COVax_{ON} Comprehensive Login, Logout, User Settings

Target Role: *All users of COVax_{ON} (Inventory Administrator, Clinician/Admin, Waiting Room Clinician & Vaccine Administrator)*

Activity Description: This job aid outlines how to set up a new user profile within the COVax_{ON} Salesforce system, how to log in and out of the system and how a user can view their Authorized Organization. **Notes:** • There are 2 versions of this job aid. This is the more comprehensive one. If needed, please refer to the concise one for a summarized view. • COVax_{ON} accounts time out after 30 minutes of inactivity. However, iPad configuration settings may be set to log out before 30 minutes, and this will exit your Salesforce Account. This can manually be changed on the individual iPads or the service desk can be contacted.	(!) ***All COVID public health measures must be followed in alignment with this process.*** This document provides training on how to use the COVax_{ON} 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 COVax_{ON} system.
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	If you have **previously logged into and authenticated Salesforce**, and are now logging into a **new environment** for the first time, **proceed to steps 9-16**

This Job Aid Includes Steps for:

Setting up Two Factor Authentication for COVax_{ON}

Logging In to COVax_{ON}

Logging Out of COVax_{ON}

User Access based on Authorized Organization

🔒 **Two Factor Authentication Process for COVax_{ON}:**

1) On the provided iPad, open either **Safari, Google Chrome or Microsoft Edge** browser applications.

   (**Note**: *Any of these 3 browsers are recommended to access COVax_{ON}*)

2) Using the search bar, enter the URL of your email provider (i.e. Gmail, UHN, Outlook, etc.)
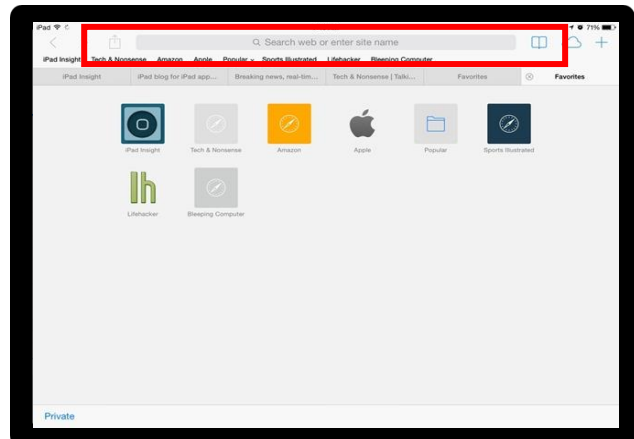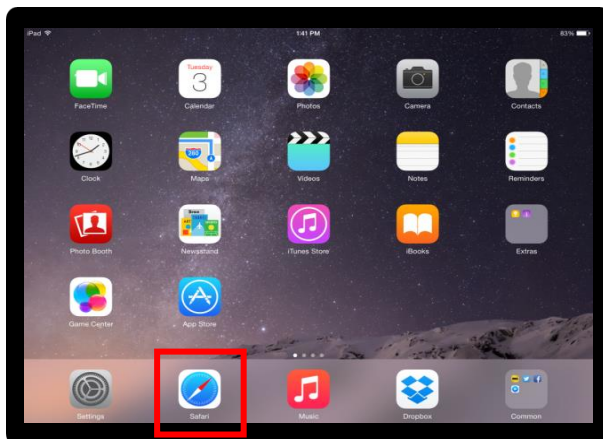

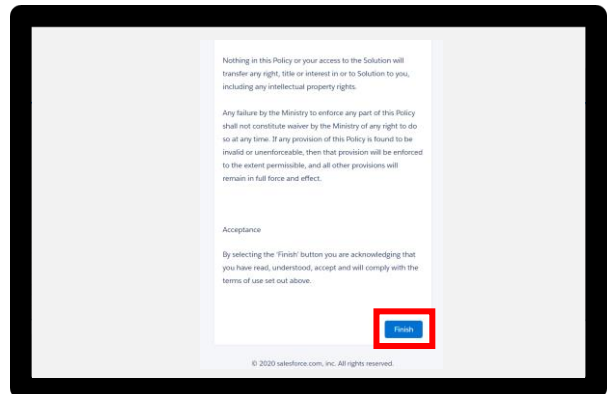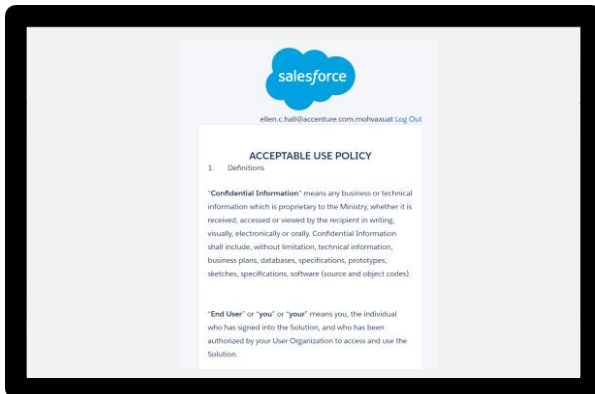3) Log into your email account.

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4) You will have one of the following emails from support@jp.salesforce.com. For the first email, copy the link in the email and paste it into a separate browser window (Safari/Chrome/Microsoft Edge). If you received the second email, right click the "verify account" button, select "Copy Hyperlink" and paste this URL into your browser.
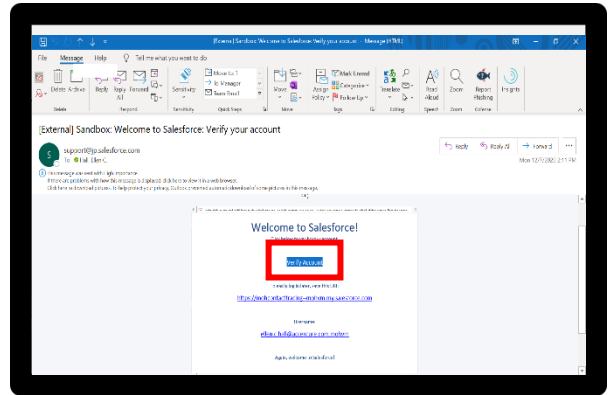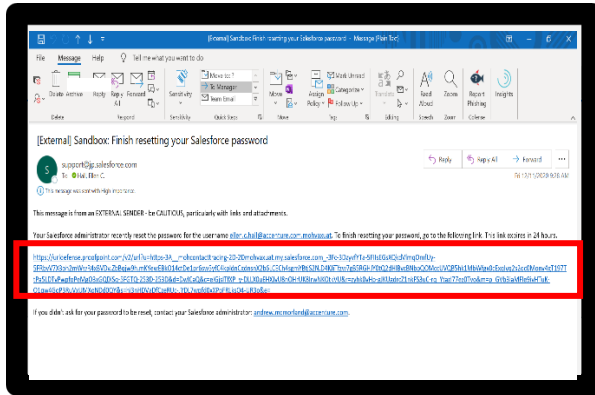

5) Once the link is pasted in your browser, hit enter to go to the URL
6) You will see the "Acceptable Use Policy". Scroll down to read through the policy. To agree to the terms, click the "**Finish**" button at the bottom.

7) You will be directed to this screen. Do not exit this window. **Set the iPad aside and grab your mobile phone.**
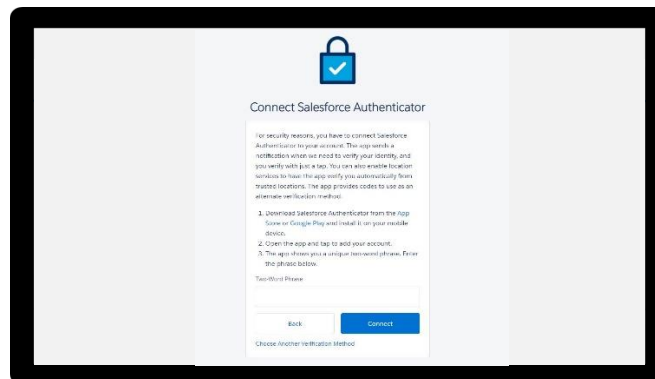

8) **On your mobile phone**, open either the Google Play (for Android or Pixel) or Apple App Store (for iPhone). ***Note****: if you have already gone through the registration process on the Salesforce Authenticator app, and see a 2-word phrase, skip to step 17 to add a new account.*
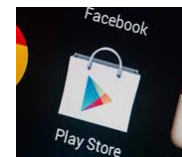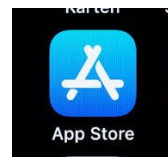
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9) Using the search bar, type in "**Salesforce Authenticator**". Click on the title "Salesforce Authenticator"
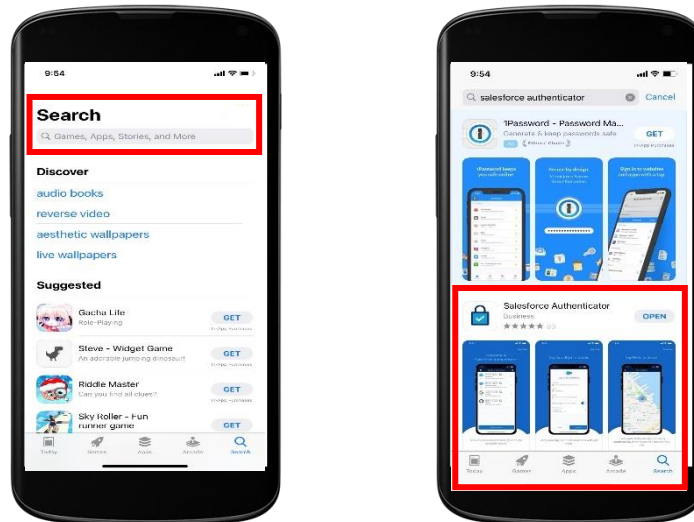
10) Select "**Get**". You may have to enter your Play Store / App Store credentials here.

11) **On your mobile phone**, open the Salesforce Authenticator app.

12) When asked if you allow this application to send notifications, select "**Allow**".

13) Click "**Skip Tour**" at the top right corner of the screen.

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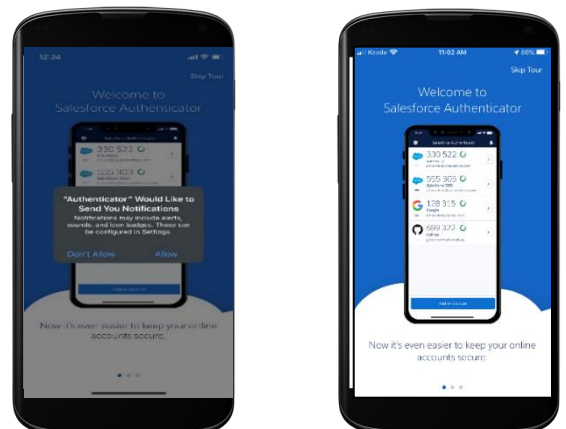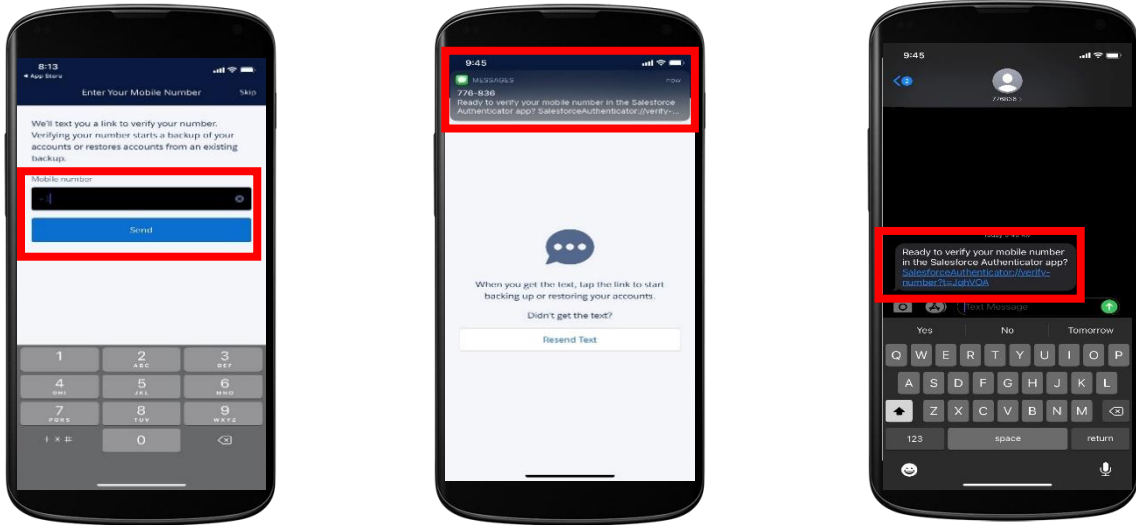
14) Enter your mobile phone number using the keypad. Click the "**Send**" button to have Salesforce send you an automated SMS message.

15) Wait to receive an automated SMS message from Salesforce. Once you have received the SMS message, **open the message**. **Click the link** that is provided.


16) Once you click on the link, this window will open on your mobile phone. **Choose a 4-digit passcode**, and then **verify** that passcode by entering it in a second time.
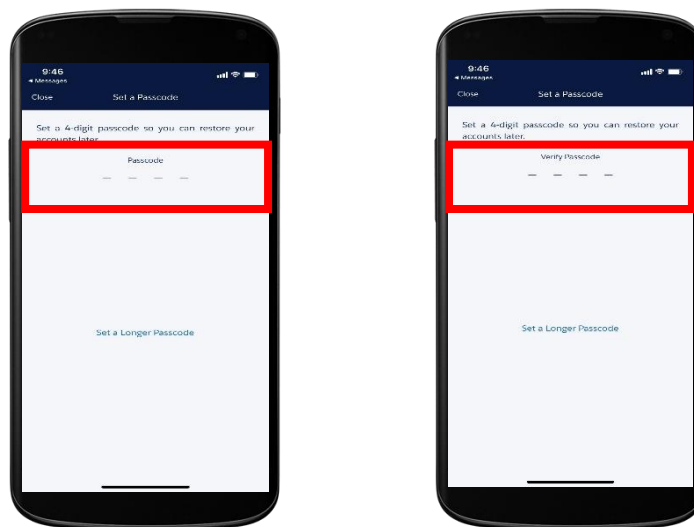
# COVax_{ON} Comprehensive Login, Logout, User Settings

17) You will see a green message at the top of your screen indicating that the passcode has been saved. Click the "**Add an Account**" button to continue. *Note: if you have already gone through the registration process on the Salesforce Authenticator app, and you are logging into a new environment, you can start here to by selecting "**Add an Account**"*
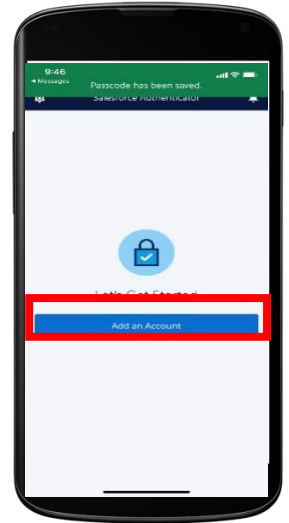
18) On your mobile within the Salesforce Authenticator app, you will see a **two-word phrase** provided.

19) **Put your mobile phone down. Using the iPad**, go back to the Safari window from step 7. Enter the two-word phrase in the box below.
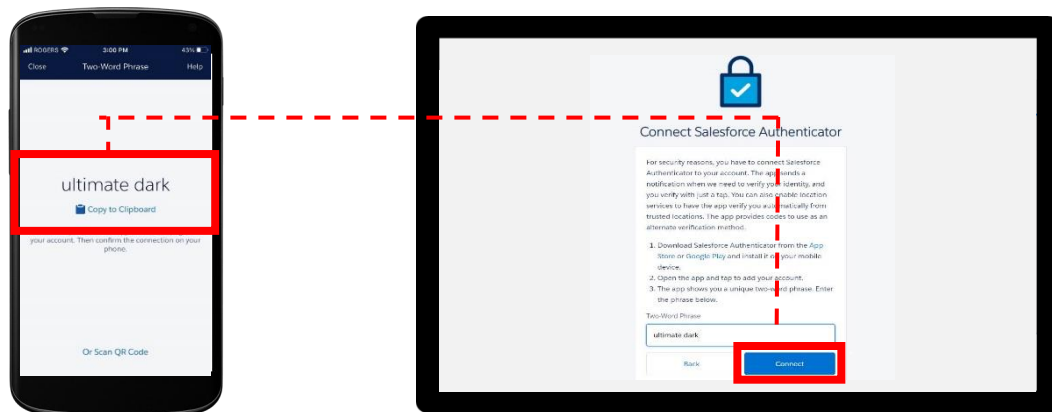
20) The following message will appear. Follow the prompt and **go back to your mobile device**.

21) On your mobile device, open the Salesforce Authenticator app.

22) The following screen will appear. Click "**Connect**".
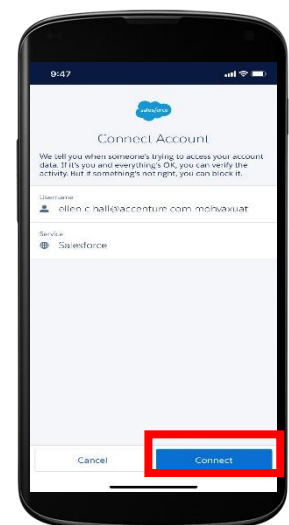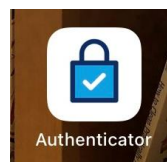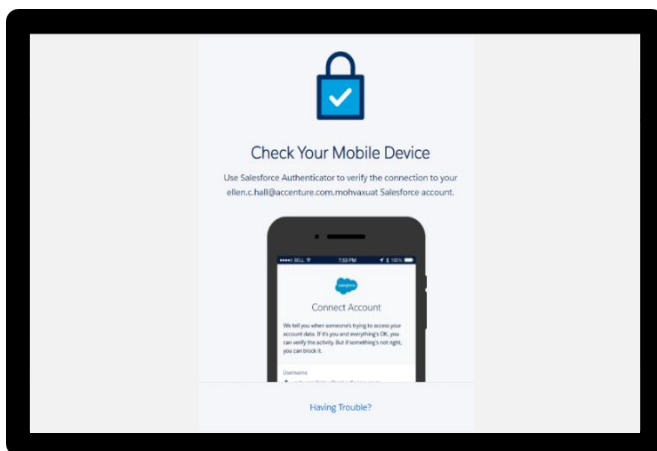
23) The app will indicate that the connection is successful. Click "**Got It**" to confirm.

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24) The Salesforce Authenticator app will ask you to approve the account. Click "**Approve**".
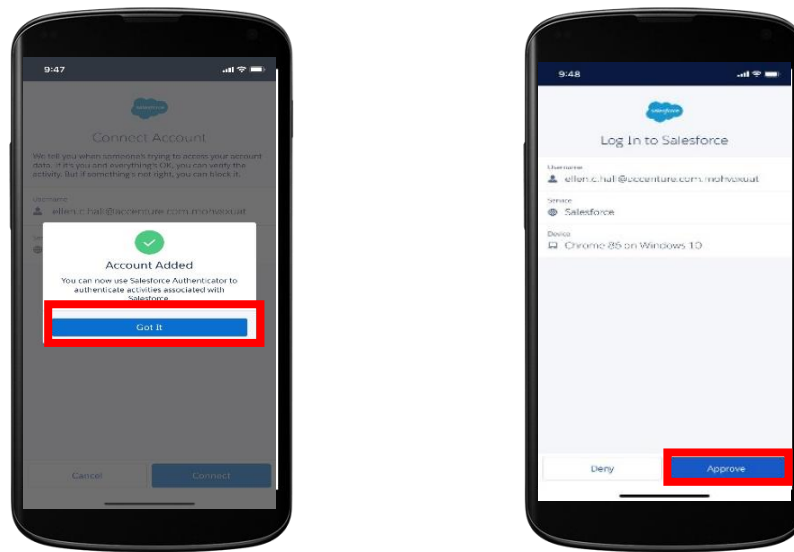
25) Using the iPad, go back to the Safari window from step 20. Follow the prompts to create a suitable password. **Ensure that you remember this password for future use.** Click "**Change Password**". You will then be logged in. You must remember this password to log into COVax_{ON}

26) Once logged in, the COVax_{ON} home page will appear as follows:
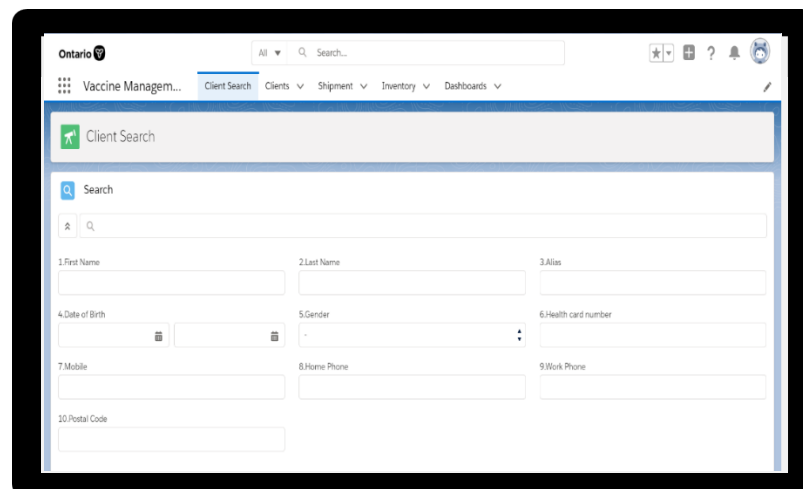
COVax_{ON} Comprehensive Login, Logout, User Settings

Target Role: *All users of COVax_{ON} (Inventory Administrator, Clinician/Admin, Waiting Room Clinician & Vaccine Administrator)*
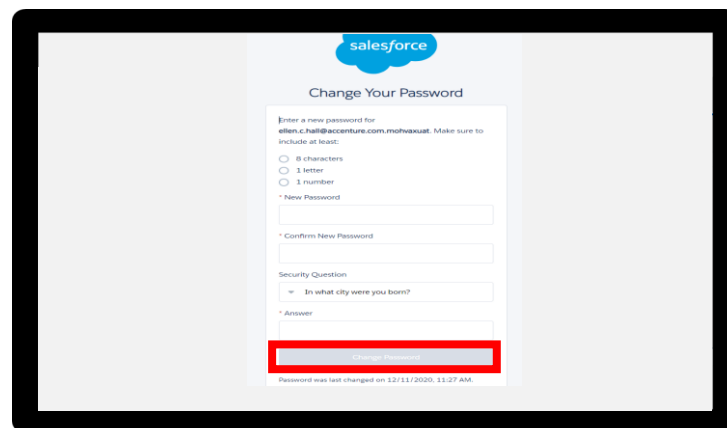

→ Logging In to your COVax_{ON} account:

1) If using an iPad on site, open COVax_{ON} using the installed application
2) If using a desktop, open the browser (Safari, Google Chrome or Microsoft Edge) and go to the COVax_{ON} URL link
3) Enter your username and password credentials. Click "**Log In To Sandbox**"

4) Again, you will see the "Acceptable Use Policy". Scroll down to read through the policy. To agree to the terms, click the "**Finish**" button at the bottom of the Acceptable Use Policy.
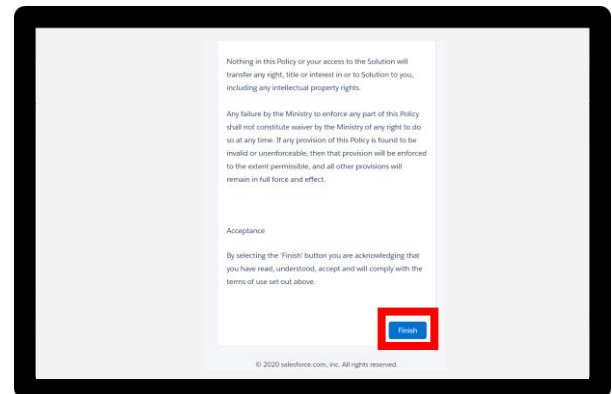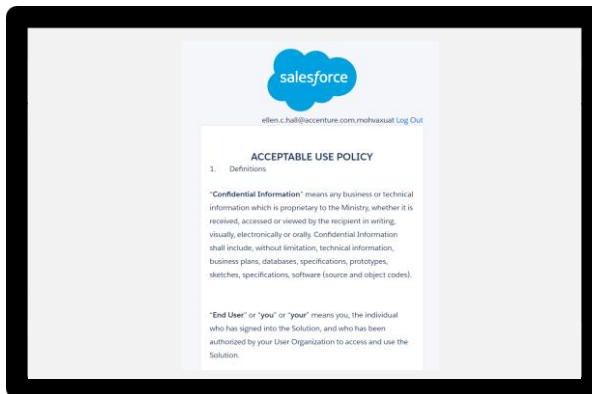
5) The first time you normally login, you will need to register your mobile device.
   - Ensure you change the country to be "**Canada**".
   - **Enter your mobile number,** Click "**Register**"
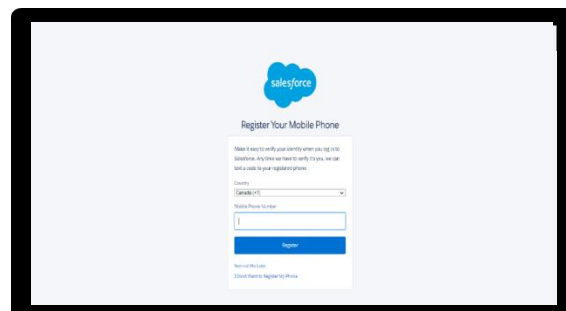
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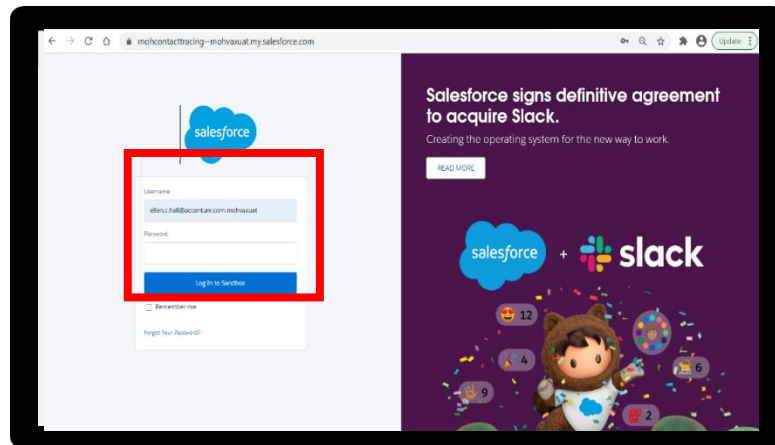
Note: *This is a one-time step. Once you complete this step, it will not appear for future logins.*

6) You will get a text message on your mobile with a verification code.
   - Enter this code on the iPad Screen.
   - Click "**Verify**".

Note: *This is a one-time step. Once you complete this step, it will not appear for future logins.*

7) On your mobile device, you will receive a request from the Salesforce Authenticator app.
8) Open the application and select "**Approve**".
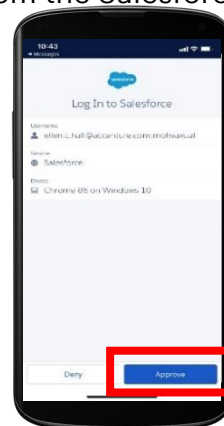
9) On the iPad, you will be brought to the COVax_{ON} home page.
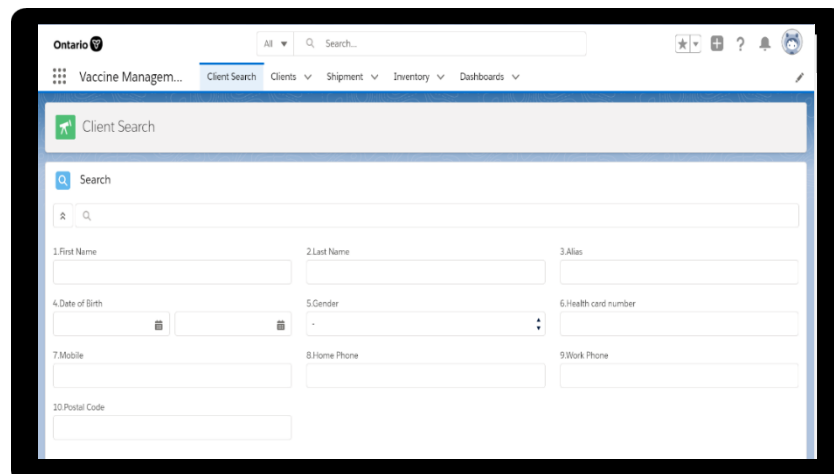
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10) After you practice in Salesforce in the training environment, COVax_ON will be moving to a "production environment". Therefore, you will need to add a new account to your authentication app. When you log back into Salesforce, you will hit "Add account". Then users can log into their new salesforce account, in the new environment. You may also need to "add an account" if you have two different COVax_ON login credentials.

Logging Out of your COVax_ON account:

1. On the iPad, from the home screen of COVax_ON, select the icon on the top right corner

2. Select "Log Out"

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3. Exit the Safari window
4. Open iPad Settings
5. Scroll down to select "Safari"
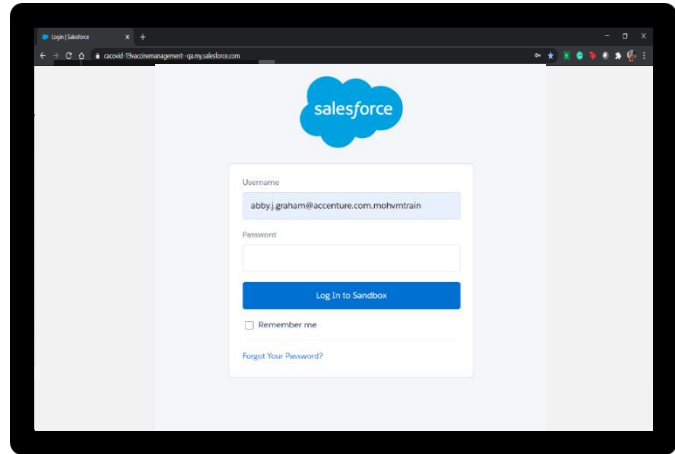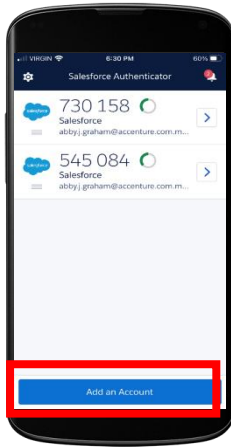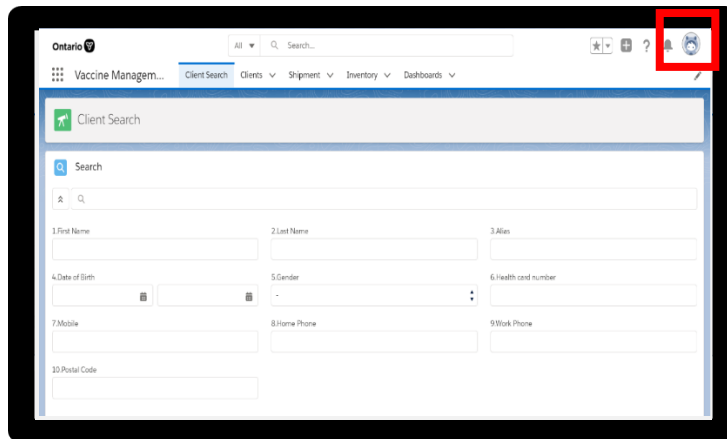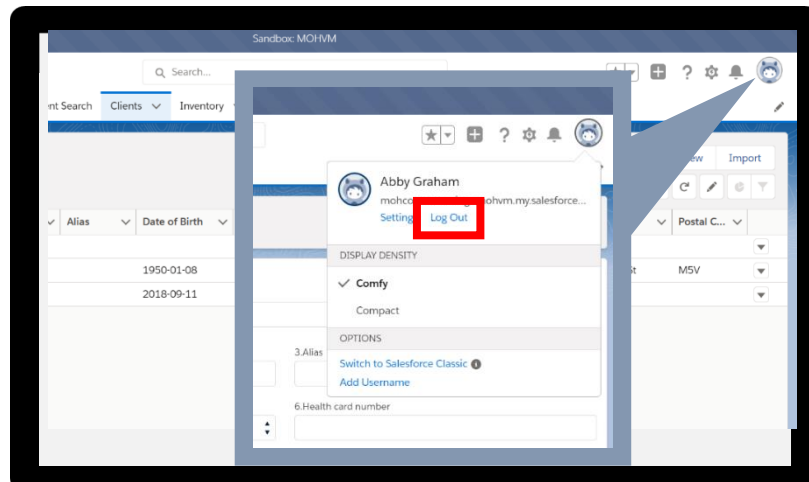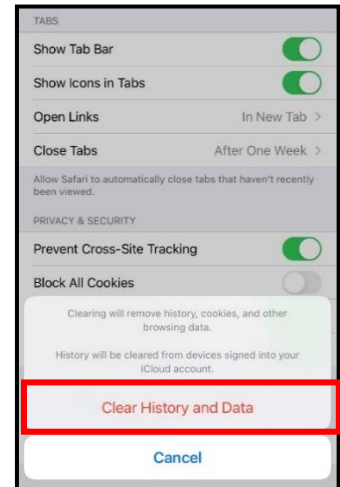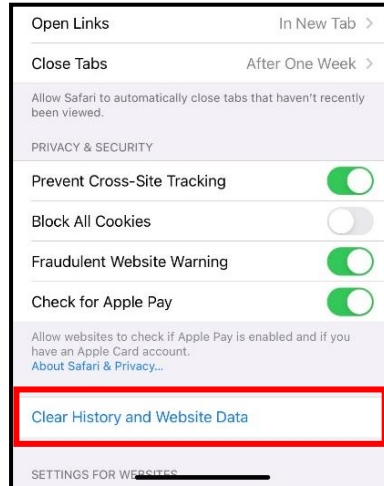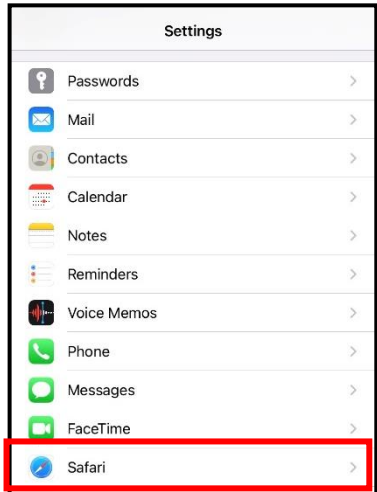6. Click "Clear History and Website Data"
7. Click "Clear History and Website Data" again

Settings		
🔑 Passwords	>	
✉️ Mail	>	
👤 Contacts	>	
📅 Calendar	>	
📝 Notes	>	
☰ Reminders	>	
🎙️ Voice Memos	>	
📞 Phone	>	
💬 Messages	>	
📹 FaceTime	>	
🧭 Safari	>	

Open Links — In New Tab >
Close Tabs — After One Week >
Allow Safari to automatically close tabs that haven't recently been viewed.

PRIVACY & SECURITY
Prevent Cross-Site Tracking — ⬤
Block All Cookies — ○
Fraudulent Website Warning — ⬤
Check for Apple Pay — ⬤
Allow websites to check if Apple Pay is enabled and if you have an Apple Card account.
About Safari & Privacy...

Clear History and Website Data

SETTINGS FOR WEBSITES

TABS
Show Tab Bar — ⬤
Show Icons in Tabs — ⬤
Open Links — In New Tab >
Close Tabs — After One Week >
Allow Safari to automatically close tabs that haven't recently been viewed.
PRIVACY & SECURITY
Prevent Cross-Site Tracking — ⬤
Block All Cookies — ○
Clearing will remove history, cookies, and other browsing data.
History will be cleared from devices signed into your iCloud account.
Clear History and Data
Cancel

8. Sanitize iPads according to individual site protocols and provide to on-site IT.

Section 2: User Setting Details

📍 **User Access based Authorized Organization**

Authorized Organization Added

As part of new functionality coming into COVax_ON, the concept of Authorized Organizations has been added. **Authorized Organizations** are the entities that are requested by the ministry (via signed agreements) to receive vaccine stock and to administer vaccinations. Authorized Organizations have accountability for vaccine stock (whether received directly from the federal government or from other Organizations) and for COVax_ON users.

Service Delivery Locations No Longer Exist: SDLs were previously associated to User Profiles, Inventory objects, Client profiles, and Dose administration records. SDLs represented the location the vaccinations were taking place and Users would change their location to perform activities on behalf of more than one location. SDLs have been removed from all records and profiles within COVax_ON and Users no longer need to change their SDL to perform activities on behalf of locations.

A Vaccination Event is a vaccination clinic ('Event') delivered by an Authorized Organization at a specific "venue" that uses the vaccine stock that the Authorized Organization has received and is accountable for. Authorized Organizations are responsible for the creation of Vaccination Events (VEs) in COVax_ON to capture stock for which they are accountable.

  o Creation of VEs by Authorized Organizations allows for the pre-population of inventory and clients in COVax_ON ahead of the Event to minimize manual data entry in COVax_ON, improves clinic efficiency and data quality during the vaccination clinic, and Reporting by the Authorized Organization on specific Vaccination Events delivered by the Authorized Organization.
  o Vaccination Events are flexible and can be created to cover the time period for the first and second dose of clients, or only one of the doses, can involve one or multiple lots of inventory, etc.

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An "Authorized Organization" field has been added to each User profile. Users can check their won **"Authorized Organization" on their profile.** See details for viewing their AO below:

👁 User Viewing the Authorized Organization on Their Profile

Option 1:

1. Select your Salesforce Avatar on the top right-hand corner of the page
2. Select "Settings"
3. Navigate to "Advanced User Details"
4. Scroll-down to check your "Authorized Organization"

Option 2:

1. On the left-hand corner of the screen, select the 9 dots, search and select Authorized Organizations
2. You can select the Related tab to see a list of inventories associated with that Authorized Organization. You can also see a history of changes made to that Authorized Organization.
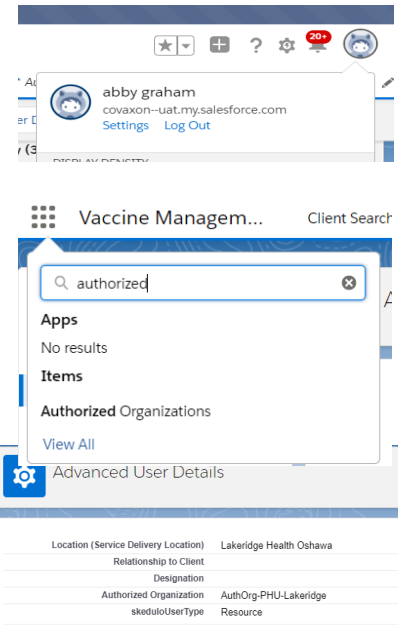
🗺 User Who Works at Multiple Authorized Organizations

- Users who work for more than one Authorized Organization will be granted separate login credentials for each Authorized Organization. If you require access to an additional Authorized Organization than what you currently have on your profile, you will need to contact the Site Lead of that Authorized Organization, so they can submit a request to the ITS team to grant you login credentials. The Site Leads are encouraged to regularly audit the list of Users and revoke access to any Users no longer working for their Authorized Organization. For any requests to revoke access, please contact the Service Desk. In the case that it is a secondary account, ensure to indicate that in the User template. Users with multiple accounts will use the same email for all accounts, but the username will be different, as per the below:
  - **Account 1:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon
  - **Account 2:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon2
  - **Account 3:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon3

- If a User is improperly mapped to an Authorized Organization and only works for one Authorized Organization, a request can be submitted by the Site Lead of the Authorized Organization to the Service Desk for the Authorized Organization to be changed.
  - **ITS Team Contact Details:**
    - **416-327-3512 / Toll Free 1-866-272-2794**
    - **COVaxonsupport@ontario.ca**
    - **Support hours are 7:00am to 8:00pm, 7 days a week**