:** If you are unable to locate the client within the Vaccination Events tab, it implies that the client is not associated to that Vaccination Event and the client will not be visible from the "Vaccination Events" tab. Users should attempt to find the client through the Client Search tab using the following steps:
   a) Go to the "Clients Search" tab
   b) Enter the Client's Health Care Number in the designated field



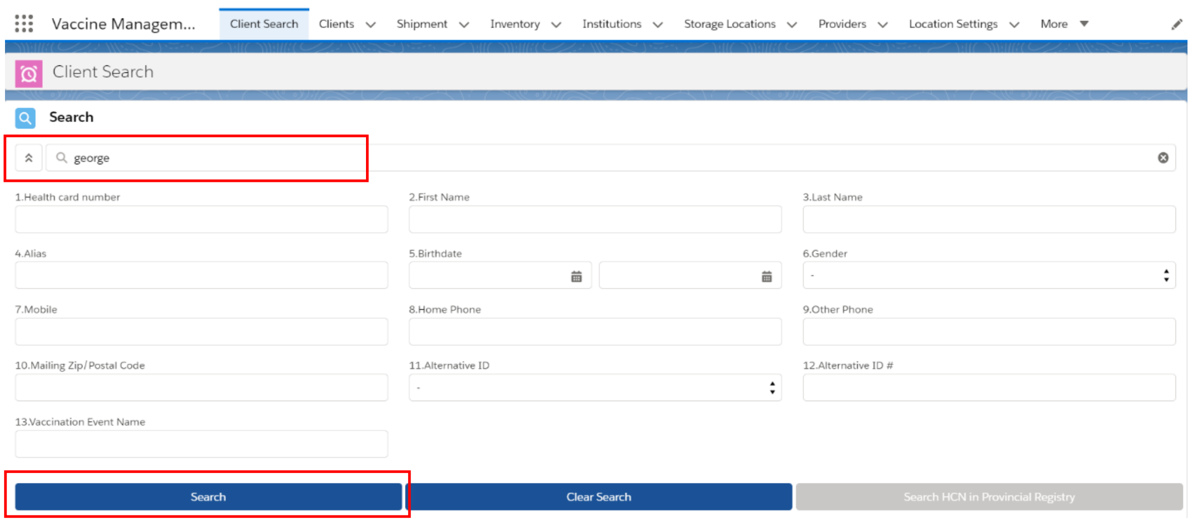
c) Select “Search”. If there are results produced, they will be populated below. Scroll down on this page to see the results.



d) Select the desired client’s name to bring you to their profile page and follow the steps in ***section 4: Client Consent and Check In.***

e) If the client does not exist after searching their health card number, or they do not have a health card number, use the following steps:

   i. From the same “Client Search” tab, enter any key identifier of the client in the search fields (i.e. search for first or last name, date of birth, etc.)
      - It is recommended to search by 1 criterion (i.e.: last name) in the client search bar as opposed to multiple. This will return the most accurate results.
      - The global search field at the top will find partial matches, whereas the specific fields must be exact.



   ii. Select “Search”. If there are results produced, they will be populated below. Scroll down on this page to see the results.

   iii. Select the desired client’s name to bring you to their profile page and follow the steps in ***section 4: Client Consent and Check In.***

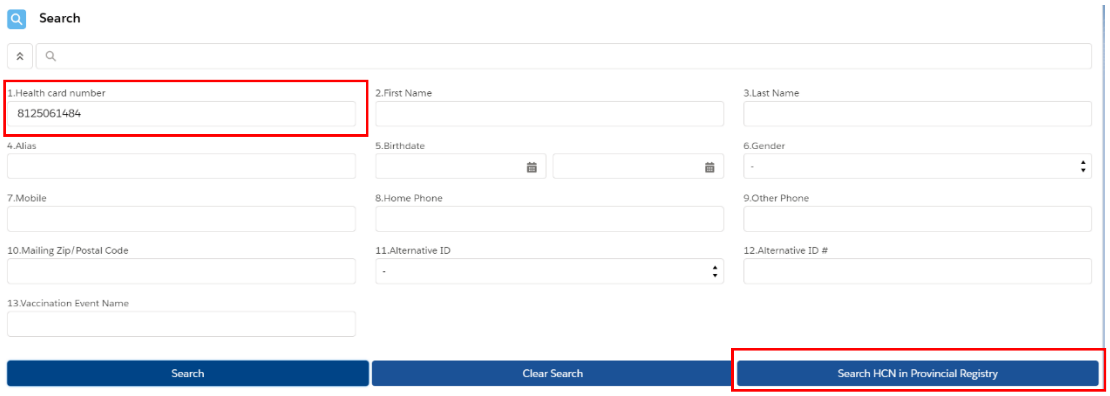
   iv. If the client does not exist after searching for any key identifier, proceed to step 3 immediately below.

3. Searching for a client using the Registered Patient Database (RPDB):

a) From the Client Search tab, re-renter the client’s health card number in the designated field and click “Search”. Since this number has already been searched (step 3b above) and it should not return any results, and the “Search HCN in Provincial Registry” button will be come available for selection (this button was previously greyed-out).

COVaxON Client Check-In Job Aid

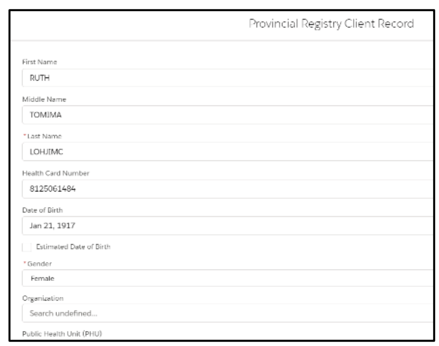
Target Role: Check In Clinician / Admin



b) A window will appear, and the searched health card number will be auto populated. Click "Next"

c) If there is an exact match with the health card number in the database, a client record will appear with the details from the Registered Person Database. If there is no exact match for the client's health care card found in RPDB, a pop-up message will display. You may select the "Previous" button and modify the health care number if there was a mistake.

d) If the record is still not appearing, the client does not exist in RPDB. See ***section 3: Creating a New Client Profile in COVaxON*** for details on manual client creation.



e) Review the client details and add any additional details to be populated on the client record.
- Note: please do not fill in the following fields:
  - Estimated Date of Birth (checkbox)
  - Institution
  - Public Health Unit

f) Then click "Next", then "Finish". The client will then be added into COVaxON and can be found by searching from the "Client Search" tab. Follow ***section 4: Client Consent and Check In.***

g) On the client's profile, the "RPDB Number" (external ID of the client within the database) field will be populated for traceability.

Further Context

- For LTCHs/RHs, the client profiles will be pre-validated, and consent captured in the system prior to the date of vaccination. There is likely no check-in area since clients will likely be vaccinated in their individual rooms. If the vaccinator is not an employee of the LTCH/RH, they will work with the location staff to gather any client details required.

COVaxON Client Check-In Job Aid

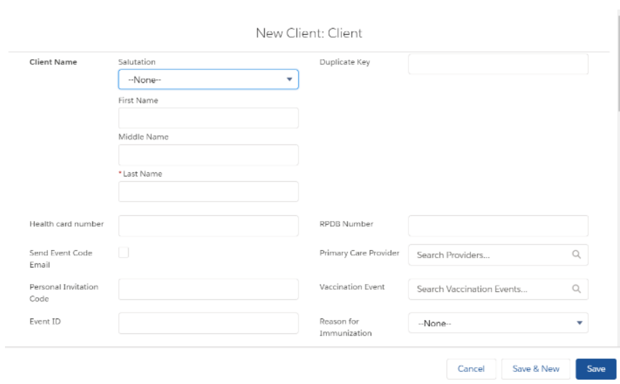
Target Role: Check In Clinician / Admin

3. Creating a New Client Profile in COVaxON

Description:
If the client cannot be found using any of the steps in section 2 above, their profile can be manually created by a COVaxON user. Please refer to the established clinical processes for approving new clients within your clinics protocols for more information on the approval process for walk-in clients. If the walk-in client is approved, please follow the steps below for manual client record creation.

1. From the "Client Search" tab, select "New Client"
    - ***Note****: if you are having trouble selecting the "New Client" button, type an identifier into one of the search fields, click "search" and then you can select "New Client"*

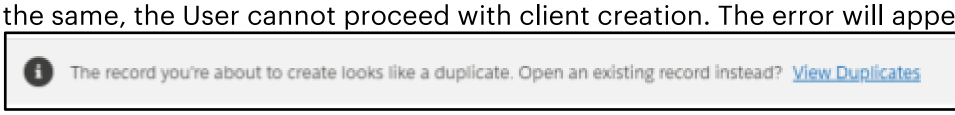
2. A new client information window will open. Proceed to fill in client information
    - ***Note****: It is best to capture as much client data as possible. Details can be found in the "Client Record Best Practices" section at the top of this document*
    - ***Note****: duplicate client entries may be detected in the system, refer to the "Further Context" section immediately below for more details.*



3. Select "Save". You will be brought to the client record. Follow ***section 4: Client Consent and Check In***

Further Context

- Any fields that were entered when searching for the client that returned no results, will be auto populated in the New Client creation window.
- Refer to the "Client Record Best Practices" at the beginning of this document
- Client consent checkboxes will be populated during the check-in process, and do not need to be completed during this stage.
- There is logic in the COVaxON system to determine if a duplicate client record is being created. When a duplicate is detected a warning message will pop up, however Site Staff and Vaccinators can bypass this error and continue with client creation, as long as the Health Card Number is not the same. If the HCN is the same, the User cannot proceed with client creation. The error will appear as follows:



  After receiving this error, users can click "View Duplicates" to see the other client profiles in the system for comparison. It is highly encouraged that Users ensure that they are not in fact creating a duplicate client. If the user clicks "Open This Client" they will be brought to the original client's profile (note: opening the client's profile will exit the new client window without saving the details that have been entered). Once the user exits the "View Duplicates" window, if the User still wishes to continue with client creation, they can enter the client details and select the "Save" button on the "New Client" window and the client will be created in the system.

COVaxON Client Check-In Job Aid

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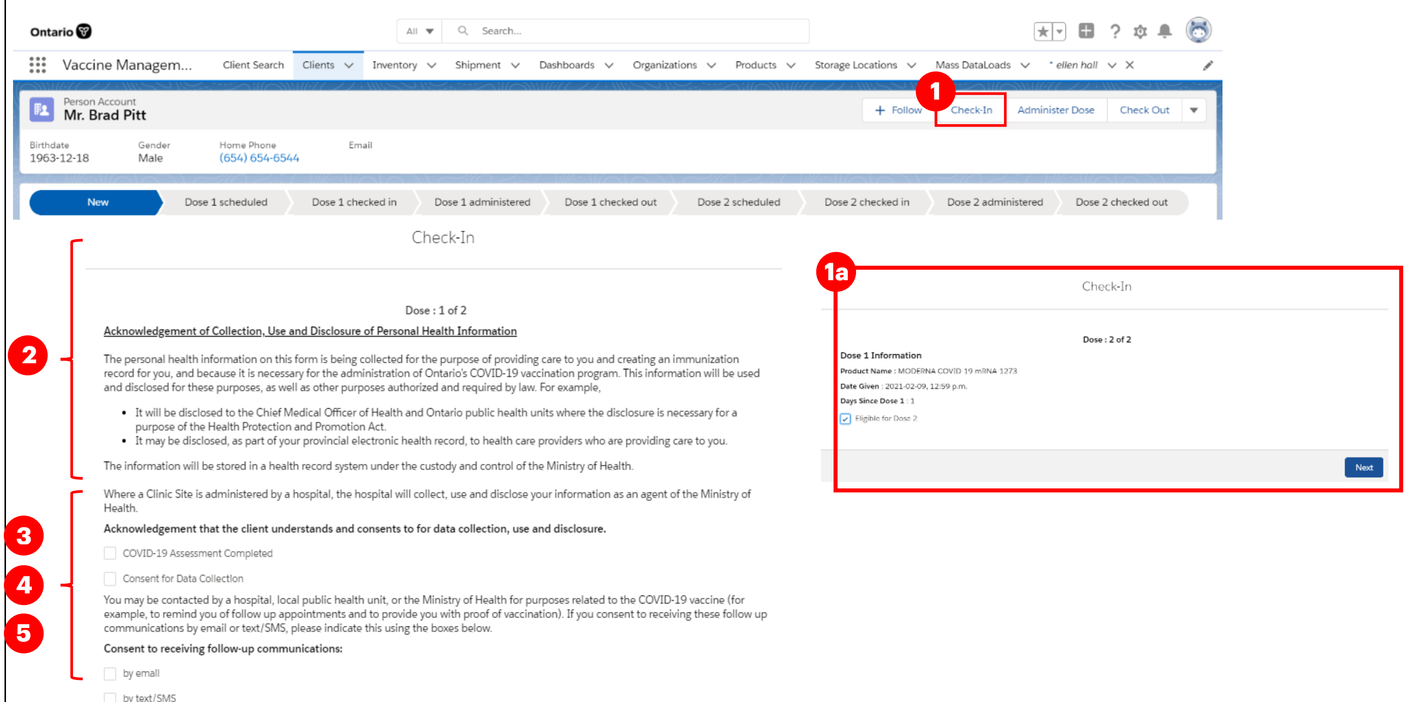
- If users detect a duplicate but the system does not, there is another method to merge client records, involving a duplicate key. Please see the ***Edit Dose Admin & Merge Duplicate Clients*** job aid for more details on this
- A duplicate client will be detected in the system if **there is an exact match on the health card number**, or a **combination of other demographics**:
  - Name match on 2 or more of First Name (exact or fuzzy), and Last Name (exact or fuzzy), and **ONE OF:** Date of Birth (exact match), Postal Code (exact match), OR Phone number (home, work, mobile, other) (exact match). Th*e phone number* ***and the phone type*** *must match (will not cross references across different types)*
- **Note:** a fuzzy match means that the name is similar, but not exact. For example, short forms of names such as "Matt" instead of "Matthew". Although, fuzzy matches for French names will not be detected.

4. Client Consent and Check-In

Description:

Once client profile has been opened, proceed with obtaining client consent and checking in.



How:

1. From the client profile, select the "**Check-In**" button on the top right.

1a. When checking in Dose 2 clients, the screen above (1a) will appear before step 2. Review the first dose information, carefully review the product that was given for dose 1, ensure adequate days have elapsed since first dose, and check the box that they are eligible for second dose. Select "**Next**".

2. Read disclosure statement out loud to the client. You may also find this disclosure statement in the clinical package to print out and post on-site if needed.

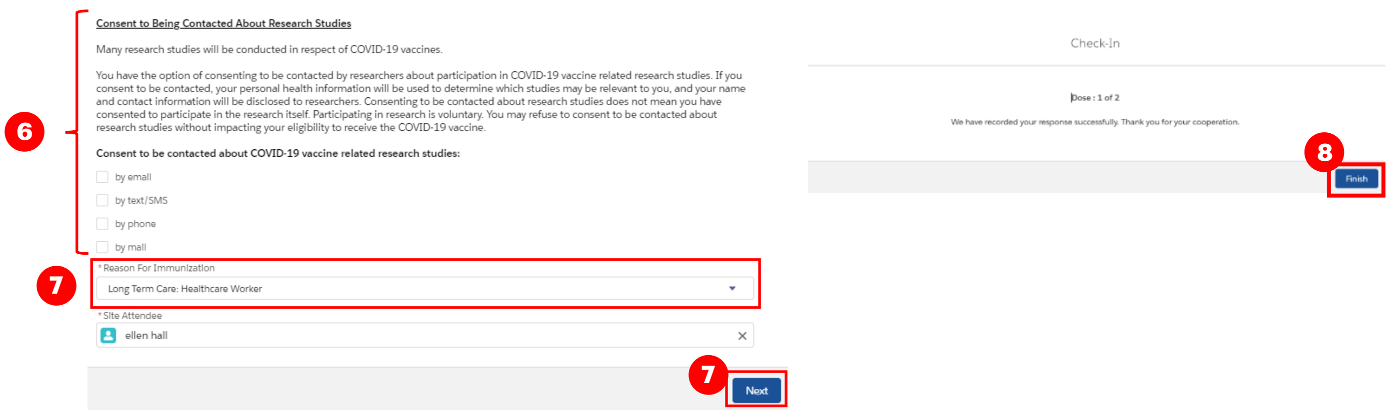
3. Ensure COVID-19 assessment has been completed and check the box. **This is a mandatory checkbox.**

4. Confirm consent for data collection: check the box for "yes", or if the client does not consent, follow the offline paper process outlined in the clinical package.

COVaxON Client Check-In Job Aid

Target Role: Check In Clinician / Admin

5. Confirm consent for follow-up communication via email/SMS: check the box for “yes”, leave blank for “no”



6. Confirm consent to being contacted about COVID-19 vaccine related research studies: check boxes for “yes”, leave blank for “no”. Options for communication include email, SMS, phone, mail.

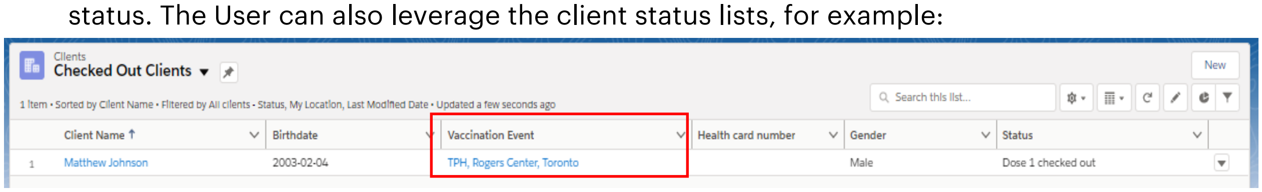
Note: Clients will receive a status update email when they: 1) Opt out of follow up communications or 2) Opt out of research communications. In addition, if clients opt into research communication emails, they will receive an email with a link to participate in CANVAS research (this only applies during their first dose).

7. Select a **Reason for Immunization** from the dropdown. Do not leave this field blank. Select “**Next**”.

8. In the next screen, select “**Finish**”.

Further Context

- It is very important to ensure that clients are successfully checked in. If not, the Vaccinator will not be able to Administer a Dose until they’re checked in. “**COVID-19 Assessment Completed**” checkbox verifies that the client has completed their COVID-19 pre-screening before entering the clinic. This is a mandatory checkbox.
- “**Consent for Data Capture**” checkbox indicates if the client is comfortable with their personal data being entered into the COVaxON system. This is not a mandatory checkbox. However, if the client does not consent, no further data should be entered in the COVaxON system and the offline paper process should be followed for vaccination (refer to the Offline Process in Module 1 section 5 of the “End to End Job Aid” for more details on this).
- “**Consent for Email/Phone/SMS Communications**” checkboxes indicate if the client would like to receive communications through email, phone or SMS. This is not a mandatory checkbox. (Note: If a client decides to opt out of this, they will receive an email with the update.
- “**Consent to receiving communications about COVID-19 vaccine related research**” checkboxes indicate if the client is comfortable receiving research information via email or text/SMS. This is not a mandatory checkbox.
- All changes to consent are documented in COVaxON under the client’s “Person Account History”
- The information entered on this check-in screen (checkboxes and “reason for immunization” drop down) will be automatically populated on the client profile page
- All of the list views from the “Clients” tab can also be used as per normal process to find clients within a specific list such as a list by status. The lists have been updated to allow users to see clients associated to Vaccination Events within the Users Authorized Organization.
    - **“Clients at my site”** will contain all clients associated to the VE within the Users AO, regardless of status. The User can also leverage the client status lists, for example:



COVaxON Client Check-In Job Aid

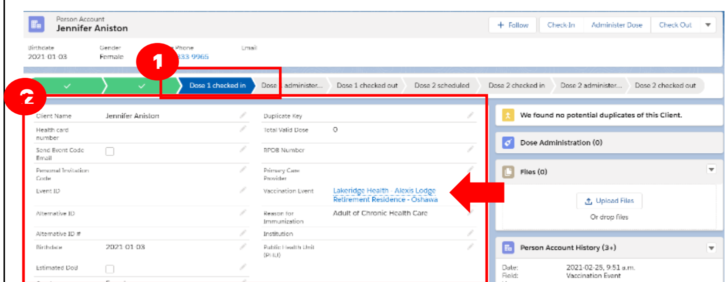
Target Role: Check In Clinician / Admin

5. Gathering Additional Client Information

Description: Once the client is checked-in, review/update any missing information on the client profile and ensure they are tagged to the correct Vaccination Event.

How:

1. On the client profile, ensure the client's status is on "**Dose 1 checked in**" (or dose 2 if applicable)
2. Using the pencil icon, edit search fields to ensure mandatory information is filled in and add any additional information *(details on mandatory information are below)*.
3. Ensure that the client's Vaccination Event has been populated. If the field is blank, use the pencil icon to update and search for the relevant VE.
4. Direct client to waiting room



Further Context

- Refer to the Client Record best practices section at the beginning of this document
- It is very important to ensure the client is tagged to the correct Vaccination Event. Although the system will not prevent users from checking in clients at the incorrect VE, later in the client flow the Vaccinator will not be able to administer the dose if the client's VE is incorrect.
- It is important to ensure the client has been properly checked in and their profile is in the "Checked-In" status before directing them to the vaccination station, otherwise this will interfere with the ability to vaccinate the client.
- "Reason for Immunization" field on the client profile is auto populated based on selection in check-in pop-up window (the previous step)
- For LTCHs/RHs, the email added to the client profile can be the email of a substitute decision maker or location directory email since the record of vaccination will be filed with client records.
- 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.

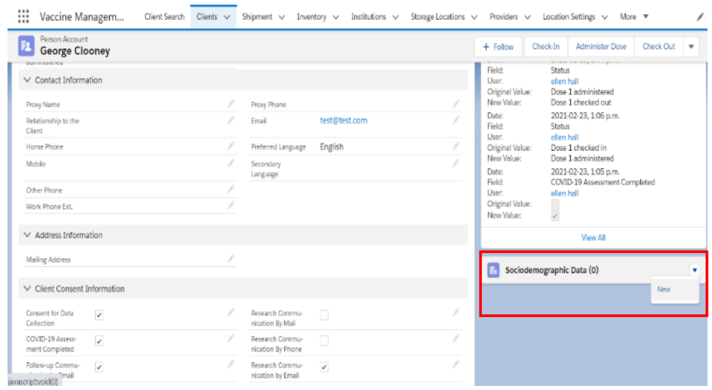
6. Gather Sociodemographic Information on Client Profile

Description: After the client has been checked in, and they have provided consent for data collection within COVaxON, users should ask the client if they are willing to provide Sociodemographic information on the client profile. Use the following steps to populate data on the client profile. All users can add sociodemographic information except for Inventory Managers.

COVaxON Client Check-In Job Aid

Target Role: Check In Clinician / Admin

How:

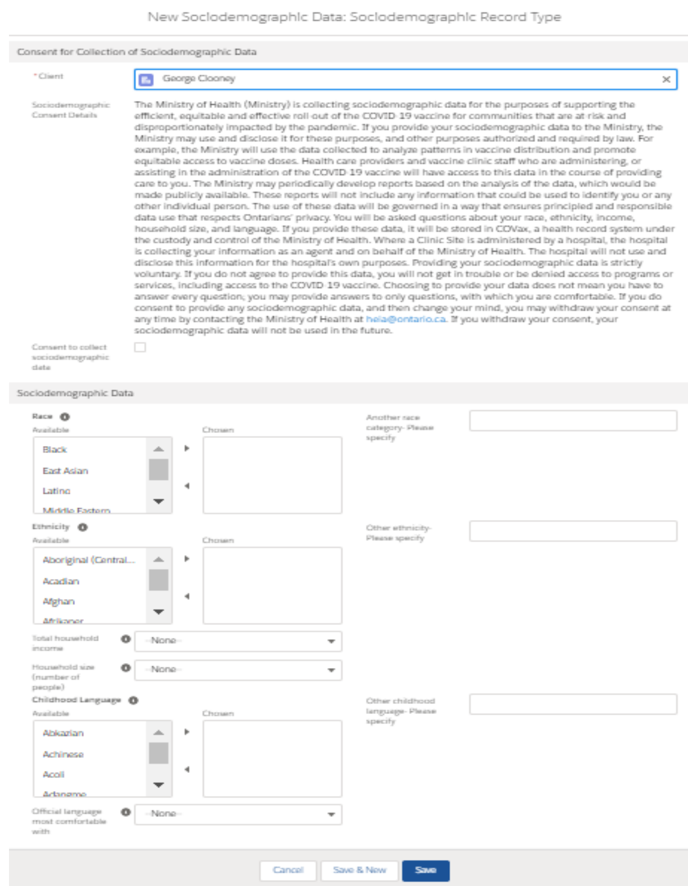


1. Go to the desired Client Profile and scroll down to the "Sociodemographic Data" section and select "New"

2. Read the disclaimer to the client and fill in the fields below:

- **Client:** Auto-populated based on the client record selected
- **Consent:** Client must provide consent for the user to record sociodemographic details about them
- **Race:** Select from the available options and use the right arrow to "Choose" the option or use the free text field if needed. The left arrow can be used to move items out of the "Chosen" box.
- **Ethnicity:** Select from the available options and use the right arrow to "Choose" the option. The left arrow can be used to move items out of the "Chosen" box.
- **Total Household Income:** Indicate Value from dropdown
- **Household Size:** Indicate the number of people in your household
- **Childhood Language:** Indicate the language you first learned and still understand from the options listed or use the free text field if needed.
- **Official Language:** Indicate which of the Canadian official languages you are most comfortable speaking

3. Select "Save" to save the information on the client record.



Further Context

- Users can edit the Sociodemographic record by selecting the drop down and "Edit". Users cannot delete a Sociodemographic record from the Client Profile.

Shift Ends

6. Client Proceeds to the Waiting Room

1. Once shift is complete, log out of COVaxON (refer to Login, Logout, User Settings job aid for detailed steps)
2. Open iPad settings and clear cache (refer to Login, Logout, User Settings job aid for detailed steps)
3. Sanitize iPad in accordance with clinic protocols