
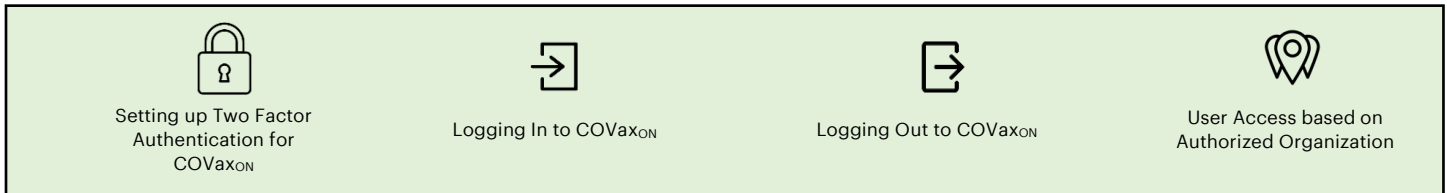


COVaxON Concise Login, Logout, User Settings

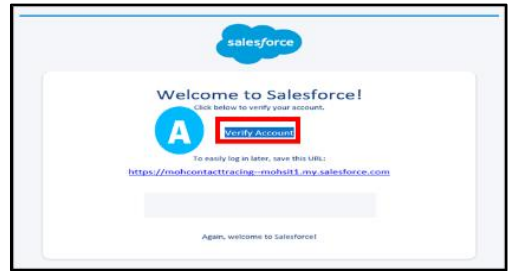
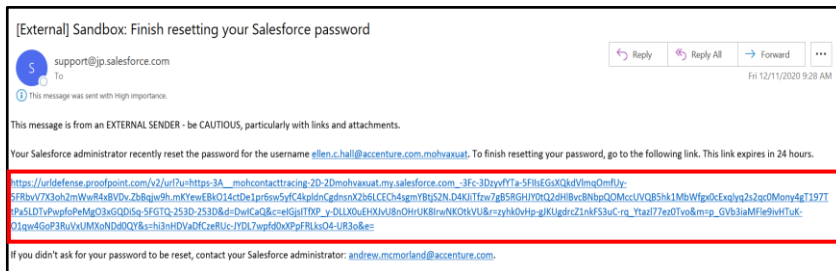
Target Role: *All users of COVaxON (Inventory Administrator, Clinician/Admin, Waiting Room Clinician & Vaccine Administrator)*

<p>Activity Description: This job aid outlines how to set up a new user profile within the COVaxON Salesforce system, how to log in and out of the system and how a user can view their Authorized Organization.</p> <p>Note: User profiles have been updated to include an “Authorized Organization”. For more details on user access and viewing your assigned Authorized Organization, view section 2 below: User Setting Details</p> <p>Notes:</p> <ul style="list-style-type: none"> • There are 2 versions of this job aid. This is the more concise one. If needed, please refer to the comprehensive one for additional details. • COVaxON 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. 	<p> All COVID public health measures must be followed in alignment with this process.</p> <p>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.</p>
<p>For assistance, contact Information Technology Services (ITS):</p> <ul style="list-style-type: none"> • (416) 327-3512 • Toll Free 1-866-272-2794 • COvaxonsupport@ontario.ca • Support hours are 7:00am to 8:00pm, 7 days a week 	<p>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</p>



Two Factor Authentication Process for COVaxON:

1. **Using the iPad, logon to your email (Gmail, UHN, Outlook, etc.) using either the Safari, Google Chrome or Microsoft Edge browser applications.** In your email, you will receive **one** of the following two emails from support@jp.salesforce.com. 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.



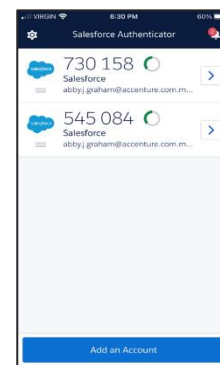
COVaxON Concise Login, Logout, User Settings

Target Role: All users of COVaxON (Inventory Administrator, Clinician/Admin, Waiting Room Clinician & Vaccine Administrator)

1. If using an iPad on site, open COVaxON using the installed application
2. If using a desktop, open the browser (Safari, Google Chrome or Microsoft Edge) and go to the COVaxON URL link
3. Enter your username and password credentials. Click **“Log-In to Sandbox”**
4. 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”**

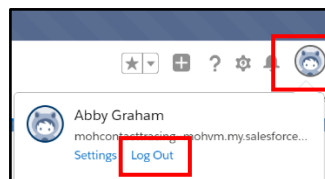
Note: This is a one-time step. Once you complete this step, it will not appear for future logins.
6. You will get a text message on your mobile with a verification code.
 - Enter this code on the iPad screen.
 - Click **“Verify”**.

Note: This is a one-time step. Once you complete this step, it will not appear for future logins.
7. If you have more than one COVaxON account and try to log-in to Salesforce, you may be required to “add account” on the Salesforce Authenticator App. Select “Add account” and the “Approve” in step 9.
8. On your mobile device, you will receive a request from the Salesforce Authenticator app.
9. Open the application and select **“Approve”**.
10. On the iPad, you will be brought to the COVaxON home page.



Logging Out of COVaxON

1. From COVaxON, click the Icon in the top right corner
2. Click **“Logout”**
3. Exit Safari, and open iPad Settings
4. Scroll down to select **“Clear History and Website Data”**
5. Click **“Clear History and Data”**
6. Sanitize iPads according to individual site protocols



Section 2: User Setting Details



User Access based on Authorized Organization

Authorized Organization Added

As part of new functionality coming into COVaxON, 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 COVaxON 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 COVaxON and Users no longer need to change their SDL to perform activities on behalf of locations.

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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 COVaxON to capture stock for which they are accountable.

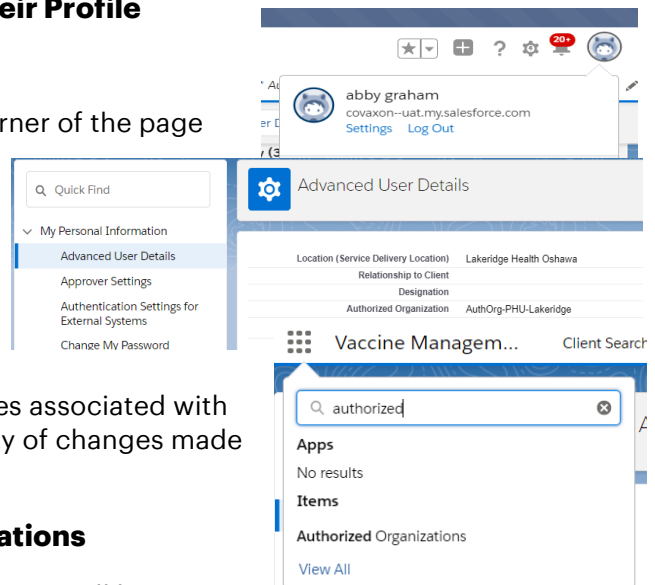
- Creation of VEs by Authorized Organizations allows for the pre-population of inventory and clients in COVaxON ahead of the Event to minimize manual data entry in COVaxON, improves clinic efficiency and data quality during the vaccination clinic, and Reporting by the Authorized Organization on specific Vaccination Events delivered by the Authorized Organization.
- 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.

An "Authorized Organization" field has been added to each User profile. Users can check their own "**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"



The screenshot shows the Salesforce user interface. At the top right, the user's avatar is visible with the name 'abby graham' and email 'covaxon--uat.my.salesforce.com'. Below this, the 'Advanced User Details' section is expanded, showing fields for 'Location (Service Delivery Location)' (Lakeridge Health Oshawa), 'Relationship to Client', 'Designation', and 'Authorized Organization' (AuthOrg-PHU-Lakeridge). A search bar at the bottom of the profile page shows the search term 'authorized' and a dropdown menu with 'Authorized Organizations' and a 'View All' link.

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**