PCP Vaccinator or Clinic Coordinator

Document client consent for service, complete client dose administration, and record any inventory adjustments at the vaccination event (VE) level in COVax_ON.

Profiles

PCP Vaccinator, Clinic Coordinator

Note: PCP vaccinators and clinic coordinators have the same user profile as a vaccinator, along with the ability to record inventory reconciliations at the VE level.

Core Tasks | Vaccine Administration Activities

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

#	Section	Description
1.	**Confirm Client Identity**	When client arrives, search for their record in COVax_ON by using either the Client Search or Vaccination Events tabs or global search.
2.	**Create New Immunization Record - Administered**	**Administered with Vaccination Event Inventory (VEI)** – dose record administered at a point-of-service location with vaccine event inventories linked to a vaccination event that needs to be tracked by an authorized organization.
3.	**Review Immunization Record Details**	**Basic Details** – displays client information and the dose administration record information. **Consent & Assessment** – obtain and record client consent for service (or consent from a substitute decision maker), confirm consent for series. For next dose (if applicable), to ensure consent has not changed. Complete pre-screening assessment and confirm consent for service for each dose as information may have changed. **Vaccine & Product Details** – review and confirm dose information details. **Files** – provides users with the ability to upload required documents (e.g., proof of vaccination, exemption forms). **History** – an audit tracking and log of changes to the dose record.
4.	**Monitor for AEFI**	Direct client to self-monitor for adverse reaction following immunization (AEFI), then the client dose administration can be completed.
5.	**Document Potential AEFI Occurrence**	Direct client to self-monitor for adverse reaction following immunization (AEFI), then the client dose administration can be completed.
6.	**Change the Status of an Immunization Record**	Change the status of a client's immunization record if it was entered in error, invalid, invalid – SCT (Stem Cell Therapy) and CAR-T or associated with a recalled inventory.
7.	**Proof of Vaccination**	If the client would like to receive their receipt via email, and provides consent for email communication, users can re-generate and email the URL link to access the vaccine certificate via the COVID-19 patient portal

#	Section	Description
8.	**Immunization Record Under Investigation**	How to record if a record is under investigation on suspicion of vaccine validity.

Core Tasks | VE Inventory Reconciliation Activities

Below are the VE inventory reconciliation tasks you will perform on an as-needed basis. **Click the relevant link**:

#	Section	Description
9.	**VE Inventory Reconciliations**	Reconcile inventory at the VE level for: • Wastage events • Extra doses from vial adjustments • No consent adjustments

Additional Information

• Refer to the **00 – Introduction to COVax_{ON} and User Setup** job aid to learn more about your system access.

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 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.
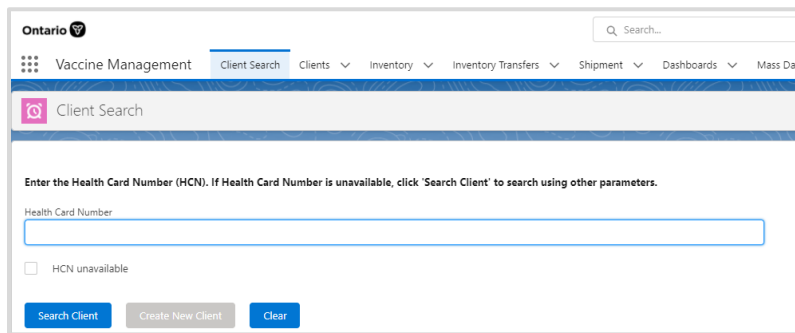
1. Confirm Client Identity

Description: Once the client arrives at the vaccination station, confirm their identity by looking at the details on their client record.

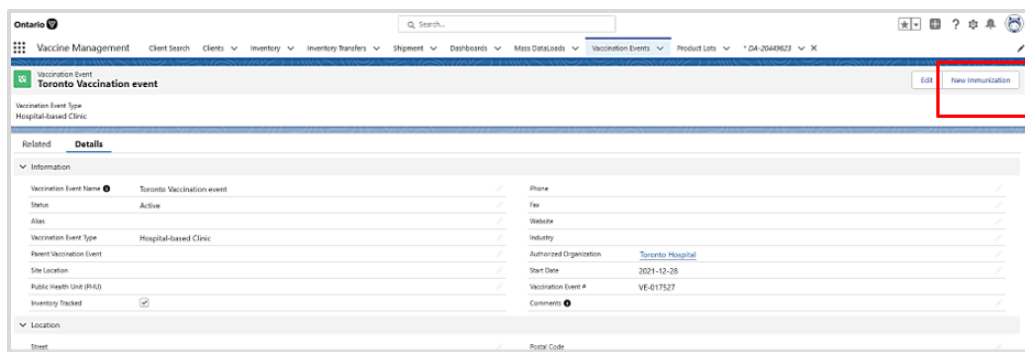Client records can be found using either the Client Search tab or the Vaccination Events tab.

From Client Search:

1. Open the Client Search tab and search for a client using their health card number (HCN) 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 that the client is tagged to the correct VE. Refer to the **03 – Search, Create and Maintain Client** job aid for more details and steps on how to locate or create a new client record.
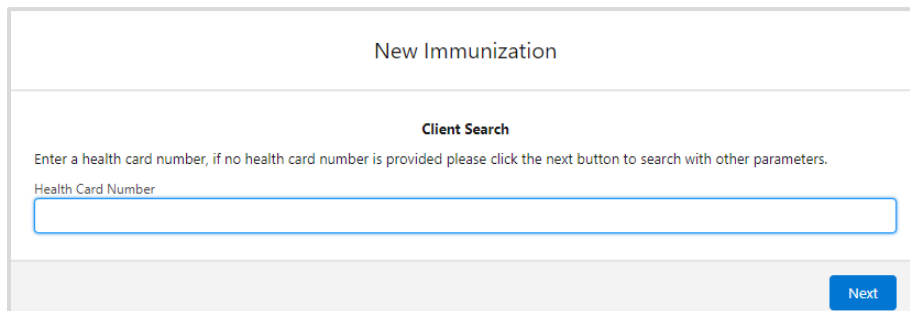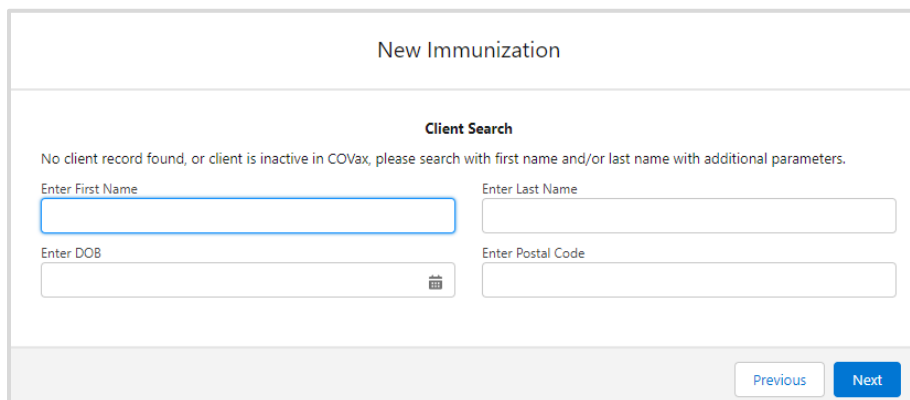
From Vaccination Event Record:

1. Open the relevant vaccination event record and click on the **New Immunization** button on the top left corner of the VE page.
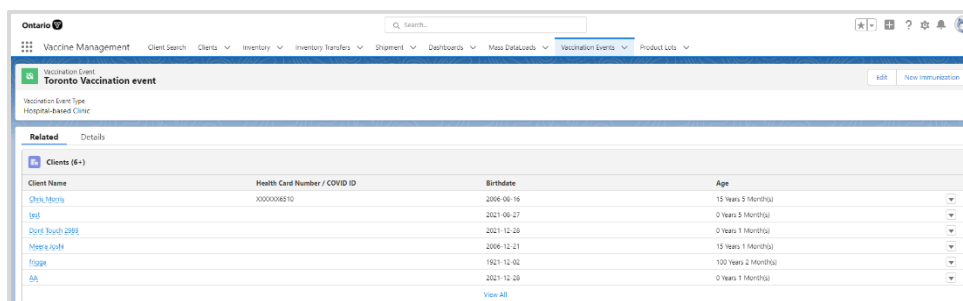

2. Leverage the search capability to enter a health card number (HCN) if available or click **Next** and enter specific client details.
   Note: COVax_ON saves previous sorting/filtering. When searching for a new client, remember to clear any previous filters.

3. Once the client is identified, click on the **Client Name's** hyperlink, and open the client's record.

4. Once the client record is opened, it is essential that the client's identity is properly validated to ensure the correct record has been accessed. Validate the client by health card number (HCN), if they have one, or by name plus other fields such as date of birth, postal code, etc.

T I P – if the client is already associated to a VE, you can also locate the client from the VE by selecting the **Related** tab to view the list of clients shown on the **Client list** view.
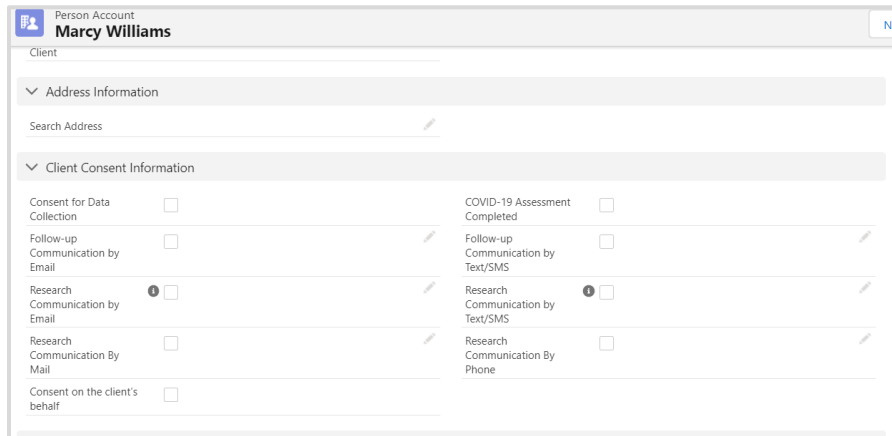

Further Context

- On the vaccination event page on the **Details** tab, there is a view that shows a centralized view of all clients that are linked to the VE with their dose administration record status, service status, and other client information. To view this report, got to the VE record you are interested in, scroll down to the *Report Links* section, and select the **Showing Clients for Vaccination Event** record.

- New immunizations cannot be created if the vaccination event Status is 'Completed' or 'Cancelled'. An error message is displayed indicating the vaccination event is no longer active and new doses cannot be recorded.

Best Practice

- **Consent for data collection** – before creating a new immunization record, ensure the client has given consent for data collection before proceeding to create a new immunization record in COVax_ON. The consent for data collection can be recorded on the client screen. If the client has not given consent to data collection, you cannot proceed with recording the dose information in COVax_ON. Follow the guidelines provided by your PHU (Public Health Unit). This is a mandatory checkbox. If the client does not consent, no further data should be entered in into COVax_ON, and the user must close this screen and continue with the offline paper process

- **Consent for follow-up communication** – additional consent information can be requested for the client to receive follow-up communications such as immunization receipt if they provide an email address and/or phone number.

- **Consent on the client's behalf** – for youth clients who have a proxy/substitute decision maker consenting for them or for youth clients who are consenting on behalf of themselves.
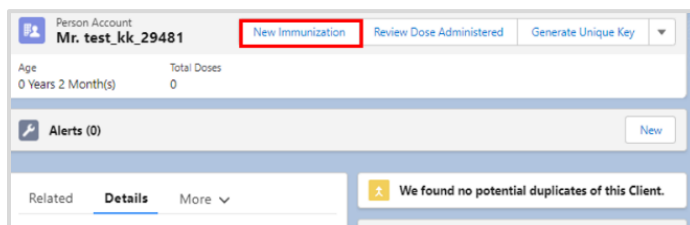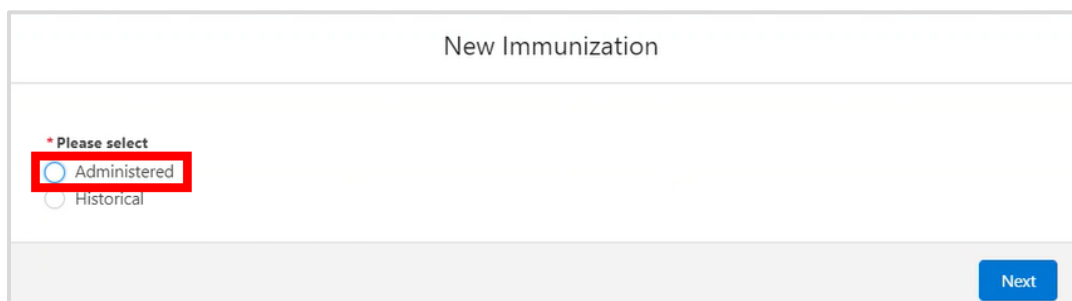
2. Create New Immunization Record – Administered

Description: Before proceeding to create a new immunization record in COVax_{ON}, ensure you have recorded that the client consents to data collection in COVax_{ON}, then create a new immunization record to record the dose administration information with tracked inventory in COVax_{ON}.

Note: Once the consent to data collection is recorded once, you will no longer need to record it for subsequent doses administered.

1. On the *Person Account* page, click **New Immunization**.

2. A new window is displayed with the option to select the immunization record type you wish to create. The record type displayed is based on user profile and/or permission.

3. Select the 'Administered' record type and click **Next**.

4. If the client is already associated to a VE from the client page or vaccination event, the VE is auto populated in the **Vaccination Event** dropdown list. **Note:** If no VE is associated to the client record, select a VE from a list of active VEs linked to your organization from the lookup field and click **Next**.

New Immunization

New Immunization - Administered

* Vaccination Event

test_29445

Previous | Next

5. Select a **Vaccine** from a list of associated **Vaccine Event Inventories** for the VE (if the VE inventory is being tracked), then click **Next**.

New Immunization

New Immunization - Administered

* Select Vaccine

PFIZER-BIONTECH COVID-19 VACCINE mRNA (double) 0.9 ml - BGT9881, 2022-04-24

Previous | Next

6. The **Pre-Screening Assessment** product-specific page is displayed.

PFIZER-BIONTECH COVID-19 VACCINE mRNA (double) 4/8444test Pre-Screening Assessment

If the individual answers yes to any of the pre-screening questions, document details in the comments box below.

☐ Have you been diagnosed with myocarditis or pericarditis following an mRNA COVID-19 vaccine?

The next dose in the mRNA COVID-19 vaccination series (Pfizer-BioNTech COVID-19 vaccine or Moderna COVID-19 vaccine) should be deferred in clients who experienced myocarditis or pericarditis following a previous dose of an mRNA COVID-19 vaccine.

☐ Have you ever had myocarditis or pericarditis before?

If yes, individual should consult their clinical team for individual considerations and recommendations. If the diagnosis is remote and they are no longer followed clinically for cardiac issues, they should receive the vaccine.

☐ Do you have today, or have you recently had new/unexplained shortness of breath or chest pain?

If yes, individual should consult with a health care provider prior to vaccination and/or if symptoms are severe, individual should be directed to the emergency department or instructed to call 911.

☐ Have you been sick in the past few days? Do you have symptoms of COVID-19 or have a fever today?

☐ Have you had a serious allergic reaction or a reaction within 4 hours to the COVID-19 vaccine before?

☐ Do you have allergies to polyethylene glycol, tromethamine or polysorbate?

☐ Have you had a serious allergic reaction to a vaccine or medication given by injection (e.g., IV, IM), needing medical care?
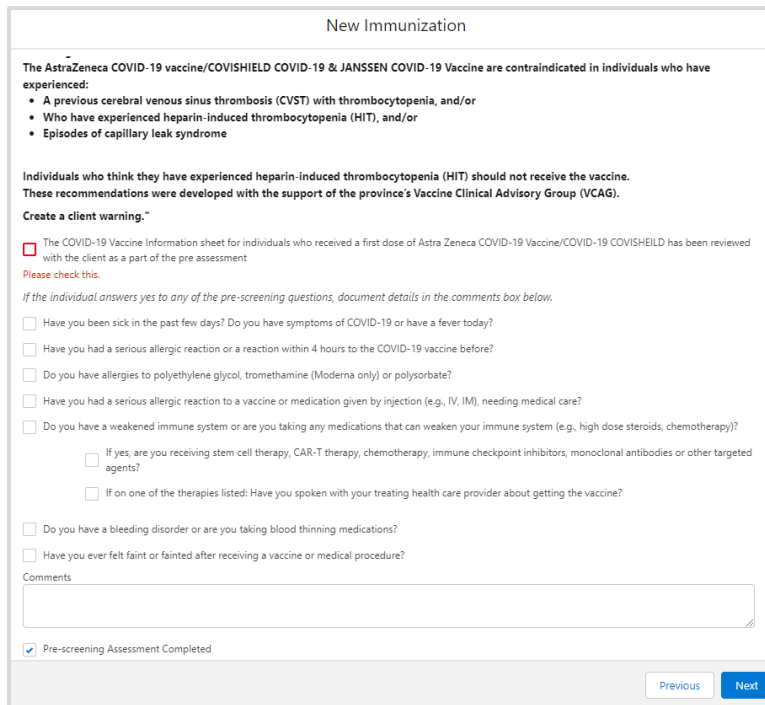
☐ Do you have a weakened immune system or are you taking any medications that can weaken your immune system (e.g., high dose steroids, chemotherapy)?

☐ If yes, are you receiving stem cell therapy, CAR-T therapy, chemotherapy, immune checkpoint inhibitors, monoclonal antibodies or other targeted agents?

Previous | Next

7. Complete the **Pre-Screening Assessment**.

    a. The pre-screening assessments for AstraZeneca, COVISHIELD, and Janssen products have an added warning message related to contraindications, and an added mandatory checkbox confirming that the COVID-19 Vaccine Information sheet has been reviewed with the client. If the client has a contraindication, an alert should be created on their record and the client should not receive the vaccine. The client can rebook their dose appointment for a later time.

    b. Based on the pre-screening assessment, vaccinators must use their clinical knowledge to determine if the client should receive the vaccine.

    c. If **Yes**, enable the checkbox to indicate the **pre-screening assessment is complete**.

8. Click **Next**.

9. The **Dose Information** page is displayed with the following fields:

10. Confirm that the **Vaccine Information Sheet** has been reviewed and the client consents to receiving the vaccine and all recommended doses in the series and populate the checkbox to confirm. Details on the Vaccine Information Sheet can be found here. If the vaccinator determines the client should not receive the vaccine, uncheck the **Vaccine Information Sheet Information** checkbox and the field below will be displayed.

    • **Reason vaccine was not administered** (checkbox) – if 'No' (client should not receive vaccine), indicate that the pre-screening assessment is complete with the **Reason Vaccination was not Administered** dropdown field on the client's record. The selection would be 'Immunization was contraindicated' or 'Practitioner decision to temporarily defer immunization'. Once populated, the client can then exit the location.

11. **Proxy Consent** (checkbox) – for youth clients who have a proxy/substitute decision maker consenting for them, follow the process outlined below by populating the **Proxy Consent** checkbox and the proxy information.

    • **Proxy Name*** – (required field)

    • **Proxy Phone** – (optional field)

- **Proxy Relationship to the Client*** – (required field)

12. **Vaccine** – text display of vaccine product selected from the VEI.

13. **Diluent Event Inventory*** – (required field) COVIDSHEILD, Moderna, AstraZeneca and Janssen products do not require a diluent so this field will not populate.

14. **Route*** – (required field).

15. **Anatomical Site*** – (required field).

16. **Dosage Administered** – if Moderna is the selected product, select the appropriate value from the dropdown list (i.e., 0.25 or 0.5). If another vaccine product is selected, otherwise a default dosage value is displayed for the selected product.

17. **Dosage Unit of Measure *** – default value is 'ml'.

18. **Date and Time *** – (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.

19. **Country Vaccine was Administered** – will be pre-populated as 'Canada'.

20. **Vaccination Event** – auto populated based on previous entry

21. **Administered By** – look up provider name that is administering the vaccine

- **Other Clinician, Other Designation** – if the vaccinator's name is not available as an option when searching within the field, select the '**Other Clinician, Other Designation'** and manually enter the name of the vaccinator in the **'Administered By (Other)'** field. It is recommended to submit a request to the Information Technology Services (ITS) team (more details in the Further Context section below). The vaccinator's details should be entered here as: [First Name] [Last Name], [Designation OR Provider Role], [Professional License].

22. **Reason for Immunization*** – (required field) auto-populated based on what was entered on the client page; however, it can be updated.

- **Institution** field is **mandatory** only when the **Reason for Immunization** field involves a congregate living, long term care home, retirement home, or child and youth eligible population.

23. Click **Finish**. A new client immunization record is created with a **Status** of 'Administered'.

Note: You can also locate the newly created immunization record and other immunization records for the client by clicking the **Client Immunizations** tab on the client page and by selecting the link from the list of immunization records displayed for the client.

Further Context

- Vaccinators can only administer doses to clients that are associated with a vaccination event (VE) within their AO. This will decrease the vaccine inventory lot associated with the AO for tracked inventory.

- Vaccinators can only administer doses to clients that are associated with a vaccination event (VE)

- The **naming convention** for each vaccine/diluent product lot is reflective of the information on the physical labels. For example:

  - Pfizer   PFIZER-BIONTECH COVID-19 mRNA 0.3 ml - EK4175, 2021-03-31
  - Moderna   MODERNA COVID-19 mRNA-1237 0.5 ml – RP0089, 2021-05-29
  - COVIDSHIELD   COVID-19 COVISHIELD 0.5 ml – 0001, 2021-03-31
  - AstraZeneca   ASTRAZENECA COVID-19 VACCINE 0.5 ml - 0008, 2021-06-30
  - 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, service 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 <u>19 days</u> from the previous dose
  - Moderna   At least <u>21 days</u> from the previous dose
  - COVIDSHIELD   At least <u>28 days</u> from the previous dose
  - Janssen   A single dose product (no minimum interval)

- Based on provincial guidelines, the AstraZeneca and COVISHIELD 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.

- **Interchangeability for previous and next product types** – when administering a different product for a client's next dose, the National Advisory Committee on Immunization (NACI) guidelines state that vaccine interchangeability is now permitted. Please note that there is no interchangeability warning message in the system. Please consult your site lead for additional clarity on when you might administer doses interchangeably and any further clinical questions you have.

- Clients with a **Reason for Immunization** as 'Child and Youth Eligible Population' (any client aged 5-11) should receive Pfizer-BioNTech CORMINATY pediatric COVID-19 mRNA.

- Any client aged 12-17 should receive Pfizer-BioNTech as their vaccine product. If a non-Pfizer-BioNTech product is selected, the user will receive a warning message as other vaccine products have not been approved for this age group. If the vaccinator chooses to bypass this warning message, they must check the **Administer Dose Outside of Clinical Guidelines** checkbox 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 immunization record and can only be edited by vaccinators and site super users.

- **User profile's authorized organization** – if you are attempting to administer a dose to a client, your user profile's AO must match the AO of the inventory being administered. Otherwise, you will be unable to select the inventory from the new immunization screen. The vaccination event (VE) 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.

- **Provider information missing in Administered By field** – request your site lead to submit a request to Information Technology Services (ITS) for the creation of a provider not currently available in the **Administered By** field. Please have the provider validated by your site lead and have the details in the table below prepared prior to contacting your site lead:
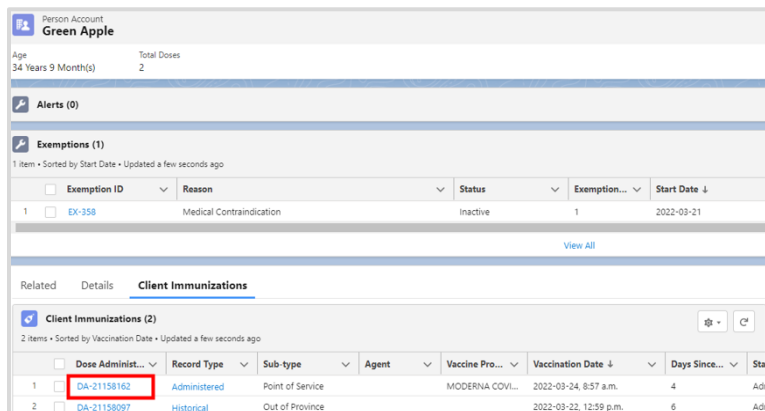
Field	Field Entry		
Provider First Name	Free text – enter the First Name		
Provider Last Name	Free text – enter the Last Name		
Provider Role *(choose option)*	Medical Doctor	Paramedic Practitioner	Registered Midwife
	Medical Resident	Pharmacist	Registered Nurse
	Nurse Practitioner	Pharmacy Student	Registered Practical Nurse
	Nursing Student	Pharmacy Technician	Respiratory Therapist
	Other Designation		
Identifier	Free-text – enter the Identifier Number		

Field	Field Entry	
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

3. Review Immunization Record Details

Description: Once an immunization record is successfully recorded the **Status** is set to 'Administered' and the immunization details can be viewed on the *Person Account* page within the **Client Immunizations** tab.

1.   On *the Person Account* page, select the immunization record from the **Client Immunizations** tab.
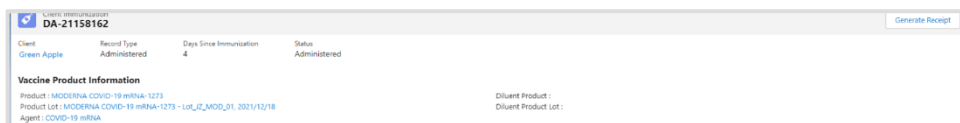
2.   The *Immunization Details* page will display with the following sections and tabs:

Note: Sections are static across all tabs displayed on the page.

- *Client Immunizations* section:

    - **Client** – displays the client's first and last name
    - **Record Type** – 'Administered'
    - **Days Since Immunization** – displays the number of days count since the client received an immunization
    - **Status** – displays the status of the immunization record 'Administered'
    - *Vaccine Product Information* section – displays the vaccine product information recorded during the immunization record flow:

        - **Product** – displays the vaccine product selected during the immunization flow and is hyperlinked to the *Vaccine & Product Details* page
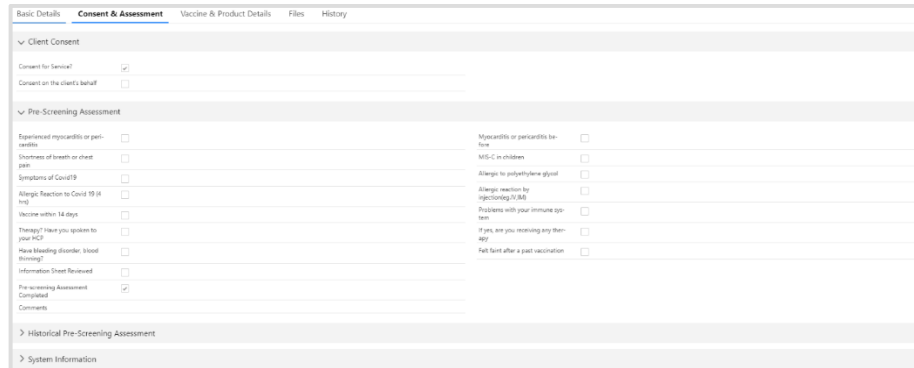
- **Product Lot** – displays the vaccine product lot selected during the immunization flow and is hyperlinked to the *Vaccine & Product Details* page

- **Agent** – displays the agent name and is hyperlinked to the *COVID-19 mRNA* page

- **Diluent Product** – displays the diluent if product selected during the immunization flow required a diluent and is hyperlinked to the *Diluent Product Details* page

- **Diluent Product Lot** – displays the diluent if product lot selected during the immunization flow required a diluent and is hyperlinked to the *Diluent Product Details* page

- **Generate Receipt** button – generate a proof of vaccination receipt (refer to the **06 – Generate Receipt** job aid for more details)

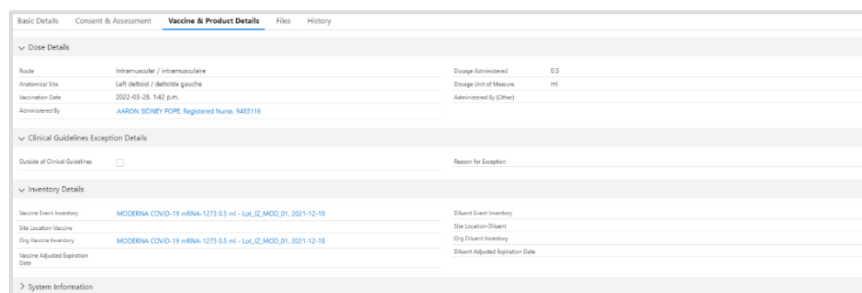- **Basic Details** tab – this tab displays information recorded during the immunization record flow

- **Client** – displays the client's first and last name, and links to the client page

- **Dose Administration** – displays the unique identifier number for the immunization record administered to the client

- **Sub-Type** – defaulted to 'Point of Service' for record type of 'Administered'

- **Days Since Immunization** – displays the number of days since the client received an immunization

- **Country Vaccine Administered** – pre-populated as 'Canada'

- **Vaccination Event** – pre-populated with the VE name recorded during the immunization record flow

- **Reason for Immunization** – pre-populated with the RIM value recorded during the immunization record flow

- **Immediate AEFI** – editable field to record if the client experienced an AEFI; refer to section 4 (Monitor for AEFI) and section 5 (Document Potential AEFI Occurrence) in this job aid for additional information

- **Source** – defaulted to 'Health Care Provider' for record type of 'Administered'

- **Authorized Organization** – pre-populated with the authorized organization for the logged in user

- *Dose Validation* section:

    - **Verification Status** – refer to section 9 (Immunization Record Under Investigation) for additional details

- *System Details* section:

    - **Created By** – displays the username of the logged in user who created the record, as well as date and timestamp

- **Last Modified By** – displays the username of the logged in user who last modified the record, as well as date and timestamp

- **Consent & Assessment** tab – displays only read-only consent information recorded during the new immunization record flow
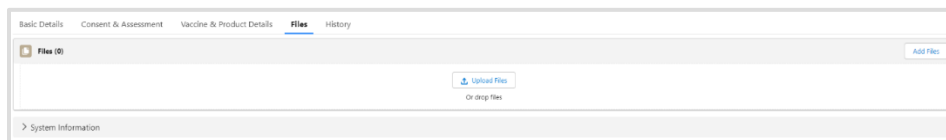

- **Consent for Service** – pre-populated as checked from immunization record flow

- **Consent on client's behalf** – pre-populated as checked from immunization record flow if data recorded

- **Pre-Screening Assessment** – pre-populated as checked from immunization record flow if data recorded

- **Historical Pre-Screening Assessment** – pre-populated as checked from immunization record flow if historical data recorded

- *System Details* section:

  - **Created By –** displays the username of the logged in user who created the record, as well as date and timestamp

  - **Last Modified By –** displays the username of the logged in user who last modified the record, as well as date and timestamp

- **Vaccine & Product Details** tab – displays read only (for all profiles) vaccine and product information recorded during the new immunization flow
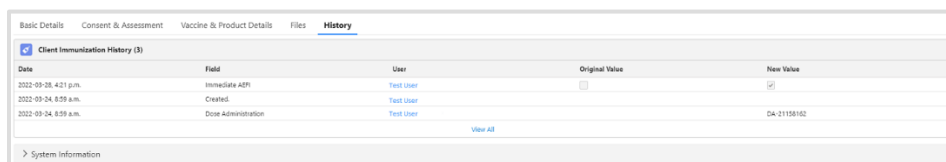

- *Dose Details* section
- *Clinical Guidelines Exception Details*
- *Inventory Details*
- *System Information*

- **Files** tab – provides users with the ability to upload required documents

- **History** tab – an audit tracking and log of changes to the dose record

4. Monitor for Adverse Events Following Immunization (AEFI)

Description: After a client has been immunized, they are instructed to wait for 15-minutes after their dose to monitor for symptoms of AEFI.

1. Client is monitored for AEFI throughout the 15-minute period.

2. Once the AEFI monitoring period is complete, locate the client record using the Client Search tab and search for a client record using their HCN (if applicable, sites can use a barcode scanner) or by other identifiers (e.g., last name, date of birth).

3. From the client's record, confirm that the service status is 'Administered' and the **Total Doses** number has increased by one dose. The **Total Doses** field indicates the number of dose administration (DA) records that have been recorded for valid doses (with the DA record status of 'Administered').

4. Confirm the client's identity by asking for their health card number (if possible), or by their name, plus any other identifiers such as date of birth or postal code and matching it to their record.

Further Context

There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, if they experienced AEFI, 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 click the **Showing Clients for Vaccination Event** report.

5. Document Potential AEFI Occurrence

Description: If, during the 15-minute period the client waits after dose administration, an AEFI occurs, treat the client appropriately and document the occurrent in COVax_ON by populating the AEFI checkbox in the immunization record. If the client does not experience an AEFI while at the location after their 15-minute wait, the AEFI checkbox should be left blank.

1. If an AEFI occurs, complete the AEFI report as per the Public Health Ontario AEFI Guidelines to record any potential AEFI details, and follow the public health guidelines.

2. Select the immunization record from the **Client Immunizations** tab on the client page. The client immunization record details page is displayed.

3. On the **Basic Details** tab, select the pencil icon to update the **Immediate AEFI** checkbox to record that the client had experienced an AEFI. (If an AEFI did not occur, leave the checkbox blank.)

4. Click **Save**.

5.   The **AEFI** checkbox is updated on the client record.

∨ Vaccine Related	
Any Adverse Events After Immunization?	✔

Further Context

- The AEFI checkbox should only be populated if an AEFI occurs during the 15-minute wait time. If an AEFI occurs after the client has left the location (i.e., in the following days/weeks) it should not be recorded in COVax_{ON}.

- Vaccinators, site staff, and site super users can enter an alert on a client's record to document any key details related to the client that would be helpful for future dose administration.

- When the inventory hits zero (0) doses available, the Inventory status will change to 'Completed'. Contact your inventory manager in this case so they can adjust the inventory appropriately.

6. Change the Status of an Immunization Record – Review Dose Administered

Description: The dose administration (DA) record status may be changed by site super users from 'Administered' to 'Invalid', 'Invalid SCT and CAR-T', 'Inventory Recalled', or 'Entered in Error' based on the 4 scenarios outlined in the chart below.

1.   Select **Review Dose Administered** button from the top right corner of the client record page.

Person Account **Kerry Jarvis**	New Immunization	Review Dose Administered	Generate Unique Key	▼
Age 23 Years 3 Month(s)	Total Doses 3			

2.   Select the DA record that requires a status update and from the dropdown menu select the **Reason** for the status change. Click **Next**. Select the reason to change the status, which will be reflected in the status of the record (refer to the table below summarizing how each status should be used).

Review Dose Administered

Select the dose administration record you need to update.

Dose Admin... ∨	Status ∨	Vaccination ... ∨	Org Vaccine ... ∨	Comments ∨
● DA-20449582	Administered	2022-01-31, 11:5...		

Select a reason to change the dose administration status
Administered
Administered
Entered in Error
In Progress
Invalid
Inventory Recalled
Wasted

Next

3. Another popup screen with a confirmation message will be displayed. Click **Finish** to complete.

Review Dose Administered

We have recorded your response successfully. Thank you for your cooperation.

Finish

4. The client's **Total Dose** count will decrease based on the administered dose status that was changed. The **Total Dose** field indicates the number of dose administration (DA) records that have been recorded for valid doses (with the DA record status of 'Administered').

Person Account
Kerry Jarvis

New Immunization | Review Dose Administered | Generate Unique Key | ▼

Age
23 Years 3 Month(s)

Total Doses
2

Dose Status Options

Dose Status	Scenario for Dose Status Change	Result
Invalid	If there is a clinical issue related to the DA record, the status of that record should be changed to 'Invalid'. For example, the client received: • Dose 2 too soon • Another vaccine type too close to the COVID-19 vaccine (proximity of days) The client will need to return to be vaccinated again. Refer to the product monograph or NACI guidelines for additional details regarding next steps for client re-immunization (provided in the MOH clinical package).	Does not adjust inventory
Invalid SCT and CAR-T	If there is a client who has received SCT or CAR-T the previous doses received should be reviewed and the status updated to 'Invalid SCT and CAR-T'. For additional details, please refer to the MOH clinical guidance documents.	
Inventory Recalled	If a product lot is recalled, the status of the DA record should be changed to 'Inventory Recalled'. For example, if it was identified that a particular lot has shown to be ineffective, the client will need to return to be vaccinated again. Refer to the product monograph or NACI guidelines for additional details regarding next steps for client re-immunization (provided in the MOH clinical package). The **Detailed Dose Client & Dose Admin** report (available to site super users) can be used to identify clients administered with the recalled inventory.	
Entered in Error	If a DA record is created in error (and that dose was not physically received by the client), the status of that record should be changed to 'Entered in Error'. For example: • If the dose was already administered to the client and logged in COVax$_{ON}$, so the new DA is duplicate. This is for historical client records as the system currently prevents duplicate doses.	1 dose gets added back to the Doses Available Inventory

Dose Status	Scenario for Dose Status Change	Result

	• The client record already existed, but a duplicate client record was created with a new DA record.
	
	 • Vaccinator accidentally recorded the dose administration to the wrong client record instead of the client presently being vaccinated. In this case:
	
	     o On the **wrong** client – follow the process to change the status of that client to 'Entered in Error'. Then follow the proper dose administration flow when that client receives their dose.
	
	     o On the **correct** client – search and find the correct client using identifiers such as HCN, date of birth, etc. Enter the dose administration for that client.	

Best Practice

- There is another status available, 'Wasted'. This status should **not** be used.

- It is not recommended to make any changes to DA records while the client is in the middle of the dose administration process.

- Only a site super user can update the status of an immunization record.

7. Proof of Vaccination

Description: To generate a receipt for the administered dose please refer to the **06 – Generate Receipt** job aid.
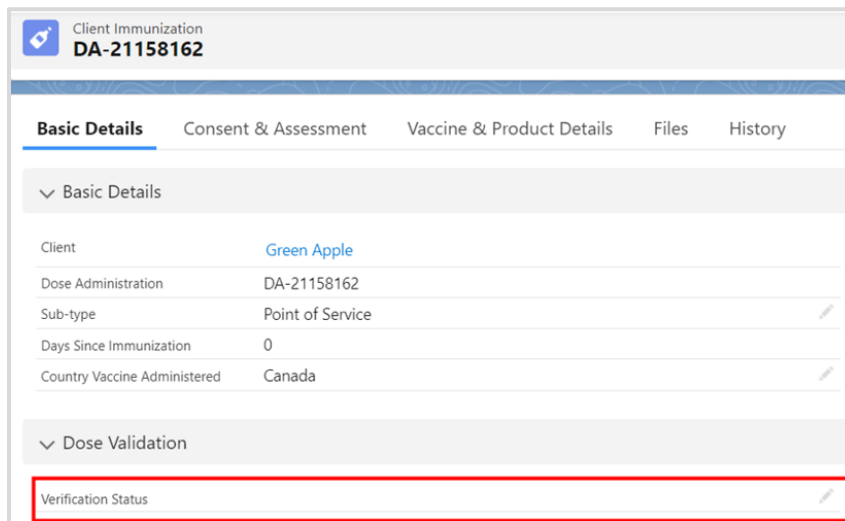
8. Immunization Record Under Investigation

Description: The **Verification Status** field on the immunization record indicates if a record is under investigation on suspicion of vaccine validity. The field is read-only for all user profiles except for a profile granted permission as a 'Fraud Investigator'.

The field contains the following dropdown values:

- **Under Review** – assigned if a DA record is being reviewed under suspicion of fraud
- **Determined Invalid** – assigned is the DA record has been deemed invalid due to the outcome of an investigation
- **Review Completed** – assigned if review is completed and the DA record is not deemed fraudulent

A user with 'Fraud Investigator' permission will have access to edit this field by clicking on the **pencil icon** (which will be visible to a user profile with the 'Fraud Investigator' permission).
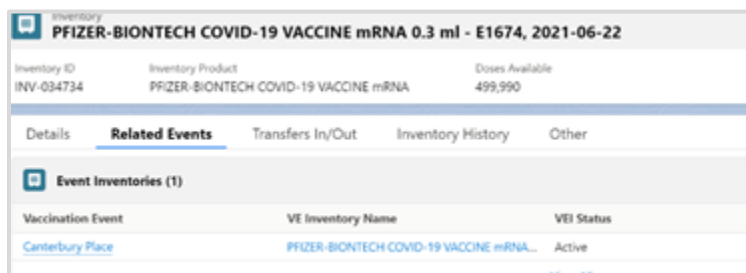
Note: The field is displayed on the immunization record for 'Administered' and 'Historical' record types.

9. 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 with COVax_{ON}. Reconciliations can occur at both the AO and VE levels. Reconciliation options at the VE level are: Wastage Event, Extra Doses from Vial adjustments, and No Consent adjustments.

1.   From the AO inventory record, select the **Related Events** tab.
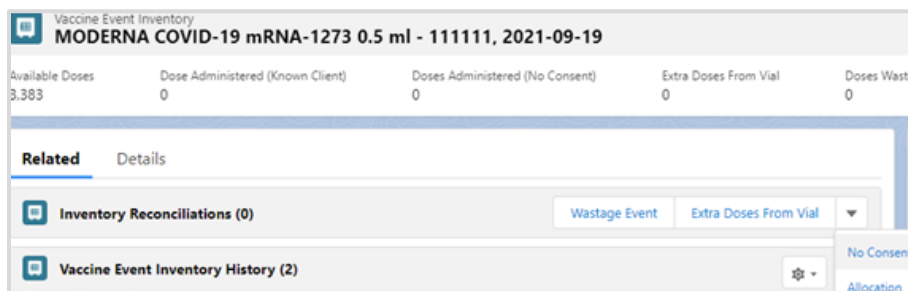
2.   Under **Event Inventories**, select the relevant vaccination event inventory (VEI) record from the associated **VE Inventory Name** hyperlink. You may also click **View All** to see the full list of associated records.

3.   From the VEI record, navigate to the **Related** tab.

4.   Under the *Inventory Reconciliations* section, select the appropriate reconciliation type and follow the instructions as per the sections below:

      a)   Wastage events
      b)   Extra does from vial
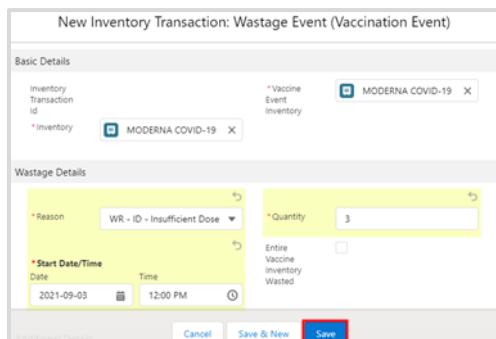   c)   No consent

Note: Users <u>cannot</u> edit inventory transaction records once they are created. If a transaction is unintentionally or mistakenly created, users must create two (2) inventory transactions to reconcile for the mistake:

- First – create a record to counteract/reverse the original error
- Second – create a record for the correct reconciliation

9A – Wastage Events

Description: For wastage events at the VE level, follow the process below. Please note that any excursion/temperature-related wastage events that occur at the VED level should be logged as a wastage event under the VE using the reason 'Vaccine Stored Temperature Excursion at Clinic'.

1.   Under *Inventory Reconciliations*, click **Wastage Event**.

2.   Fill in any 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 the reason for wastage from the dropdown list
- **Start Date/Time*** – select the date and time the wastage occurred
- **Quantity*** – enter the dose of doses selected
- **Entire Vaccine Inventory Wasted** checkbox – check if the entire inventory record has been wasted; leave unselected if only a portion of the inventory has been wasted
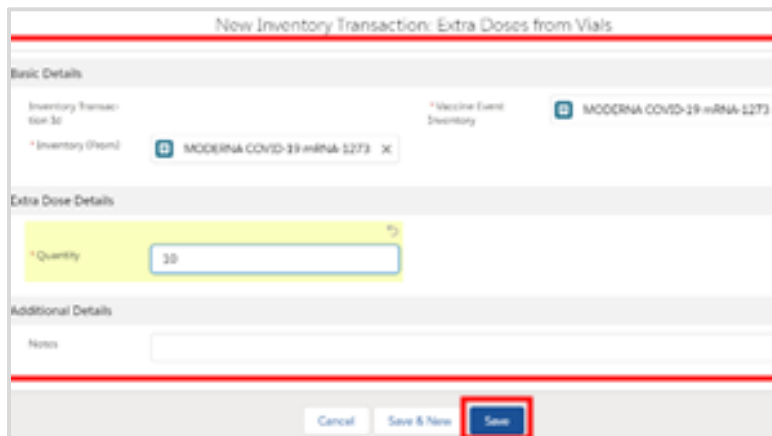- **Notes** – input any desired notes

3.   Click **Save**.

Note: Wastage event reconciliations should not be created unless the inventory record has the status 'Available'.

9B – Extra Doses from Vial

Description: All inventory arrives from the manufacturer in vials. Within each vial there is a designated number of doses yielded (e.g., for Pfizer, each vial is said to yield 6 doses). In some circumstances, extra doses from vials can be yielded (e.g., 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*, click **Extra Doses from Vial**.

2. Fill in any details of the extra does 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

4. Click **Save**.

9C – No Consent

Description: When a client does 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 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*, click on the dropdown and select **No Consent**.
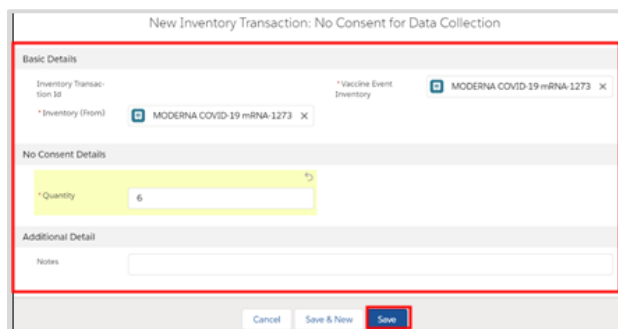
2. Fill in any details of the no consent adjustment:

- **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

5. Click **Save**.

VE Inventory (VEI) – Field Descriptions

- The status bar on the VEI screen shows the cumulative number of transactions for the vaccine event inventory (VEI)

- The cumulative VE inventory record will be updated as inventory transactions are made:

Field	Description
Available Doses	The total number of doses available at the AO level. This field is here so that VE inventory managers can view the number of doses available on the parent inventory record. This may not be representative of the number of doses that have actually been allocated to the VEI. For this number, see the **Allocated Doses** field.
Doses Administered (Known Client)	Number of doses administered to clients through regular or simplified 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 doses from vial inventory reconciliations made on the specific VEI.
Doses Wasted	Number of wastage inventory reconciliations made on the specific VEI.
Allocated Doses	The total number of doses allocated from an AO inventory record to VEI (e.g., if the number of doses was 57, and then an allocation transaction is created for 40 doses, the **Allocated Doses** field will show 97 doses).

At end of shift, log out of COVax_{ON} and clear the browser cache. Refer to the **00 – Introduction to COVax_{ON} and User Setup** job aid for detailed steps. Sanitize shared devices in accordance with location protocols.