

Operational Guidelines & Best Practices for Frontline Staff at Vaccine Clinics on Screening, Registration, and Data Entry in COVax_{on}

Version 1.1 – July 19th, 2021

This document is intended to provide frontline staff, including volunteers, registration staff, and vaccinators, with guidance and best practices on interacting with clients in a positive way while supporting high quality data collection into COVax_{on}. Specifically, this document walks through three key stages of the vaccination process, including (1) clinic entry and screening, (2) registration and check-in (including consent), and (3) vaccination.

This document is not intended to provide or take the place of medical advice, diagnosis or treatment, or legal advice.

Key Highlights

- Frontline staff play a key role in ensuring that clients have a positive experience in receiving their COVID-19 vaccine
 - Staff should uphold inclusive and respectful behaviours and practices during all interactions with clients
- Where available, an Ontario issued health card should be used for identification, however, other forms of identification can be used if a health card is not available
- It is important that each consent item is carefully reviewed with the client to ensure that client preferences are documented correctly
- Where clients consent to data collection in COVax_{on}, each field should be filled out as accurately as possible to ensure high quality data collection, including reason for immunization, contact information, and primary care provider
- Registration staff and vaccinators should carefully confirm product eligibility for clients based on product monograph, and for those receiving second dose, that the appropriate time interval has passed prior to administering vaccine

Clinic Entry and Eligibility Screening

Frontline staff (including volunteers) who act as the initial points of engagement with clients play a critical role in ensuring that the overall client experience in receiving their COVID-19 vaccination is positive. Screeners and volunteers at point of entry into the clinic are often the first point of contact a client has with the vaccination clinic, and they play a key role in making clients feel welcome and safe.

Creating a Culture of Safety

- Uphold inclusive and respectful behaviours and practices.
- Be friendly and empathetic. Be sensitive in asking for documentation and identification, and only do so where required.
- Each patient and community interaction is a chance to heal part of a broken relationship between institutions and historically marginalized people and communities.
- Adopt a trauma-informed approach in providing care and expertise.

Screening and Acceptable Proof of Identification

- Site level staff at point of entry may be asked to confirm people's eligibility for the clinic based on their postal code, employment, or other type of eligibility criteria. **It's important that communication about eligibility and confirming eligibility is clear, but not intimidating.**
- For proof of identity, clients can present a number of different documents, including driver's license, passport, piece of registered mail, pay stub, student card, or government IDs from other regions/countries.
- Should a person have no identity documentation or photo documentation or is unable to provide verification of primary place of residence, they may work with their public health unit and/or community organizations to verify their identity. This may be provided in the form of a letter from a community organization or other identity verification form.
- Refer to the Ministry developed "Guidance Document for Acceptable Proof of Identification" for additional information
- Suggested language: "Do you have anything that shows your identity? A health card is preferable, but other items such as a piece of mail can also be used."
- Availability of an Ontario health card can be requested, but is not needed for vaccination in Ontario and should not be used as a requirement to access a clinic.

Registration in COVax_{on} and Check-In

COVax_{on} continues to be the central source of documentation for all COVID-19 vaccinations provided in Ontario. It is therefore imperative to ensure that the data captured in COVax_{on} is accurate, correct, and as complete as possible, while respecting client privacy and preferences for data collection and disclosure to ensure they feel safe and welcome. Registration includes both documentation of key client information, and client consent.

Please refer to the COVax_{on} COMPASS for Clinical Workflow for COVax_{on} specific guidance on creating new clients and checking clients in for their appointments.

Consent

After individuals have passed through screening, they are asked for their consent for a number of different items that are included as a part of the registration and check-in. **It is critical that the statement for each item is carefully reviewed and that clients are asked to consent to each one individually. Registration clerks should refer to the consent script in COVax_{on} when reviewing these with clients.**

- **Consent to data collection:** Clients must choose whether they are willing to consent to having their data collected in the provincial COVax_{ON} system. If clients decline this consent, then their information must be recorded on paper, i.e., the paper-based consent form. It is important to remind clients that while consent to data collection in COVax_{ON} is not obligatory to receive the vaccine, it will affect their ability in the future to get their vaccine receipt online, book their second dose, or be contacted in relation to any issues or concerns to their vaccine.
- **Consent to receive follow-up communication by email or text/ SMS:** Where clients provide their contact information during registration, this consent asks the individual to confirm that they are willing to be contacted by the Ministry of Health after receiving vaccination for reasons related to the COVID-19 vaccination program. If clients provide an email address or mobile phone number during initial registration, these consents are auto-selected, but can be de-selected if the client does not wish to be contacted. Registration staff should confirm this choice with clients.
- **Consent to being contacted about research studies (by email, text/SMS, mail, or phone):** This consent asks if individuals are willing to be **contacted** in the future by researchers to be a part of research related to COVID-19 vaccines. This does not mean that the client is consenting to be a part of the study. Client's may choose if they want to participate in one or more studies they may be contacted about. If clients change their mind and choose to withdraw their consent, they can do so by contacting vaccine@ontario.ca.

Sociodemographic data collection

- COVax_{ON} includes fields for the **collection of sociodemographic data**. Collecting this

data will help the province have a more complete picture of who is being vaccinated, help ensure access to vaccination for communities who are at-risk and disproportionately impacted by the pandemic, and ensure that everyone who wants to be vaccinated is being reached. The data fields being collected are race, ethnic origin, language (mother tongue and preferred official language), household size and total household income. It is optional for individuals to consent to the collection of this information. The information will only be used for research study purposes if individuals provide their consent.

- Vaccine site staff **should request consent to collect, use and disclose this data from all clients obtaining vaccination.** Providing this data is voluntary and does not affect whether an individual can receive the vaccine. An individual can choose to answer all, some, or none of these questions. Consent can also be withdrawn by contacting ConsentWD@ontario.ca.
- A consent script for sociodemographic data collection is available in COVax_{ON} for frontline staff. This script provides information on what is being collected, why, and for what purposes(s). Additional resources are also available to support data collection. This includes resources available on the COVax_{ON} user Sharepoint site ([link here](#)) such as a client answer guide, and a question script and FAQ document developed jointly by the Ministry of Health and Public Health Ontario ([English link](#); [French link](#)).

Registration/Check-In

Site level staff registering clients manually for first dose (if clients are not pre-registered) are required to create a record in COVax_{ON} for the client, **if the client consents to data collection in COVax_{ON} (see Consent section)**. If the client did not consent, their details should be recorded on the paper-based consent form.

Where available, an Ontario issued health card should be used for identification, however, other forms of photo identification can be used if a health card is not available (see Screening section). Individuals are not required to present an Ontario issued health card to be vaccinated. It's important that people feel safe and welcomed even if they don't have an Ontario issued health card. If clients decline data collection in COVax_{ON}, their information should be recorded on paper using the paper-based consent form instead.

Suggested language: "I'm going to register you and check you in for today's clinic. Do you have any ID with your name on it? If you have an Ontario issued health card, that is the preferred option, but other forms of identification can be used as well."

- For clients receiving their second dose, you should confirm that the minimum interval per provincial guidance has passed since dose 1. Individuals that did not consent to have their information in COVax_{ON} will not have records in COVax_{ON}. For these individuals, you will need to ask for the receipt they received at dose 1 to confirm date of first vaccine and type of vaccine administered.

Reason for Immunization

- It is important to identify the correct reason for immunization and avoid the use of "other". **Please refer to the supplementary guidance on selecting reason for immunization**, which should be readily available for all frontline staff to support the selection of the most appropriate reason for immunization
- Some reasons for immunization will require you to select an institution. For example, if the individual is a long-term care home staff member, they will be asked to name the home at which they work. Clients should be assured that the information will not be shared with their employer.
- Second dose appointments offer an opportunity to confirm that data on reason for immunization accurately reflects the highest priority reason that applied at the time of the first vaccination, and registration clerks should confirm the reason for immunization with the client at this point in time, using the guidance document (if client consented to data collection in COVax_{on} at first dose).
- Note: for clients who consent to data collection in COVax_{on}, Reason for Immunization is a mandatory field.
- Suggested language (for individuals that have information in COVax_{on})
 - "Can you please help to confirm your information in COVax_{on}?"
 - "In order to understand who is receiving vaccinations in Ontario, we would like to know your reason for eligibility for vaccination at this time. Can you please look at this list and tell me the first reason that most applies to you?"
 - OR "In order to understand who is receiving vaccinations in Ontario, we would like to know your reason for eligibility for vaccination at this time. I will now read the list of options to you, and please stop me when you hear the reason that most applies to you."

Email, address and phone number

- Contact information in the form of email, phone number, and address are not mandatory, however, collection of this information facilitates opportunities to contact the client if the need arises in relation to the COVID-19 vaccination program, such as reminders for second doses. Best practice is to record address as this will automatically identify which Public Health Unit the individual lives in, which facilitates important information such as coverage rates. If the client does not want to provide their address, it is helpful if they are able to identify their PHU if they have this information.
- Suggested language:
 - "If you are comfortable doing so, could you please provide your email address and phone number? You are not required to provide this information, but it would provide us with a way to contact you if necessary."
 - "Could you please provide your address? It is not required; however, it will provide important information to us and provides us with an additional way to

contact you if necessary. If not, we can leave this blank, however it would be helpful for us to identify your Public Health Unit if you know this."

Primary Care Provider

- Primary care provider information can be collected for those who are able to identify their provider and provide contact information. While not mandatory, this information will facilitate important information into clients' medical records such as vaccination status and AEFIs, and should be entered where possible as this ensures continuity of care.
- Suggested language:
 - "Could you please provide the name of your primary care provider? This means your Family Physician or Nurse Practitioner. This is not required, but this information can be shared with your primary care provider so they know who has been vaccinated and can reach out to those who still need vaccination."

Vaccinating Clients and Documentation in COVaxON

- When clients come to your station for vaccination, search for their account in COVaxON using the client search function or the VE patient list, and ask for the spelling of their name or the phone number they used at registration (if client has consented to data collection in COVaxON).
 - If helpful, alternatively, you could ask for "something that shows your name so that I can spell it properly to find it in the computer".
- Eligibility for vaccination is confirmed during registration and should not be asked for again, however, it is important to validate their identity to ensure you are vaccinating the right person.
- Prior to vaccination, the vaccinator should also confirm which dose they are administering to the individual, and age eligibility per the product monograph based on the vaccine available at the clinic
 - If they are vaccinating the individual with second dose, they should confirm in COVaxON when the first vaccine was received, and which type of vaccine was given at first dose to ensure that provincial guidelines on second dose intervals are met. If the client did not consent to COVaxON data collection during first dose, they should check the paper receipt received at dose 1.
- It is important that accurate information is documented at point of service, with the right clinical data being recorded for the client during each dose. This information ensures patient safety and may have implications for future policies around proof of immunization.
- **Consent to service:** Clients must consent to receiving the vaccine before proceeding. It is the professional and legal responsibility of the provider to obtain

informed consent prior to immunization. Providers are reminded that under the Health Care Consent Act (HCCA), a person must receive information about the following matters in order to satisfy the requirement for informed consent: 1. The nature of the treatment. 2. The expected benefits of the treatment. 3. The material risks of the treatment. 4. The material side effects of the treatment. 5. Alternative courses of action. 6. The likely consequences of not having the treatment. The Ministry has provided tools to document informed consent as part of the COVID-19 vaccine program which include the COVax_{ON} system. When needed, paper copies to support documentation can be accessed on the Ministry webpage here: [COVID-19 Vaccine-Relevant Information and Planning Resources – Ministry Programs – Health Care Professionals – MOH \(gov.on.ca\)](#) Providers are encouraged to check the website regularly for updates.

- Consent to service can be withdrawn at any time, and clients should contact the vaccination clinic if they wish to do so.
- Documentation of the dose in COVax_{ON} should not take place before vaccine is administered in the event that the client changes their mind or declines to consent to service.