

Inventory

Create shipments, shipment line item(s) (SLI) and process inventory ('Receive' inventory), then allocate inventory to vaccination events (VEs) to make it available for administration to clients, and reconcile inventory as part of ongoing operations.

Profiles

Vaccinators, PCP Vaccinators, Clinic Coordinators, Site Super Users

Core Tasks | Inventory Setup

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

#	Section	Description
1.	Create Shipment Records	Create a shipment record to reflect the details of doses received
2.	Create Shipment Line Item (SLI)	Create a shipment line item (SLI) for each lot received in the shipment
3.	Log Any SLI Damages	Record any SLI damages from within the SLI record
4.	Process Inventory from SLI(s)	After creating a shipment record and associated SLI(s), inventory records are created/ updated automatically through <i>processing inventory</i>
5.	Create and Edit Storage Location Records	Create a storage location for inventory if it does not already exist
6.	Allocating Doses to Vaccination Events (VEs)	<i>(AO inventory manager)</i> Allocate authorized organization (AO) inventory to a vaccination event (VE) by creating a vaccination event inventory (VEI) record. Then from the VEI record, allocate doses from the inventory record to the VEI record to make doses available for dose administration.

Core Tasks | Inventory Reconciliation

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

#	Section	Description
7.	AO Inventory Reconciliations	<i>(AO inventory manager)</i> Reconcile inventory at the AO level for: Eric adjustments: A. Wastage Events B. Excursion Events
8.	VE Inventory Reconciliations	<i>(VE inventory manager)</i> Reconcile inventory at the VE level for: A. Wastage Events B. Extra Doses from Vial Adjustments C. No Consent Adjustments
9.	Transfer Inventory	Transfer doses by: A. Sending doses within the same AO (internally) B. Sending doses between different AOs (externally) C. Cancelling inventory transfers

#	Section	Description
10.	Accepting Inventory Transfers	Once an inventory transfer has been set, the receiving AO must accept the inventory transfer by: <ol style="list-style-type: none"> Accepting transfers within the same AO (internally) Accepting transfers between different AOs (externally) Rejecting inventory transfers
11.	Manage Recalls	Create a recall against the inventory record when advised that a lot of inventory may need to be recalled. Subsequently, recalls can be rescinded if needed to become available for use.

Additional Information

- Refer to the **00 – Introduction to COVaxON and User Setup** job aid to learn more about your system access. Refer to the **MOH Clinical Package** on SharePoint for forms and process information that you might need in addition to this job aid.

Disclaimer

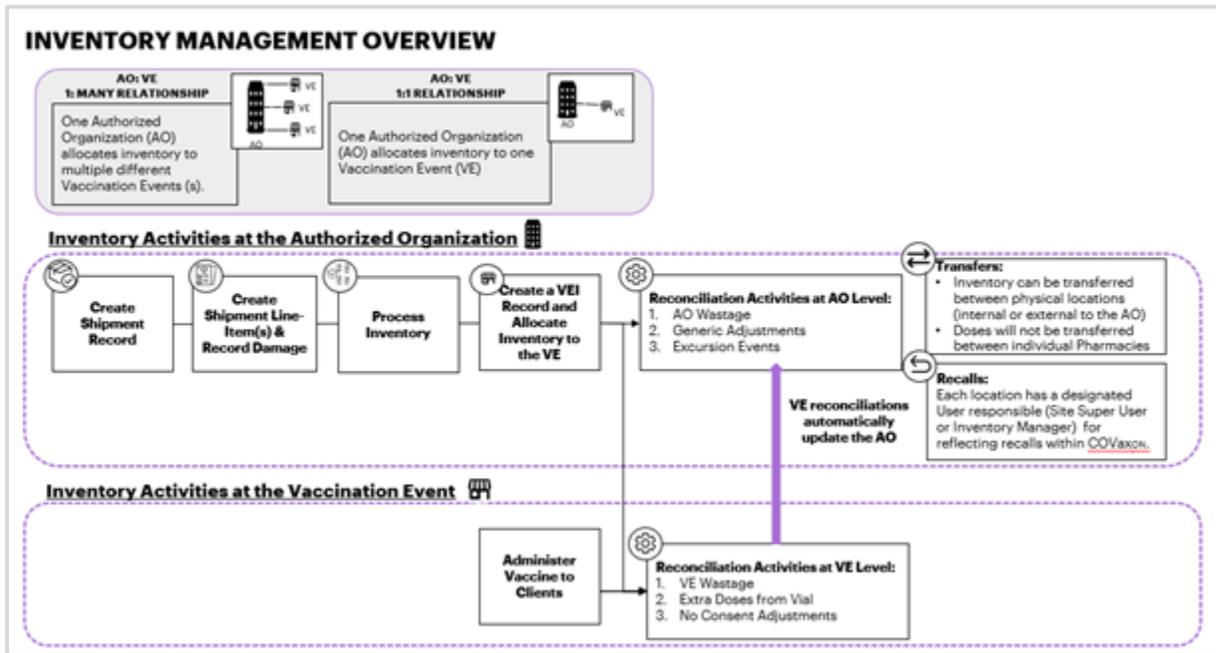
Data Privacy: Users with access to COVaxON can see the demographic details and HCNs of other clients in the system when searching for a particular person. The information is presented this way when searching for a particular person. The information is presented this way to help ensure that users access 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.** COVaxON 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.

MODULE 1 – INVENTORY SETUP

Scenario Overview: Inventory is managed by authorized organizations (AOs) which typically includes three (3) scenarios:

- Public health units (PHUs) receive and manage inventory on behalf of LTCHs/RHs/NHs or primary care physician offices** – PHUs will receive ships at an AO, where it will be inspected. PHUs will create shipment records and shipment line item (SLI) records for each lot of inventory, process inventory for SLI(s), and then allocated inventory to vaccination events (VEs) such as long-term care homes and primary care physician locations.
- Hospitals/clinics receive and manage inventory** – hospitals will receive shipments at an AO, where it will be inspected. Hospitals will create shipment records and shipment line item (SLI) records for each lot of inventory, process inventory for SLI(s), and then allocate inventory to vaccination events (VEs) – to just one VE (their hospital/clinic) or separate VEs (such as wings/floors operating as separate clinics). The PHU may request the hospital to manage and allocate inventory to other VEs such as long-term care homes.
- Pharmacies receive and manage inventory** – specific pharmacy locations will receive shipments, where it will be inspected. Pharmacies create shipment records and shipment line item (SLI) records for each lot of inventory, process inventory for SLI(s), and allocate it to the pharmacy VE (each individual pharmacy store is an AO and a VE).

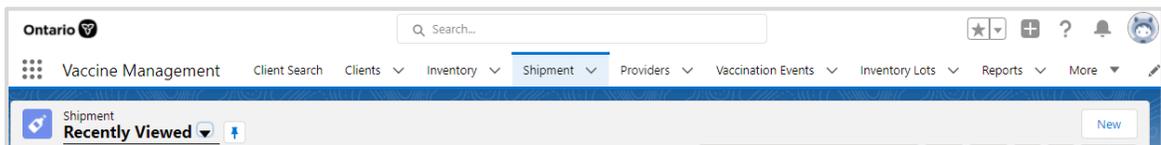


1. Create Shipment Records

Description: Authorized organizations (PHUs, hospitals, pharmacies, etc.) receive vaccine and diluent inventory from distributors (i.e., federal government) and create a shipment record to represent the full shipment received. Shipments can include multiple lots of the same product, or different vaccine products. After a shipment is received and inspected, create a shipment record to document the information in COVaxON.

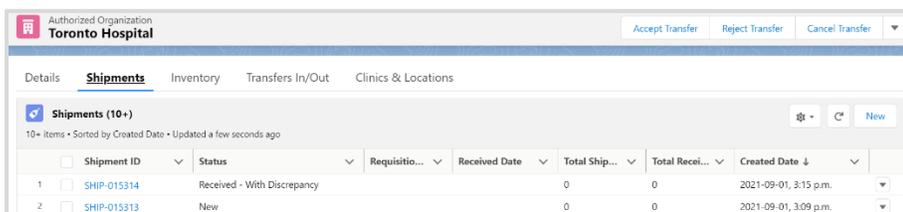
There are two (2) methods to initially create a shipment record:

- Method A**



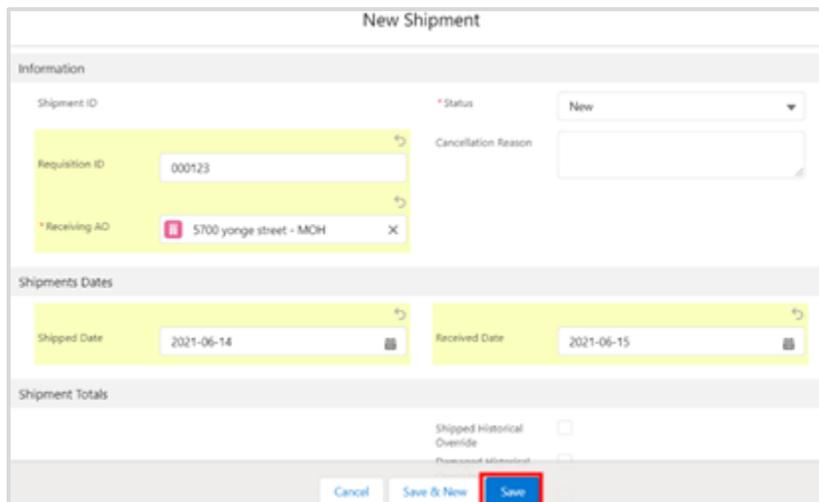
- Go to the **Shipment** tab.
- Click **New**.

- Method B**



1. Go to the AO record where the shipment is being received at.
2. Click the **Shipment** tab.
3. Click **New** (top right corner).

1. Once the window opens (using either method A or B), proceed to populate the following information:



- **Requisition ID** – enter the alphanumeric ID on the shipping paperwork
- **Receiving AO*** – (required field) if creating a shipment record from the **Shipment** tab (method A above), use the search bar to select your AO. If creating a shipment record from the AO record (method B above), the AO will be auto populated.
- **Status*** – (required field) 'New' should be selected (default) when creating the shipment
- **Shipped Date** – input the date the shipment was sent
- **Received Date** – input the date the shipment was received

2. Once complete, click **Save**.

Notes

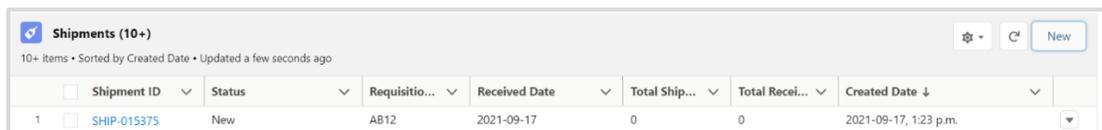
- The **Shipped Historical Override**, **Damaged Historical Override**, and **Received Historical Override** are read-only checkboxes and are not to be populated by users.
- All linked shipments for an AO can be viewed from the **Shipments** tab on the AO record.

2. Create Shipment Line Item (SLI)

Description: After creating a shipment, one or more shipment line item (SLI) records must be created. An SLI can only contain a single lot of inventory. Therefore, if a shipment includes multiple lots of inventory, multiple SLI records must be created. For example, if a shipment arrives and it includes two Pfizer product lots and one Moderna product lot, three different SLI records must be created for each distinct product/lot record.

1. Open the shipment record.

- If the shipment record was created from the **Shipment** tab (method A above), the shipment record will automatically open after creation



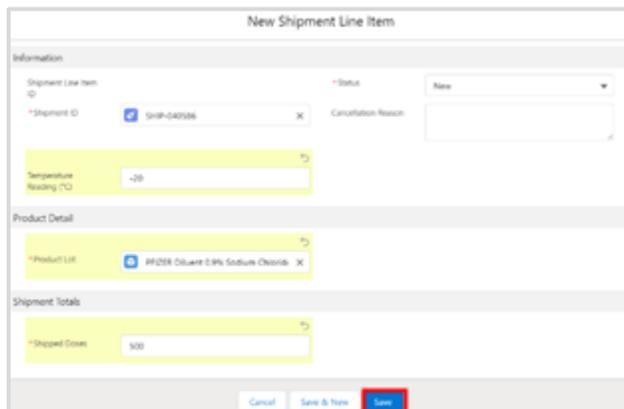
Shipment ID	Status	Requisitio...	Received Date	Total Ship...	Total Recei...	Created Date
1 SHIP-015375	New	AB12	2021-09-17	0	0	2021-09-17, 1:23 p.m.

- If the shipment record was created from the AO tab (method B above), click on the correct **Shipment ID** to open the shipment record



Shipment Line Items (1)
New

2. On the shipment record, to go the *Shipment Line Items* section and click **New**.



New Shipment Line Item

Information

Shipment Line Item ID: Status:

Temperature Reading (°C):

Product Detail

Product Lot:

Shipment Totals

Shipped Doses:

Buttons: Cancel, Save & New, **Save**

3. Populate the following information:

- **Shipment Line Item ID** – auto populated based on order of creation
- **Shipment ID** – linked shipment record will be auto populated
- **Temperature Reading** – input temperature of the doses received
- **Status** – defaulted to 'New'
- **Product Lot** – search for and select from the list of pre-created product lots (see further context section below for more details on product lot records)
- **Shipped Doses** – input the number of doses that have been received in the SLI

- Click **Save**.
- To open the newly created SLI record, click the **SLI link** from the *Shipment Line Items* section.

Shipment Line Items (1)							
1 item • Updated 12 minutes ago							
	Shipment Line...	Product	Inventory Lot	Shipped D...	Damaged ...	Received D...	Status
1	SLI-138275	MODERNA COVID-19 mRNA-1273	LOT - Moderna - MH - July 7	3,333	0	3,333	Processed - In Full
View All							

labelling SLI records:



- If you would like to cancel an SLI, click the **Cancel SLI** button at the top corner of the SLI record and input a **Cancellation Reason**.
- Once saved, the SLI’s status will automatically be updated to ‘Cancelled’. Once an SLI is cancelled, the associated SLI lot cannot be added again within the same shipment. Therefore, cancellations should be carefully reviewed as they are permanent and cannot be reversed.
- Because cancelling an SLI is final, if any edits need to be made to an SLI record, you can click the **Edit** button to make any required changes. Please note that SLI records are locked for editing once the inventory is received.

Notes

- Once inventory is processed, the SLI record is ‘locked’ for editing (see section 4 ([Process Inventory from SLI\(s\)](#)) below). Therefore, ensure that all appropriate SLI records are completed before processing inventory in the upcoming steps. For example, if the shipment record included 3 distinct lots, 3 distinct SLIs must be created before any inventory is processed.
- All quantities with regards to inventory in COVaxON are measured in doses, not vials. The amount of doses per vial differs between vaccine types.
- A tab, **Product Lots**, is available in COVaxON for inventory managers and site super users. From this tab, product lots records can be viewed. Please note, inventory managers and site super users will not be creating any records as they will be pre-created in the system by MOH super users or provincial inventory managers. Each product lot record contains information about the associated product, lot number and expiration date, and the product lot name is populated based on these fields. Recall and rescind information can also be viewed from the product lot record, as well as any notes. The product lot also has a **Status** field which will be automatically reflected on all the associated inventory records. The following status options are available for selection:
 - Active** – when selected, doses will be available on associated inventory records. If a product lot record is set to this status, all associated inventory records will be in either the ‘Available’ or ‘Completed’ status.
 - Inactive** – should be selected if the product lot is not currently being used. Doses will not be available from the associated inventory records and the **Doses Available** field will appear as ‘0’. If a product lot record is set to this status, all associated inventory records will be in the ‘Suspended for Vaccines’ status.

- **Recalled** – should be selected if the product lot has been recalled. Doses will not be available from the associated inventory records and the **Doses Available** field will appear as ‘0’. If a product lot record is set to this status, all associated inventory records will be in the status ‘Recalled’.
- **Expired** – should be selected if the product lot has expired. Doses will not be available from the associated inventory records and the **Doses Available** field will appear as ‘0’. If a product lot record is set to this status, all associated inventory records will be in the status ‘Suspended for Vaccines’.
- The product lot status will have no direct impact on the vaccination event inventory (VEI) record. Vaccinators however will be unable to administer a dose from a VEI with Inventory in the statuses ‘Inactive’, ‘Recalled’, or ‘Expired’ because 0 doses will be available on the associated AO inventory records.
- When a lot record is in the ‘Recalled’ status, do not edit the associated inventory or SLI records.
- Each SLI contains a particular product lot, which can be viewed on the SLI record.

- If the **Product**, **Lot Number** or **Expiration Date** fields are edited on the product lot record, all linked inventory records will be automatically updated.

3. Log Any SLI Damages

Description: After creating a shipment line item (SLI) record, any doses that were damaged in the shipment process can be recorded in an SLI damage record. Only one reason can be selected for each SLI damage record. If there are multiple reasons for damage, then multiple SLI damage records must be created.

1. From the **SLI** screen, the *Shipment Line Item Damage* section, click the dropdown arrow and select **New**.

2. Populate the following information:

- **ID** – auto populated based on order of creation
- **Quantity*** – (required field) input the number of damaged doses
- **Reason*** – (required field) select the reason for damage from the dropdown
- **Shipment Line Item** – associated SLI is automatically linked – do not edit this field

3. Click **Save**.

Notes

- Once the SLI damage record is saved, the following fields will be updated on the SLI record:
 - **Received Doses** – sum of the shipped doses minus all damaged doses
 - **Damaged Doses** – sum of all damaged doses within linked SLI damages record
- Ensure all damages related to shipments are captured before proceeding to section 4 ([Process Inventory from SLI\(s\)](#)). Once the inventory is processed, the SLI record will be locked and no further edits can be made to it. If any damages need to be recorded after the SLI has been locked, this must be logged as an 'Adjustment' inventory transaction at the AO level. The reason for the adjustment will be 'QH – Quantity Adjustment' and the notes should state: 'The shipment damages were entered in error. The inventory record is being adjusted by XX number of doses.'

4. Process Inventory from SLI(s)

Description: Once the shipment and all SLI records, and SLI damage record(s) within that shipment, have been created, the SLI(s) must be *processed* to automatically create the relevant inventory record(s) or update existing inventory records.

If an inventory record for the received product lot already exists in COVaxON, the quantity received for the SLI will be added to the existing inventory record. If there is no existing inventory record in COVaxON for the received lot, a new inventory record is created automatically upon processing. For example:

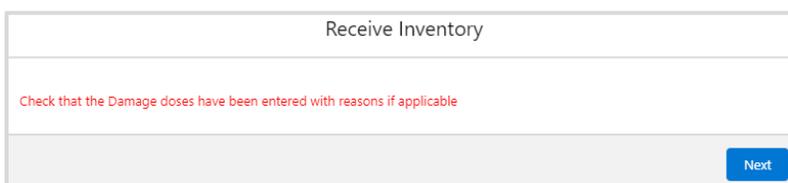
- If product lot ABC at the Toronto Public Health AO has an existing inventory record with 1000 doses, and an SLI record is created for an additional 200 doses, once the inventory is processed, the doses will be added to the existing inventory record, bringing the total number of available doses to 1200.

- If product lot XYZ at that Toronto Public Health AO does not have an existing inventory record, once the inventory is processed, the details from the lot and SLI record will be used to create a new inventory record. If the SLI record is created with 200 doses, then the inventory record will have 200 available doses. If additional SLI records are created for this inventory, they will continue to be added to the record.

1. From the SLI record, click **Receive Inventory**.

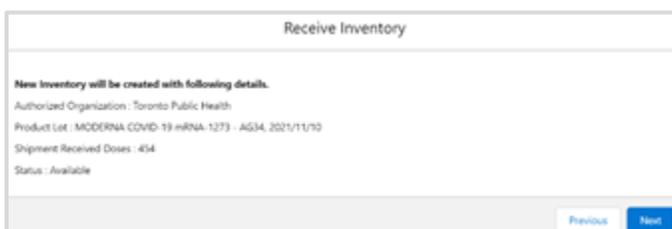


2. A warning message will appear to ensure that all SLI damages have been entered prior to processing the inventory because, once processed, the SLI record will be locked for editing. If the relevant damage has been entered, click **Next**.

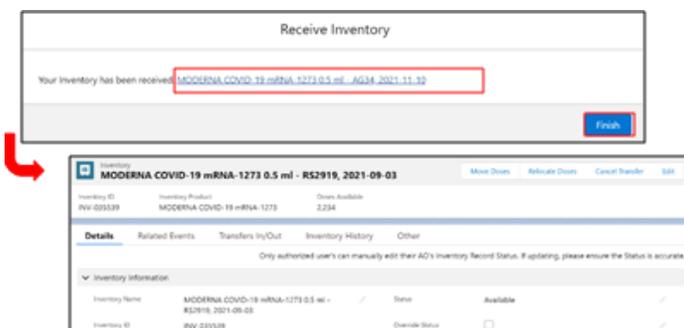


3. Depending on whether the inventory being received exists in COVaxON or not, the following will occur:

- If an inventory record for that product lot exists in COVaxON, the record details will appear on the screen. Review the information to ensure accuracy and that the new SLI doses should be added to the inventory. Select the inventory item and click **Next**. (Note: If the inventory record was formerly in the 'Complete' status (which means quantity of doses reached zero) and the new received doses are added from the SLI record, the status will be updated to 'Available'.)
- If the inventory record for the product lot does not exist in COVaxON, a new inventory record will be created using the selected lot record's details. From the newly created inventory record, users can input the appropriate storage location, or create a new location if needed (see section 5 (Create Storage Locations)). Click **Next**.



4. Once the inventory has been processed, click the **inventory hyperlink** and the record will open in a new tab. Depending on whether the inventory being received exists in COVaxON or not, an inventory record has been created or doses have been added to an existing inventory record.



- 5. Return to the original tab and exit, or click **Finish** on the **Receive Inventory** window.

Note: The inventory record outlines the product, product lot, and storage location. Within the newly received inventory record you can perform all the AO inventory activities, such as allocating to VEs, inventory reconciliations, and transfers.

- 6. Once inventory is processed, the SLI record will be updated as follows:
 - An inventory transaction record will be automatically created showing that the shipment has been received and added to the AO inventory record
 - The status of the SLI record will be automatically updated to:
 - 'Processed – In Full' if no damages were recorded
 - 'Processed – With Discrepancy' if damages were recorded

- 7. Once inventory is processed, the shipment record will be updated as follows:

- Once all linked SLIs are processed, the shipment record's status will be automatically updated, and users will no longer be able to edit the record as it will be locked
- If all linked SLIs are 'Processed – In Full' and/or 'Cancelled', the shipment status will be set to 'Received – In Full'

Shipment ID	SHIP-015062	Status	Received - In Full
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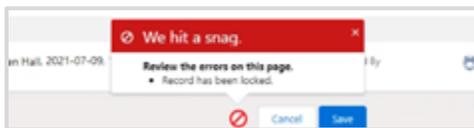
- If any linked SLIs are 'Processed – With Discrepancy', the shipment status will be set to 'Received – With Discrepancy'

Shipment ID	SHIP-015064	Status	Received - With Discrepancy
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Further Context

The Product Lot Record

- Once an SLI record has been processed (i.e., the inventory has been 'received'), the associated lot record to the SLI will be locked as read-only for users. This is to prevent any changes which may cause a mismatch between the SLI's product lot and the inventory record's associated product lot.

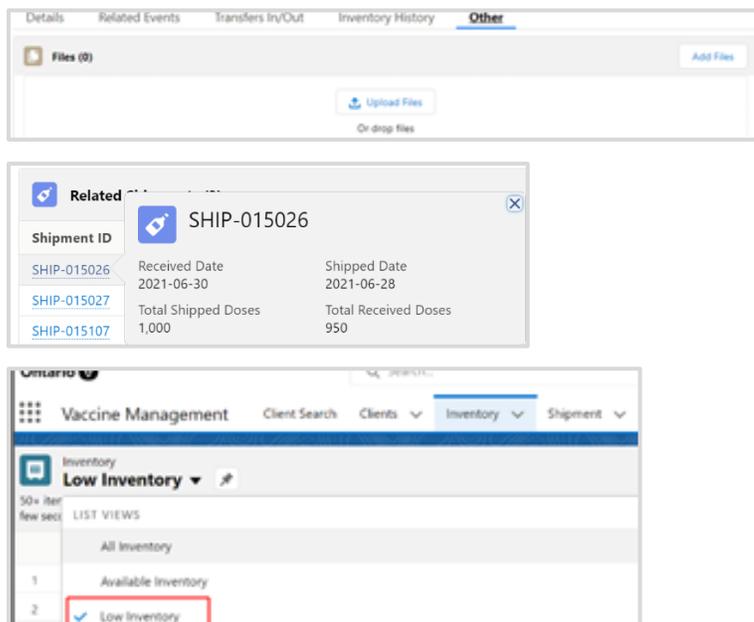


- If users try to change the product lot, an error message will be displayed when saving the SLI record.
- To make changes related to the product lot, users must contact the ITS team if they require:
 - An update to the **Product Lot** field on the SLI record
 - An update to the information fields on the product lot record (e.g., the **Expiration Date** is incorrect).

Product Lot	
ModeRNA - 27856, 2021/08/18	
Related Details	
Information	
Product Lot Name	Status
ModeRNA - 27856, 2021/08/18	Active
Product	Expiration Date
ModeRNA	2021-08-18
Lot Number	
27856	

The Inventory Record

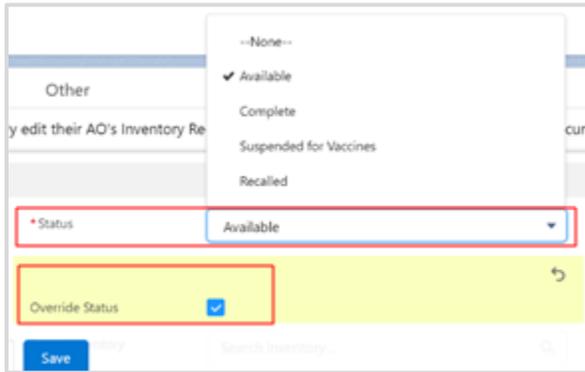
- A specific inventory record can be managed by one AO and linked to multiple VEs. As doses are administered at the VE(s), doses will automatically decrement from the associated AO inventory record.
- Each inventory record has a unique identifier called **Inventory ID**. This field helps distinguish inventory records with the same or similar names and is automatically generated when an inventory record is created. Users can search for inventory records by the **Inventory ID** in the search bar.
- Within the inventory record, there is an option to add files (e.g., a temperature logger). This can be done from the **Other** tab of the inventory record by selecting 'Upload Files'.



- On each inventory record, within the **Related Events** tab, users can see all the related shipments for that inventory record. **Related Shipments** represent all shipment records with shipment line items (SLI) which have contributed inventory to a particular inventory record. For each **Related Shipment**, when users hover their mouse over the **Shipment ID** field, a box will appear with information for that shipment record.
- Note: On the **Inventory** tab in COVaxON, a list view is available called 'Low Inventory'. This list view will display records with 1-100 'Doses Available' or negative 'Doses Available', which can occur as a result of inventory transaction.

Inventory Record 'Override Status'

- An **Override Status** checkbox is included on the inventory record to allow certain authorized users the ability to temporarily update the inventory record's status to 'Available' – independent of the product lot's status. This functionality should not be used unless there is a specific request to do so. When asked, super user and inventory manager profiles can override the status of an inventory record. For example, if a client did not provide consent for their data to be collected in COVaxON when they received a vaccine dose and they would now like their dose information to be recorded in the system, a user will have to course-correct this record. In this scenario, the inventory record from which the client received a dose would need to be made temporarily available to document the client's dose information.

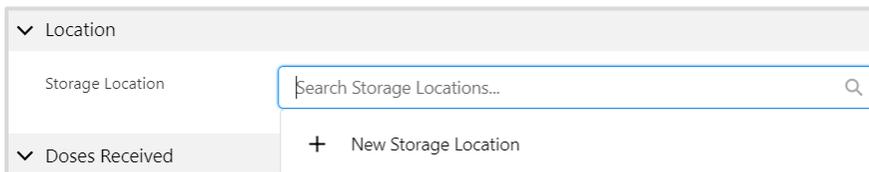


- To change an inventory record's status using the **Override Status** functionality:
 1. From the inventory record, click the **pencil icon** to the right of the **Override Status** button to edit the inventory record.
 2. Check the **Override Status** checkbox. This must be checked to update the inventory record's status.
 3. Select the status 'Available' from the dropdown.
 4. Click **Save** to update the inventory record.
 5. Perform the required update for this override.
 6. Immediately after performing step 5, edit the inventory record again to uncheck the **Override Status** checkbox and change the status back to the record's status prior to the override.

5. Create and Edit Storage Location Records

Description: A storage location is a specified location where vaccine or diluent inventory is held within an AO. After creating an inventory record, a storage location can be added. If the required storage location does not exist in COVaxON, the inventory manager or site super user can use these steps to create a new location. Storage location records can be edited if needed.

1. Create a storage location:



- a. From the **Details** tab on the inventory record, if the storage location already exists, search for and select the required storage location.
- b. If the required storage location does not exist, navigate to the **Details** tab on the inventory record and select 'New Storage Location' directly below the **Storage Location** search bar.

2. Fill in the new storage location details:

- **Storage Location Name*** – (required field) the naming convention may differ for each location depending on their layout. For example, ‘TPH – Floor 4 – Freezer B’
- **Authorized Organization*** – (required field) use the search bar to indicate the AO the inventory is associated to. This is a mandatory field and must be the same AO as the user’s profile
- **Status*** – (required field) defaults to ‘Active’; all new storage location records must be created with the status of ‘Active’; if a user changes the status to ‘Inactive’ they will receive an error
- **Storage Type** – indicates how the inventory is being stored (select from dropdown)
- **Storage Capacity** – number of doses that the storage location can hold (unit of measure = doses)
- **Temperature** – temperature of the storage location (unit of measure = Celsius)

3. Click **Save**. The storage location will be saved and you will return to the **Inventory** window. The storage location you created will be auto populated into the **Storage Location** field. Click **Save** again to save the changes to the inventory record.

The Storage Location Status

- The **Storage Location Status** field reduces the number of storage locations which appear when searching for and selecting a storage location to add to the inventory record. There are two (2) available inventory **Status** options:
 - ‘Active’ – this status should be used when the storage location is being used to store vaccine or diluent inventory. When selected, these storage locations will be searchable on the inventory record and flows.
 - ‘Inactive’ – this status should be selected when a storage location is no longer being used to store vaccine or diluent inventory. When selected, the storage location will not be searchable on the inventory record and flows.

Storage Location Inventory Related List

- Inventory related list is located on the **Storage Location** page below the *Storage Location* section, and contains the following information to be reviewed:
 - Inventory Name**
 - Status** (note – this is referring to inventory status)
 - Total Doses**
 - Total Received Doses**
 - Doses Available**
 - Total Doses Administered**
 - Total Allocated Doses**
- To review the complete lists of all inventories related to the storage location, click on the **View All** link below the list.

The screenshot shows a 'Freezer' storage location record with the following details:

- Storage Location Name:** Freezer
- Status:** Active
- Authorized Organization:** [Public Health](#)
- Storage Type:** Room
- Temperature:** [Blank]
- Storage Capacity:** [Blank]
- Created By:** Vladimir Kaganskiy, 2021-08-08, 10:32 a.m.
- Last Modified By:** Data Management, 2021-08-31, 11:18 p.m.

Below the details is an 'Inventory (4)' table with the following data:

Inventory Name	Status	Total Doses	Total Received Doses	Doses Available	Total Doses Administered	Total Allocated Doses
ASTRAZENECA COVID-19 VACCINE 0.5 mL - ABO3120, 2021-08-21	Complete	0	0	0	0	0
MODERNA COVID-19 mRNA 1.273 0.5 mL - 12245, 2021-08-21	Available	1,495	1,495	1,491	1	20
MODERNA COVID-19 mRNA 1.273 0.5 mL - 1271, 01-23, 2020-07-21	Complete	1,405	1,405	0	1	20
MODERNA COVID-19 mRNA 1.273 0.5 mL - 3002182, 2021-10-07	Available	1,828	1,800	1,828	0	2

Notes

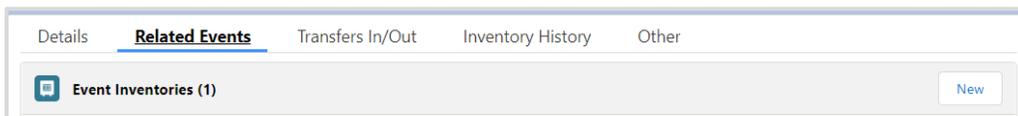
- Inventory manager and site super users can create, edit, and/or select storage location records that are within their AO, and have read-only access for storage location records outside their AO.
- Site staff and vaccinators only have read-only access for storage locations across all AOs.

6. Allocating Doses to Vaccination Events (AO Inventory Manager)

Description: Inventory managers and site super users can link existing inventory records at an AO to VEs. This allows vaccinators to select the inventory when administering doses to clients. This is a 2-step process to allocate doses to a VE. First, create a vaccine event inventory (VEI) record from the AO inventory record (AO inventory manager). Second, from the VEI record, allocate the doses by creating an 'Allocation' transaction at the VE level (AO inventory manager, site super user, inventory manager, clinic coordinator, PCP vaccinator).

As doses are administered from the VEI record, the updates will be displayed on both the VEI record and the AO record on the **Details** tab.

- Navigate to the AO inventory record if it is not already open.
- Select the **Related Events** tab.
- Click **New** to the right of **Event Inventories**.



4. From the AO inventory record, enter the details for the new vaccine event inventory (VEI):

- **VE Inventory Name*** – (required field) input ‘test’ and continue filling out the other fields; once saved, this field will auto populate with the same name as the linked AO inventory
- **Vaccination Event*** – (required field) search and select the VE the inventory is being allocated to
- **Inventory** – auto populated with the inventory associated to that AO (this is the *linked* inventory that will be decremented from as doses are administered)
- **VEI Status** – selecting ‘Active’ will make the inventory available for administration. If the inventory is not yet available for administration, users can select the status ‘Inactive’, or select ‘Entered in Error’ if the VEI record was mistakenly entered and should no longer be available for administration. After selecting ‘Entered in Error’, re-allocate the correct inventory to the VE.

Note: The **Allocated Doses** field is not editable from the **New Vaccine Event Inventory** screen.

5. Click **Save**. The new VEI record will be created.

6. Click the relevant hyperlink under **VE Inventory Name** to open the VEI record.

Vaccination Event	VE Inventory Name	VEI Status	Last Modified
Canterbury Place	PFIZER-BIONTECH COVID-19 VACCINE mRNA...	Active	2021-09-30
Canterbury Place	PFIZER-BIONTECH COVID-19 VACCINE mRNA...	Active	2021-09-30

7. Navigate to the **Related** tab, under ‘Inventory Reconciliations’, and select ‘Allocation’ from the dropdown.

'Allocation' transactions represent the movement of doses. Allocation transactions can be created by site super users, inventory managers, clinic coordinators, and PCP vaccinators. All other profiles have read-only access to allocation transactions. No user profiles can edit allocation transactions.

8. Enter the details for the new inventory allocation:

- **Inventory*** – (required field) auto populated with the inventory name
- **Vaccine Event Inventory*** – (required field) auto populated with the VE inventory name
- **Quantity*** – (required field) enter the quality being allocated to the VE
- **Notes** – enter optional notes for the allocation

9. Click **Save**.

10. The VEI record will be updated as displays the **Allocated Doses** for this VEI.

11. The AO inventory record gets updated and displays the allocation inventory transaction.

Inventory T...	Record Type	Quantity	Vaccine Event Inventory	Vaccination ...	Notes
1 IT-154135	Allocation	555	PFIZER-BIONTECH COVID-19 VACCIN...	Canterbury Place	

12. After the inventory setup has been completed, the VEI record has been created and doses have been allocated, users can allocate additional doses to a VEI by starting from step 8 and creating a new allocation transaction. This process will increase the total **Allocated Doses** on the VEI record.

Notes

- Users may link the same AO inventory record to multiple vaccination events (VEs) by allocating various amounts of that lot number across various VEs as long as they belong to the same AO.
- The **Status** on the associated product lot record does not impact the VEI record. Vaccinators however will be unable to administer a dose from a VEI with inventory from a lot in the statuses 'Inactive', 'Recalled', or 'Expired'.
- Users should not be updating the **VE Inventory Name** in COVaxON. If a user edits a **VE Inventory Name**, it will not be saved and the **VE Inventory Name** will be overridden with the accurate name.

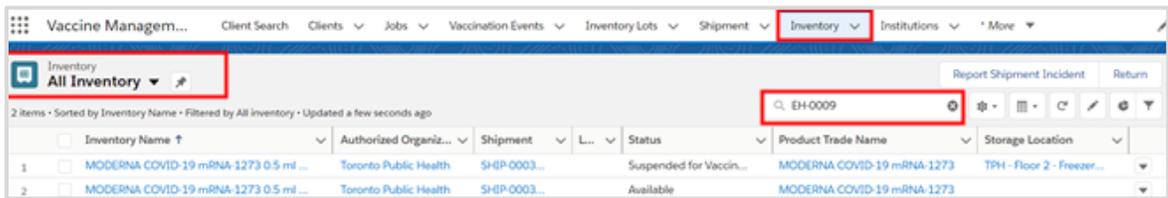
MODULE 2 – INVENTORY RECONCILIATION

The following activities should be completed on an as-needed basis by inventory managers.

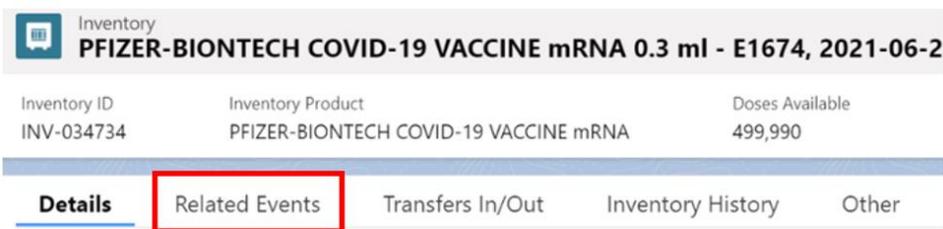
7. Inventory Reconciliations at the AO Level

Description: Inventory reconciliations ensure that the inventory information within COVaxON is reflective of the physical on-hand inventory and that there are no disruptions to the ability to vaccinate clients within COVaxON. Reconciliations can occur at both the AO and VE levels. Reconciliation types at the AO level are: ‘Generic Quantity Adjustments’, ‘Wastage Events’, and ‘Excursion Events’. For details on reconciliations at the VE level, see section 8 ([Inventory Reconciliations at the VE Level](#)) below. When inventory is reconciled at the VE level, it will also be reflected on the parent AO record. To document reconciliations at the AO within COVaxON, use the following process:

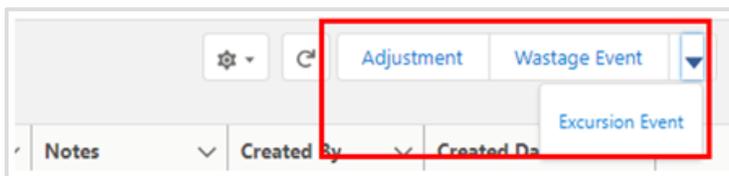
1. Go to the **Inventory** tab.
2. Select ‘All Inventory’ from the dropdown.
3. Click the AO inventory record you wish to update. You can use the search bar to aid in your search. This will bring you to a specific inventory record.



4. From the inventory record, navigate to the **Related Events** tab.



5. Under *Shipment Doses Received & Reconciliations* section, select the appropriate reconciliation type and follow the instructions in the sections below.
 - a. Adjustments
 - b. Wastage events
 - c. Excursion events



- Once an inventory reconciliation is saved, you will be directed to a screen which provides an overview of the inventory transaction. Click the hyperlink in **Inventory (From)** to return to the AO inventory record.

Note: Users cannot 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 or reverse the original error
- Second, create a record for the correct reconciliation

A. Adjustments

Description: For generic adjustments at the AO level (e.g., physical inventory count discrepancies), follow the process below. Please note that generic adjustments cannot be made at the VE level. If a generic adjustment is required at the VE (e.g., physical count discrepancy), the VE inventory manager must contact the AO inventory manager to document this adjustment at the AO level.

- In the AO inventory record, under the **Related Events** tab, click **Adjustment** from the *Shipment Doses Received & Reconciliations* section.
- Fill in the details of the adjustment:

- **Inventory Transaction ID** – unique identifier for each inventory transaction; auto populated once saved based on order of creation
- **Reason*** – (required field) select 'QH – Quantity Adjustment' from the dropdown
- **Quantity*** – (required field) indicate the number of doses that are being adjusted (can be a positive or negative number)
- **Notes*** – (required field) describe the reason for the adjustment

- Click **Save**.

B. Wastage Events

Description: For wastage events at the AO level, follow the process below.

- Under *Shipment Doses Received & Reconciliations*, click **Wastage Event**.



- Fill in the details of the wastage event:

New Inventory Transaction: Wastage Event (Inventory)

Basic Details

Inventory Transaction Id: *Inventory MODERNA COVID-19 mRN

Wastage Details

* Reason: DE - Defective Product

* Quantity: 20

* Start Date/Time: Date: 2021-09-03 Time: 12:00 PM

Entire Vaccine Inventory Wasted:

Additional Details

Buttons: Cancel, Save & New, Save

- **Inventory Transaction ID** – unique identifier for each inventory transaction; auto populated once saved based on order of creation
- **Reason*** – (required field) select reason for wastage from the dropdown
- **Start Date/Time*** – (required field) select the date and time the wastage occurred
- **Quantity*** – (required field) enter the number of doses wasted
- **Entire Vaccine Inventory Wasted** – check the checkbox 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

- Click **Save**.

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

C. Excursion Events

Description: Excursion events differ from wastage events as they specifically describe adverse storage condition (ASC) malfunctions. Therefore, excursion events are only meant for storage hubs (AOs) that both store inventory specifically at their location and when the malfunction is storage related. Therefore, wastage that occurs at a vaccination event (VE) due to onsite error will be recorded as a regular wastage event. If an excursion event is required at the VE, a wastage event with the reason 'Vaccine Stored Temperature Excursion at Clinic' should be recorded.

For excursion events at the AO level, follow the process below. All excursion events will undergo an inspection by the PHU before being validated in COVaxON.

- Once an excursion event is identified, the inventory manager or site super user must change the inventory **Status** to 'Suspended for Vaccines'.

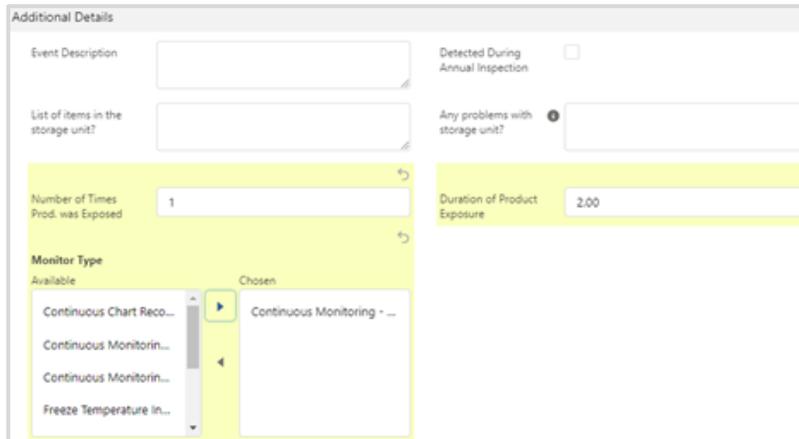
- Contact the PHU to inform them of the excursion. The PHU will perform an inspection of the event. While the inspection occurs, the doses remain in 'quarantine'.
- The PHU will contact your location with the inspection results indicating the impacted number of doses, if any. Once the investigation is complete, the excursion record can be created in COVaxON.
- Change the inventory record **Status** back to 'Available'. Excursion event reconciliations should not be created unless inspection by the PHU is completed and the inventory record is in the 'Available' status.
- To create an excursion record, within the **Related Events** tab, under *Shipment Doses Received & Reconciliations* section, click the dropdown arrow and then select 'Excursion Event'.

- Fill in the details of the new inventory excursion event:

- Inventory*** – (required field) auto populated
- Excursion Type** – (required field) select 'Temperature'
- Reason*** – (required field) select the corresponding reason from the dropdown
- Quantity*** – (required field) enter the number of doses impacted by the excursion; number of doses cannot exceed the number of doses available from the linked inventory record
- Entire Vaccine Inventory Wasted** – check the checkbox if the entire inventory was impacted in the event. Once the checkbox is selected, the number of doses in the **Quantity** field on the excursion event record will be auto populated upon saving with the number of available doses from the linked inventory record. If the

quantity of inventory impacted was less than the entire vaccine inventory record, leave the checkbox blank and input the exact quantity of impacted doses.

- **Start Date/Time*** – (required field) the date and time the excursion began
- **End Date/Time*** – (required field) the date and time the excursion was resolved
- **Discovery Date/Time** – date and time the excursion was identified



- **Temperature Reading (°C)** – indicate the temperature that the storage location was at during the excursion event
- **Min Temp During Excursion** – indicate the lowest temperature during excursion
- **Last Logged Temperature** – the last temperature showing on the data log
- **Max Temp During Excursion** – indicate the highest temperature during excursion
- **Temp Last Logged Date/Time** – enter the date and time
- **Event Description** – input any additional details
- **List of items in storage unit** – list all products stored in the compromised storage location
- **Number of Times Prod. was Exposed** – indicate the number of times the vaccine was exposed to an excursion event (1 = first time)
- **Monitor Type** – (multi select) select the monitor type from the **Available** options and use the right arrow to move the available option(s) to the **Chosen** category
- **Deleted During Annual Inspection** – check this checkbox if the event was found during annual inspection
- **Any problems with storage unit?** – list any problems with the storage unit and/or vaccine prior to the event
- **Duration of Product Exposure** – enter the total exposure the product has experienced

- **Actions Taken** – (multi select) select actions from the **Available** category and use the arrows to move the applicable actions to the **Chosen** category
- **Datalogger Recording Sent for Assessment** – check the checkbox if you have sent the log to the PHU for inspection
- **Recommended Disposition (Resolution)** – select ‘Viable’ or ‘Unusable’ from the dropdown based on the results of the PHU investigation
- **Notes** – input any additional comments
- **Reported By*** – (required field) indicate inventory manager or site super user who discovered the excursion event
- **Contact Phone Number** – input the telephone number for the owner of this record

7. Click **Save** on the excursion record.

Notes

- Once the excursion event has been saved, the **Time Duration of Excursion (In Hours)** will be calculated based on the **Start Date Occurred** and **End Date Occurred** of the excursion and can be found within the excursion inventory transaction record.

Excursion Details	
Excursion Type	
Quantity	500
Start Date Occurred	2021-07-09, 9:30 a.m.
Time Duration of Excursion (In Hours)	1hrs 30mins

AO Inventory Reconciliation – Field Descriptions

There are numerous fields on the AO inventory record that will be updated when inventory reconciliations are made:

Field	Description
Total Doses	Indicates the total number of doses managed by the AO; this includes what was received in the initial shipment, plus any received transferred doses (moved, relocated, or rejected back in), plus any extra doses extracted from vials, minus any sent transferred doses (moved, relocated, rejected back out)
Total Doses Wasted	Sum of all 'Wastage' inventory reconciliations made on the AOI and across all linked VEIs
Doses Wasted (Inventory)	Sum of all 'Wastage' inventory reconciliations made at the AOI
Doses Wasted – VE	Sum of 'Wastage' inventory reconciliations across all linked VEIs
Total Extra Doses	Sum of all 'Extra Does from Vial' inventory reconciliations made across all linked VEIs
Doses Adjusted (Inventory)	Sum of all 'Adjustment' inventory reconciliations made at the AOI
Excursions in Wastage Doses – Inventory	Sum of all 'Excursion' inventory reconciliations made at the AOI
Doses Available	Reflects the quantity of doses available at the AOI (across linked VEIs); this is the initial total doses plus any adjustments, less any doses administered, wastage events, excursions, recalls, or doses in transit out
Total Doses Administered	Sum of all 'Known' and 'No Consent' doses administered across all linked VEIs
Doses Administered (Known Client)	Sum of all doses administered to clients through the guided flow process across all linked VEIs
Doses Administered (No Consent)	Sum of all 'No Consent' inventory reconciliations made across all linked VEIs
Total Allocated Doses	Indicates the sum of all doses allocated across all linked VEIs

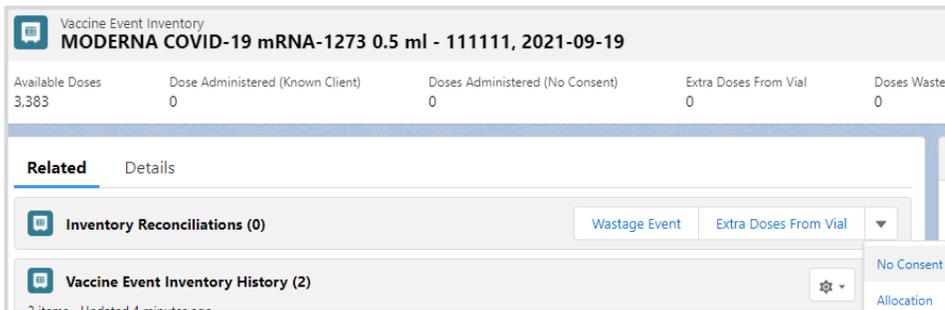
8. Inventory Reconciliations at the VE Level

Description: Inventory reconciliations ensure that the inventory information within COVaxON is reflective of the physical on-hand inventory and that there are no disruptions to the ability to vaccinate clients within COVaxON. Reconciliations can occur at both the AO and VE levels. Reconciliation options at the VE level are: ‘Wastage Events’, ‘Extra Does from Vial’ adjustments, and ‘No Consent’ adjustments. For details on reconciliations at the AO level, see section 7 ([Inventory Transactions at the AO Level](#)) above. When inventory is reconciled at the VE level, it will also be automatically reflected on the parent AO record. To document reconciliations at the VE within COVaxON, use the following process:

1. From the AO inventory record, select the **Related Events** tab.



2. Under *Event Inventories* section, 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 *Inventory Reconciliations* section, select the appropriate reconciliation type and follow the instructions in the sections below:



- a. Wastage Events
- b. Extra Doses from Vial
- c. No Consent

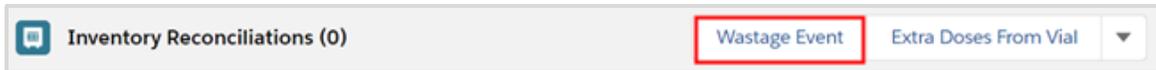
Note: Users cannot edit inventory transaction records once they are created. If a transaction is unintentionally or mistakenly created, users must create two (2) inventory transactions to reconcile for the mistake:

- First, create a record to counteract or reverse the original error
- Second, create a record for the correct reconciliation

A. 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 VE level should be logged as a wastage event under the VE using the reason 'Vaccine Stored Temperature Excursion at Clinic'.

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



2. Fill in the details of the wastage event:

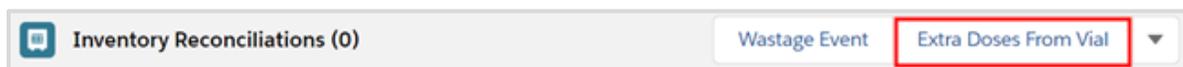
- **Inventory Transaction ID** – unique identifier for each inventory transaction; auto populated once saved based on order of creation
- **Reason*** – (required field) select the reason for wastage from dropdown
- **Start Date/Time*** – (required field) select date and time the wastage occurred
- **Quantity*** – (required field) enter the number of doses wasted
- **Entire Vaccine Inventory Wasted** – check the checkbox 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**.

B. Extra Doses from Vial

Description: All inventory arrives from the manufacturer in vials. Within each vial there is a designated number of doses yield (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 that this adjustment type is only available from the VE level since this is where vaccinations will be physically administered.

- Under *Inventory Reconciliations* section, click **Extra Doses From Vial**.



- Fill in the details of the extra dose from vial adjustment:

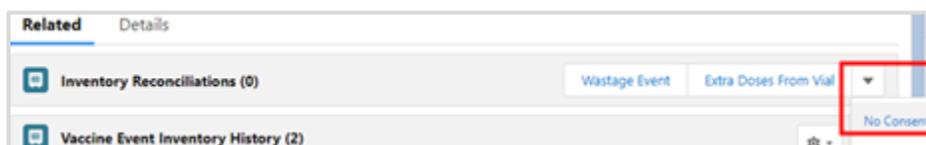
- **Inventory Transaction ID** – unique identifier for each inventory transaction; auto populated once saved based on order of creation
- **Quantity*** – (required field) input the number of extra doses from the vial that have been yielded
- **Notes** – input any desired notes

- Click **Save**.

C. No Consent

Description: When clients do not consent to data collection, their data is recorded in an offline paper form instead of in COVaxON. However, since these clients do receive a dose *external* to COVaxON, 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 outlined below. Please note that this adjustment type is only available from the VE level since this is where vaccinations will be physically administered.

- Under *Inventory Reconciliations* section, select 'No Consent' from the dropdown.



2. Fill in the 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*** – (required field) input the number of no consent for data collection doses that have been administered
- **Notes** – input any desired notes

3. Click **Save**.

VE Inventory Reconciliation – 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 records 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 the guided flow process 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 Dose 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)

9. Transfer Inventory

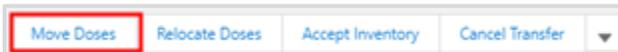
Description: Transfers in COVaxON are created to re-allocate doses from one physical location to another. Two (2) types of transfers exist. First, transfers within the same AO, in which doses are sent from one storage location to another. Second, transfers between AOs, in which different AOs will be accepting the transferred doses. Once a transfer is sent, it can be cancelled by the sender if necessary, or the receiver can accept the transfer to complete the inventory transfer process. Or, if the inventory transfer was sent in error, the transfer can be rejected (see section 10 ([Accepting Inventory Transfers](#)) below).

Important Note for Pharmacies: Each pharmacy is an individual AO and can transfer between individual pharmacies.

1. Select the **Inventory** tab.
2. Ensure 'All Inventory' is selected from the dropdown.
3. If necessary, use the search bar to locate the inventory that is being transferred.
4. Click on the relevant inventory record that you would like to transfer doses from and proceed to the appropriate section:
 - a. Sending Doses Within the Same AO (internally)
 - b. Sending Doses Between Different AOs (externally)
 - c. Cancelling Inventory Transfers

A. Sending Doses Within the Same AO (internally)

1. From the AO inventory record that the doses will be transferred from, click **Move Doses**.



2. Populate the **Transfer to Internal Storage Location** field with the storage location the doses are being moved to. Only 'Active' storage locations will appear for selection (see section 5 ([Create and Edit Storage Location Records](#)) for details).

Move Doses

* Transfer to Internal Storage Location

* Total Number of Doses

From AO : Toronto Public Health
 To AO : Toronto Public Health
 From Inventory : MODERNA COVID-19 mRNA-1273 0.5 ml - AG34, 2021-11-10
 Product Lot : MODERNA COVID-19 mRNA-1273 - AG34, 2021/11/10

[Next](#)

3. Populate the **Total Number of Doses** field with the quantity of doses being moved.
4. Review the auto populated fields for accuracy and click **Next**.

- A distinct inventory record exists for each storage location and product lot stored within an AO. If the selected store location has an existing inventory record, it will appear on the screen for selection.

- If the selected storage location does not have an existing matching inventory record, a new inventory record will be created.

- Once the doses have been successfully moved, an inventory transfer and inventory transaction record will be created. The inventory transfer record can be viewed from the new **Transfers In/Out** tab on the inventory record. This tab displays all outbound and inbound inventory transfer records. Within the transfer record, the linked **Inventory Transaction** can be viewed. Select the correct hyperlink under the **ID** column to view the inventory transaction record.

ID	To AO	To Inventory	Type	Quantity	Status
1	ITT-00000168	Toronto Public Health	Pfizer-BioNTech COVID-19 Vaccine mRNA 0.3 ml - EK4175, 2021-03-31	63	In Transit

Inventory Transfer
ITT-00000765

Type: Internal Transfer | Quantity: 200 | Status: Received

From AO: Toronto Public Health | To AO: Toronto Public Health | From Inventory: MODERNA COVID-19 mRNA-1273 0.5 ml - Y11209, 2021-11-27

Transfer Details

From AO	Toronto Public Health	To AO	Toronto Public Health
From Inventory	MODERNA COVID-19 mRNA-1273 0.5 ml - Y11209, 2021-11-27	To Inventory	MODERNA COVID-19 mRNA-1273 0.5 ml - Y11209, 2021-11-27
From Location	Toronto Public Health - Floor 2 - Freezer G	To Location	TPH - Floor 2 - Freezer G

Information

Quantity	200	Type	Internal Transfer
Status	Received	Product Lot	MODERNA COVID-19 mRNA-1273 - Y11209, 2021/11/27
System Cancelled	<input type="checkbox"/>	System Cancelled Reason	

Inventory Transactions (2)

Inventory	Record Type	Inventory	Quantity	Status or R...	Notes	Created Date
IT-59436	Transfer Out	MODERNA COVID-19 mRNA-1273 ...	200	Received		2021-06-31, 1:17 p.m.
IT-59440	Transfer In	MODERNA COVID-19 mRNA-1273 ...	200	Received		2021-06-31, 1:21 p.m.

Notes

- Moving doses to the same storage location is not permitted.
- When transferring doses internally, the inventory record must have an 'Active' storage location listed or an error message will appear.
- At least two active storage locations must exist at the AO to transfer inventory within the same AO, otherwise users will receive an error message. Therefore, both the storage location sending and the storage location receiving the inventory must be 'Active' in order to complete the transfer.

B. Sending Doses Between Different AOs (externally)

1. From the AO inventory record that the doses will be transferred from, click **Relocate Doses**.



2. Populate the **Transfer to Authorized Organization** field with the AO the doses are being relocated to.

A form titled 'Relocate Doses'. It contains the following fields:

- *Transfer to Authorized Organization: A dropdown menu with 'Lambton Public Health' selected and a close button (x).
- *Total Number of Doses: A text input field containing '55'.
- From AO : Toronto Public Health
- Product Lot : MODERNA COVID-19 mRNA-1273 - YT1209, 2021/11/27
- A blue 'Next' button at the bottom right.

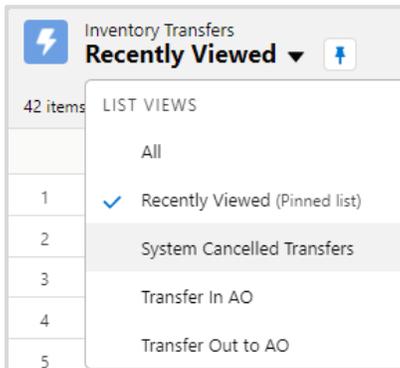
3. Populate the **Total Number of Doses** field with the quantity of doses being relocated.
4. Review the auto populated fields for accuracy and click **Next**.

Notes

- To confirm the correct name of the AO you are transferring to, refer to the **Authorized Organization** tab.
- Relocating doses to the same AO is not permitted.
- A storage location is not required on the inventory record to send an external transfer. However, when a storage location is tagged to the inventory record, inventory can only be transferred when the inventory record is tagged to an 'Active' storage location.
- When relocating doses, if a storage location is listed on the inventory record, it must have an 'Active' storage location. If the storage location is 'Inactive', an error message will appear.

Further Context

- Inventory status must be 'Available' to successfully move or relocate doses. If the inventory status is 'Recalled', 'Inactive', or 'Expired', the user will receive an error message.



- Users will receive an error if attempting to transfer more doses than are available (e.g., if there are 400 doses available at the AO and the user tries to transfer 500 doses).
- Site super users and inventory managers can use the **Inventory Transfers** tab in COVaxON to view existing inventory transfers. This tab has 5 available list views:
 - All** – all inventory transfers in COVaxON
 - Recently Viewed**
 - System Cancelled Transfers** – contains transfers with the 'Cancelled' status; this list view will display records from all AOs within COVaxON
 - Transfer In AO** – contains transfers sent to the users' AO
 - Transfer Out to AO** – contains transfers sent from the user's AO
- A **Status** column is added to 3 list views: System Cancelled Transfers, Transfer In AO, Transfer Out to AO.

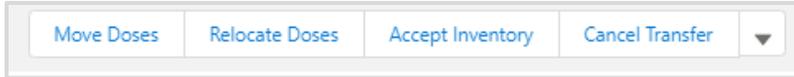
The screenshot shows a table titled 'System Cancelled Transfers' with the following columns: ID, From AO, From Inventory, Type, Quantity, Status, To AO, To Inventory, and Product Lot. The table contains 17 rows of data, all with a 'Cancelled' status.

ID	From AO	From Inventory	Type	Quantity	Status	To AO	To Inventory	Product Lot
1	Toronto Hospital	COVISHIELD VACCL...	External Transfer	200	Cancelled	MCK-Clinic Pharmac...	COVISHIELD VACCI...	
2	Toronto Hospital	COVISHIELD VACCL...	Internal Transfer	200	Cancelled	Toronto Hospital	COVISHIELD VACCI...	COVISHIELD VACCI...
3	Toronto Hospital	COVISHIELD VACCL...	Internal Transfer	200	Cancelled	Toronto Hospital	COVISHIELD VACCI...	COVISHIELD VACCI...
4	Toronto Hospital	COVISHIELD VACCL...	External Transfer	77	Cancelled	toronto University H...	COVISHIELD VACCI...	COVISHIELD VACCI...
5	5700 Yonge Stre...	8840Pfizer null null ...	Internal Transfer	200	Cancelled	5700 Yonge Street	Pfizer null null - Lot ...	Test inventory
6	5700 Yonge Stre...	8840Pfizer null null ...	Internal Transfer	200	Cancelled	5700 Yonge Street	Pfizer null null - Lot ...	Test inventory
7	5700 Yonge Stre...	8840Pfizer null null ...	External Transfer	200	Cancelled	MCK-Total Health P...		Test inventory
8	Toronto Hospital	Pfizer null null - Lot ...	Internal Transfer	200	Cancelled	Toronto Hospital	Pfizer null null - Lot ...	Test inventory
9	Toronto Hospital	Astra_8840 0.8 ml - ...	Internal Transfer	20	Cancelled	Toronto Hospital	Astra_8840 0.8 ml - ...	8840_Astra
10	Toronto Hospital	Janssen_8840 0.9 ml...	Internal Transfer	20	Cancelled	Toronto Hospital	Janssen_8840 0.9 ml...	8840_janssen
11	Toronto Hospital	Janssen_8840 0.9 ml...	External Transfer	20	Cancelled	5700 Yonge Street - ...		8840_janssen
12	Toronto Hospital	8845 null null - 11, ...	External Transfer	11	Cancelled	5700 Yonge Street		8842
13	Toronto Hospital	Pfizer null null - Lot ...	Internal Transfer	200	Cancelled	Toronto Hospital	Pfizer null null - Lot ...	Test inventory
14	Toronto Hospital	Covishield_8840 0.5 ...	Internal Transfer	20	Cancelled	Toronto Hospital	Covishield_8840 0.5 ...	Covishield_8840 - B...
15	Toronto Hospital	TEST MODERNA CO...	External Transfer	100	Cancelled	5700 Yonge Street - ...		MODERNA COVID...
16	Toronto Hospital	COVISHIELD VACCL...	Internal Transfer	200	Cancelled	Toronto Hospital	COVISHIELD VACCL...	COVISHIELD VACCI...
17	Toronto Hospital	COVISHIELD VACCL...	External Transfer	200	Cancelled	5700 Yonge Street - ...		COVISHIELD VACCI...

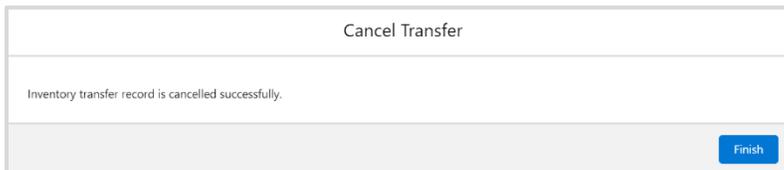
C. Cancelling Inventory Transfers

Description: For inventory transfers that have been sent and are still in the 'In Transit' status, users can cancel the inventory transfer by clicking the **Cancel Transfer** button from the AO inventory record or the AO record. If the record is not in the 'In Transit' status, users will receive an error message.

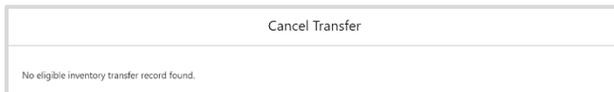
- From the AO inventory record, AO record, or the relevant transfer record, click **Cancel Transfer**.



- If cancelling from the AO inventory record or the AO record, a list of eligible inventory records for cancellation (must be within the user's AO and in the status 'In Transit') will be displayed. Select the appropriate inventory record for cancellation, click **Next**, then **Finish**.



- If cancelling from an inventory transaction record, users will be immediately brought to the cancel confirmation page, and should click **Finish**.
- If no records are eligible, an error message will be displayed.



- Once the cancellation has been successful, the inventory transfer record's status will change to 'Cancelled' and the inventory transaction record's reason will be updated.



10. Accepting Inventory Transfers

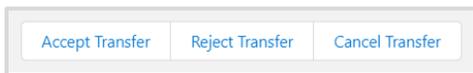
Description: Once an inventory transfer has been sent, the receiving AO must accept the inventory transfer to complete the inventory transfer process. Or, if the inventory transfer was sent in error, the transfer can be rejected. Inventory transfers can only be accepted when they are in the 'In Transit' status, otherwise users will receive an error message.

Proceed to the appropriate section:

- Accepting Transfers Within the Same AO (internally)
- Accepting Transfers Between Different AOs (externally)
- Rejecting Inventory Transfers.

A. Accepting Transfers Within the Same AO (internally)

1. Inventory transfer acceptance can be initiated from:



a. AO record

- Navigate to the **Authorized Organization** tab and locate your AO. From the AO record page, click **Accept Transfer**.

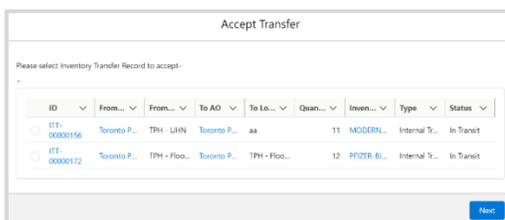
b. Inventory transfer record

ID	Product List	Quant...	From AO	Status	Created Date
IT-00000790	PFIZER-BIONTECH COVID-19 VACCINE mRNA - 125 2022/07/01	2	5700 Yonge Street - MOH	In Transit	2021-08-08 1:15 PM
IT-00000828	MODERNA COVID-19 mRNA 1273 - 42042 2022/07/08	12	Toronto Hospital	In Transit	2021-09-02 4:22 PM
IT-00000868	MODERNA COVID-19 mRNA 1273 - 49306 2021/01/31	555	Toronto Hospital	In Transit	2021-09-20 9:04 AM

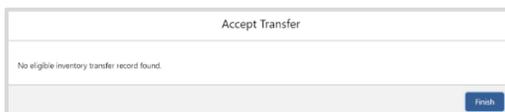
- **Option 1** – navigate to the **Authorized Organization** tab and locate your AO. From the AO record, select the **Transfers In/Out** tab, where users can see all of the AO’s inbound and outbound transfers. To view all transfers pending acceptance, under *Inventory Transfers – Inbound* click **View All**. Sort or filter the list of transfers by the status ‘In Transit’. Select the appropriate inventory transfer record within the **ID** column. From the inventory transfer record, click **Accept Transfer**.
- **Option 2** – from the **Inventory** tab, navigate to the inventory record that the transfer was sent from. Select the **Transfers In/Out** tab, and select the appropriate inventory transfer record within the **ID** column. From the inventory transfer record, click **Accept Transfer**.

2. If accepting the AO record (step 1a above), a list of eligible inventory records for acceptance (must be within the user’s AO and with the status ‘In Transit’) will be displayed. Select the appropriate record for acceptance, click **Next**, then **Finish**.

3. If accepting the inventory record (step 1b above), users will be immediately brought to the acceptance confirmation page and should click **Finish**.



4. If no records are eligible, an error message will be displayed.



5. The existing inventory transfer record will be updated from the status ‘In Transit’ to the status ‘Received’.

Information	
Quantity	12
Status	Received

B. Accepting Transfers Between Different AOs (externally)

1. Inventory transfer acceptance can be initiated from:



a. AO record

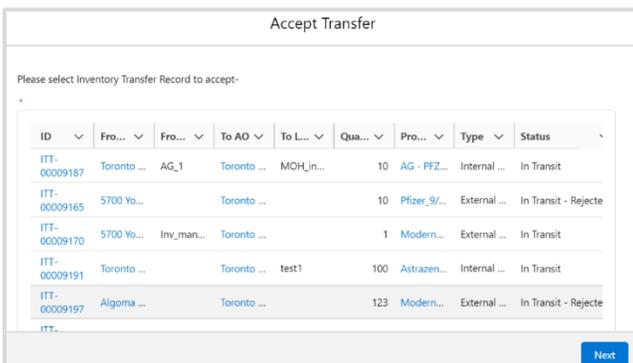
- Navigate to the **Authorized Organization** tab and locate your AO. From the AO record page, click **Accept Transfer**.

b. Inventory transfer record

ID	Product List	Qty	From AO	Status	Created Date
IT-0000790	PFIZER-BIONTECH COVID-19 VACCINE mRNA - 125 2022/07/01	2	5700 Yonge Street - MOH	In Transit	2021-08-08 1:15 PM
IT-0000828	MODERNA COVID-19 mRNA 1273 - 42010 2022/07/08	12	Toronto Hospital	In Transit	2021-09-02 4:22 PM
IT-0000868	MODERNA COVID-19 mRNA 1273 - 189306 2021/01/31	555	Toronto Hospital	In Transit	2021-09-20 9:04 AM

- **Option 1** – navigate to the **Authorized Organization** tab and locate your AO. From the AO record, select the **Transfers In/Out** tab, where users can see all of the AO’s inbound and outbound transfers. To view all transfers pending acceptance, under *Inventory Transfers – Inbound* click **View All**. Sort or filter the list of transfers by the status ‘In Transit’. Select the appropriate inventory transfer record within the **ID** column. From the inventory transfer record, click **Accept Transfer**.
- **Option 2** – from the **Inventory** tab, navigate to the AO inventory record that the transfer was sent from. Select the **Transfers In/Out** tab, and select the appropriate inventory transfer record within the **ID** column. From the inventory transfer record, click **Accept Transfer**.
- **Option 3** – from the **Inventory Transfers** tab, select the ‘Transfers in AO’ to see the transfers that have been sent to your AO. Select the accurate inventory ID to open the transfer record. Click **Accept Transfer**.

2. If accepting the AO record (step 1a above), a list of eligible inventory records for acceptance (must be within the user’s AO and with the status ‘In Transit’ or ‘In Transit – Rejected’) will be displayed. Select the appropriate record for acceptance, and click **Next**.



3. After clicking **Next**, or if accepting from the inventory transfer record, users will be prompted to select a storage location. Only ‘Active’ storage locations will appear for selection (see section 5 ([Create and Edit Storage Location Records](#)) for details).

If there is no appropriate storage location, users can leave the **No Storage Location** button toggled to 'No', click **Next**, then click **Finish**. A storage location can be added to the inventory record after the acceptance process, if needed.

The screenshot shows a form titled "Accept Transfer". Below the title, it says "Please Select Storage Location". There is a toggle switch for "No Storage Location" which is currently turned off (to the left), with "Yes" written below it. At the bottom right of the form, there are two buttons: "Previous" and "Next".

4. If there is an appropriate storage location, toggle the **No Storage Location** button to 'Yes' and select from the list. If an inventory record already exists for the accepted doses, the record details will appear on the screen. Click **Next**, then **Finish**.

The screenshot shows the "Accept Transfer" form with the "No Storage Location" toggle switched to "Yes" (to the right). Below the toggle, a list of storage locations is visible. The first item is selected: "591 Fridge" with a radio button. Below this, the word "Refrigerator" is displayed. To the right of the list, there are four dropdown menus: "Storage Type" (set to Refrigerator), "Storage Capacity" (set to 5), and "Temperature".

5. The inventory transfer record for the transferred inventory will be updated as follows:

- If the status was 'In Transit', it will be updated to 'Received'.

Information	
Quantity	100
Status	Received

- If the status was 'In Transit – Rejected', it will be updated to 'Received – Rejected'. This status is only used when an inventory record has been rejected and transferred back to the sending AO for re-acceptance.

6. The existing inventory transaction record will be updated to 'Received'.

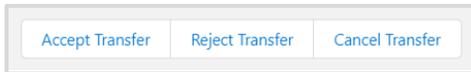
Further Context

- An inventory record in the status 'In Transit – Rejected' cannot be cancelled or rejected, it can only be accepted.
- If the inventory's status was 'Completed' and additional doses are added, the status will automatically change to 'Available'.
- Users at the transferring AO can accept back the transfers that were rejected from the receiving AO and are in the status 'Rejected – In Transit' (see section c below for more details on rejecting transfers).

C. Rejecting Inventory Transfers

Description: Once an inventory transfer is sent, the receiving AO can reject the transfer if necessary. Once rejected, the inventory doses will be transferred back to the sending AO, who must re-accept the transfer. Inventory transfers can only be rejected when they have a status of 'In Transit', otherwise users will receive an error message.

1. Inventory transfer rejection can be initiated from:



a. **AO record**

- Navigate to the **Authorized Organization** tab and locate your AO. From the AO record page, click **Reject Transfer**.

b. **Inventory transfer record**

ID	Product Lot	Quan...	From AO	Status T	Created Date
1	PFIZER-BIONTECH COVID-19 VACCINE mRNA - 121 2022407-01	2	5700 Yonge Street - MOH	In Transit	2021-08-08 1:15 PM
2	MODERNA COVID-19 mRNA 1273 - 42010 2022407-08	12	Toronto Hospital	In Transit	2021-09-02 4:22 PM
3	MODERNA COVID-19 mRNA 1273 - 189906 2021-01-01	555	Toronto Hospital	In Transit	2021-09-30 9:04 AM

- **Option 1** – navigate to the **Authorized Organization** tab and locate your AO. From the AO record, select the **Transfers In/Out** tab, where users can see all of the AO's inbound and outbound transfers. To view all transfers pending acceptance, under *Inventory Transfers – Inbound* click **View All**. Sort or filter the list of transfers by the status 'In Transit'. Select the appropriate inventory transfer record within the **ID** column. From the inventory transfer record, click **Reject Transfer**.
- **Option 2** – from the **Inventory** tab, navigate to the AO inventory record that the transfer was sent from. Select the **Transfers In/Out** tab, and select the appropriate inventory transfer record within the **ID** column. From the inventory transfer record, click **Reject Transfer**.
- **Option 3** – from the **Inventory Transfers** tab, select the 'Transfers in AO' to see the transfers that have been sent to your AO. Select the accurate inventory ID to open the transfer record. Click **Reject Transfer**.

2. If accepting the AO record (step 1a above), a list of eligible inventory records for rejection (must be within the user's AO and with the status 'In Transit') will be displayed. Select the appropriate record for rejection, click **Next**, then click **Finish**.

Reject Transfer

Please select inventory transfer record to reject:

From AO	From ...	To AO	To Location	Quantity	Product Lot	Type	Statu
<input checked="" type="radio"/>	Toronto Ho...	Toronto Pu...		12	MODERNA COVI...	External Tra...	In Tra
<input type="radio"/>	Toronto Ho...	Toronto Pu...		555	MODERNA COVI...	External Tra...	In Tra

Next

3. If no inventory records are eligible, an error message will display.

4. A new inventory transfer record will be returned to the sending AO (with the status 'In Transit – Rejected') for re-acceptance with an accompanying inventory transaction (refer to section 9 ([Transfer Inventory](#)) for details on accepting inventory transfers).
5. The existing inventory transfer record will be updated with the status 'Rejected', and the inventory transaction record's **Status or Reason** field will be updated to 'Rejected'.

Notes

- Do not edit any fields on the received inventory transfer record before the inventory has been accepted.
- On the AO inventory record, in the **Details** tab under the section *Doses Transferred & In Transit*, the following fields will summarize the inventory transfers for that inventory record:

Field	Description
Doses Moved – In	Number of doses that have been received from an internal transfer
Doses Relocated – In	Number of doses that have been received from an external transfer
Doses in Transit – Out	Number of doses that have been sent from the AO still in the 'Pending for Transfer' status
Doses Moved – Out	Number of doses that have been internally transferred and successfully accepted
Doses Relocated – Out	Number of doses that have been externally transferred and successfully accepted

11. Manage Recalls

Description: Recalls may occur due to an issue with a specific lot of inventory, such as a higher AEFI rate than expected, an identified shipment issue that impacted the inventory, etc., and can be identified by:

- Manufacturer notifies Health Canada
- Health Canada notifies the provinces/territories
- Public Health Ontario notifies the Ministry of Health

Health Canada (and often the manufacturer) will perform an investigation of the impacted lot number and communicate to the users (outside of COVaxON) on next steps. This is in the form of notice to the province on further use of the vaccine (e.g., discard or lift the suspension so the vaccines can be distributed for use). Public Health Ontario/MOH would inform PHUs who inform their local providers (users of COVaxON). Only users with the profile of MOH super user or provincial inventory manager can record recalls and rescinds within COVaxON.

A. Document a Recall

1. Identify the impacted lot number that has been recalled.

The screenshot shows a web form for a Product Lot record. The title is "Product Lot Moderna - 27856, 2021/08/18". Under the "Information" section, there are fields for Product Lot Name (Moderna - 27856, 2021/08/18), Product (Moderna), Lot Number (27856), and Status (Active). Under the "Recall Information" section, there are fields for Recall Date (2021-08-19), Recall Source (Health Canada), and Record Date (2021-08-21). Red boxes highlight the Status field and the Recall Date, Recall Source, and Record Date fields.

2. Click on the **pencil icon** to the right of any field to edit the product lot record.
3. From the product lot record, select the 'Recalled' status from the dropdown. Once the status on the inventory record is set to 'Recalled', the status on all associated inventory records will also change to 'Recalled'.
4. Select a **Recall Date** from the calendar (only current or past dates will be accepted, otherwise the user will receive an error).
5. Select a **Recall Source** from the dropdown.
6. Click **Save**.

Note: When a lot record is saved, the status of all AO inventory records will be set to 'Recalled', and the inventory will be frozen, rendering the inventory unavailable for administration. Functions such as reporting wastage, reporting excursions, and/or transferring doses will be unavailable. Therefore, the only way to *unfreeze* inventory is to rescind a recall (details below).

B. Rescind a Recall

Description: The PHU will advise AOs of the outcome of the recall investigation and provide recommendations on the use of the inventory (communication is done outside of COVaxON). If the inventory is determined to have no safety issues, the PHU will notify all users that the inventory can be redistributed for administration and MOH super users and provincial inventory managers can rescind the recall within COVaxON.

1. From the product lot record, select the correct inventory **Status** option ('Available', 'Inactive', or 'Expired'). The status on all associated inventory records will be updated.

If a product lot record is set to one of these statuses, all associated inventory records will be in the following status(es):

- **Active** – either the ‘Available’ or ‘Completed’ status
- **Inactive** – the ‘Suspended for Vaccines’ status
- **Expired** – the ‘Suspended for Vaccines’ status

2. Select a **Rescind Date** from the calendar. The **Rescind Date** cannot occur before the **Recall Date**, otherwise the user will receive an error.
3. Manually delete the **Recall Date** and the **Recall Source** from the product lot record.
4. Click **Save**.

Note: If an inventory is recalled multiple times, users would need to remove the **Rescind Date** before recalling the inventory again. The history of the initial recall and rescind are captured in the product lot history.

Appendix A | Inventory Profiles and Access

User Profile	Create	Read	Edit	Delete	View All	Tab: On
COVax Site Super User	✓	✓	✓	✗	✗	✓
COVax Vaccinator	✗	✗	✗	✗	✗	✗
COVax Site Staff	✗	✗	✗	✗	✗	✗
COVax PCP Vaccinator	✗	✗	✗	✗	✗	✗
COVax Inventory Manager	✓	✓	✓	✗	✗	✓

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