02 Create Vaccination Event (VE)

Ontario

Create Vaccination Event

Create and manage a vaccination event (VE) record associated to an authorized organization (AO) to enable vaccinations at that location.

Profiles

Inventory Manager, Site Super User

Core Tasks

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

#	Section	Description
1.	**Create a New Vaccination Event**	Create a vaccination event (VE) within the appropriate AO
2.	**Setup Vaccination Event**	Associate a vaccine event Inventory (VEI) to the VE
3.	**Monitor Vaccination Events**	Monitor daily operations within a VE by viewing inventory availability and progress of clients

Additional Information

- **Vaccination Events (VEs)** – a record type that represents the location where vaccinations are physically being administered. For example, hospitals, clinics, pharmacies, mass immunization clinics, long-term care homes, retirement homes, nursing homes, mobile/drive through clinics.

- **Authorized organizations (AOs)** – the organizations that own and allocate inventory to VEs. Once a VE is setup, clients can be linked to the VE and the vaccine administration process can begin. A VE is a vaccination clinic *event* to be delivered by an AO at a specified *venue*, and where vaccine stock, which is recorded on the AO's inventory records (IRs) and for which the AO has accountability, is planned to be used for client vaccinations.

- Refer to the **00 – Introduction to COVax$_{ON}$ and User Setup** job aid to learn more about your system access.

- **Vaccine Event Inventory (VEI)** – when an inventory manager is planning supply for a vaccination event and intends for the inventory to be tracked, the inventory manager creates a vaccine event inventory from the AO inventory records (IRs). The VEI tracks vaccine supply utilization for a vaccine event by linking one AO IR to one or more VEs, and one or more IRs may be used to supply one or more VEs. The vaccine event inventory is utilized by the vaccinators for the selection of product lots from inventory when administering doses to clients.

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. Create a New Vaccination Event

Description: Prior to the vaccination event (VE) start date, site super users and/or inventory managers must create a VE record as part of the planning phase for a new location (physical or mobile) that will be administering vaccinations.

1.   To create a VE, navigate to the Vaccination Events tab in COVax_{ON}. Select 'Organization's Vaccination Events' from the dropdown.

2.   Click **New** on the top right of the page.
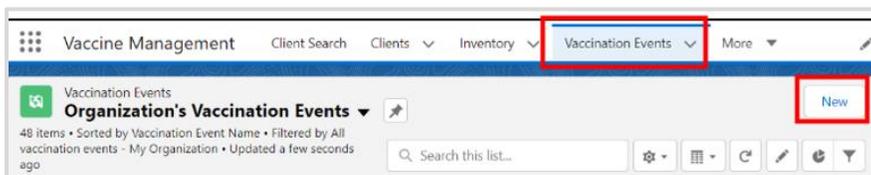
3.   Fill in the following information (* indicates a mandatory field):

- **Vaccination Event Name*** – naming convention: [Location] [City] [Unique Identifier (e.g., Date)]. Once the VE has started, it is important that the name does not change. Commas cannot be entered in the VE name.

- **Status*** – indicate the status of the VE; 'Active' indicates that the VE is available for dose administration

- **Vaccination Event Type*** – select the relevant type based on the event. The 'Other' option should only be used when a relevant VE type is not available for selection

- **Parent Vaccination Event** – select the relevant vaccination event

- **Authorized Organization*** – select the AO associated to the VE (this must be the same as the AO listed on the user's profile)

- **Phone** – enter the phone number

- **Fax** – enter the fax number

- **Web Site** – enter the web site address

- **Public Health Unit (PHU)** * – the PHU that the VE is associated with

- **Start Date** – indicate the first day of vaccinations. The date must be in the future since the VE will be created prior to its start date. Do not select a date that is in the past.

- **Inventory Tracked** (checkbox) **–** the checkbox is defaulted to checked, for tracked inventory and cannot be edited.
- **Vaccination Event #** - leave blank; the field will auto populate upon saving
- **Comments** – input any comments related to the VE

4.   Click **Save**.

Best Practice

- Vaccination event naming tips:

  - Maintain consistency in the name convention
  - Locations can choose an acronym for the AO (e.g., Toronto Public Health = 'TPH')
  - Do not use commas in the VE name

- VE names must not be changed once the VE status is 'Active'
- Search for a client using the VE record to associate it with the client

2. Setup Vaccination Event

Description: Once the vaccination event (VE) has been created, inventory or product lot can be allocated from the AO to the VE, and clients can be associated to that VE.

### A. Allocate inventory to a vaccination event (VE) or vaccine event inventory (VEI)

When an inventory manager is planning supply for a VE and intends for the inventory to be <u>tracked</u>, the inventory manager creates a vaccine event inventory (VEI) from the AO immunization records (IRs).

- The VEI tracks vaccine supply usage for a VE by linking one AO IR to one or more VEs, and one or more IRs may be used to supply one or more VEs.

- The VEI is used by the vaccinators for the selection of product lots from inventory when administering doses to clients.

- Linking existing AO inventory records to a VE creates a new unique vaccine event inventory (VEI) record, tied directly to the event. This allows vaccinators to select inventory when administering doses to clients at the VE.

- At the VE, doses are administered from the VEI, with **Doses Available** from the linked AO inventory record. As doses are administered, **Doses Available** from the linked AO inventory is decremented. If the status of the VEI is 'Active' and the status of the AO inventory is 'Available', the inventory can be selected for administration to clients at the VE.

- For vaccines that require a diluent, the diluent inventory must also be linked to the VE.

- One AO inventory record can be associated to multiple VEs.

- When the **Inventory Tracked** checkbox is checked, the VEI section is displayed on the VE screen. The following fields are displayed:

  - VE Inventory Name
  - VEI Status
  - Historical Allocated Doses
  - Extra Doses from Vail
  - Doses Administered
  - Doses Wasted

- In the example below, 1000 doses from the Toronto Public Health (TPH) AO were allocated to the Metro Toronto Convention Centre VE. Since the status of the AO inventory record is 'Available' and the status of the Metro Toronto Convention Centre VEI is 'Active', the inventory can be administered to clients at the VE.
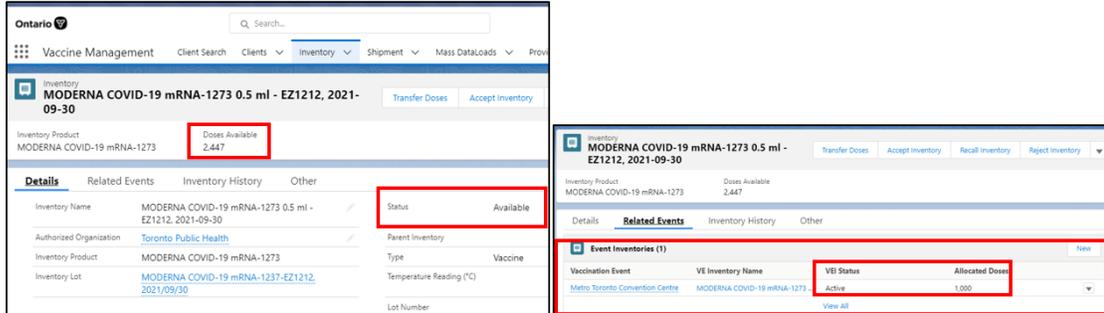
1. Navigate into the AO inventory record if it is not already open (**Inventory** tab > select inventory record).

2. Select the **Related Events** tab.

3. Click **New** to the right of *Event Inventories*.
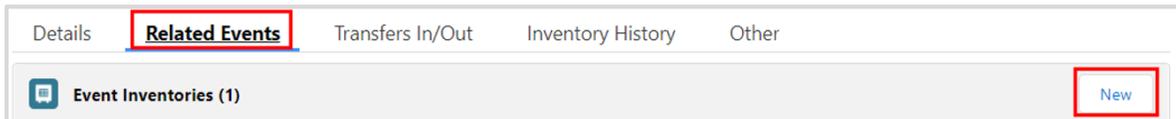
4. From the AO inventory record, enter the details for the new VEI:

- **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** – this field is 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 'Inactive' status, 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.   In the **Relevant Events** tab, select the relevant hyperlink under the **VE Inventory Name** column to open the VEI record.

Navigate to the **Related** tab under the *Inventory Reconciliations* section 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 user profiles have 'read' access to allocation transactions. No user profiles can edit allocation transactions.
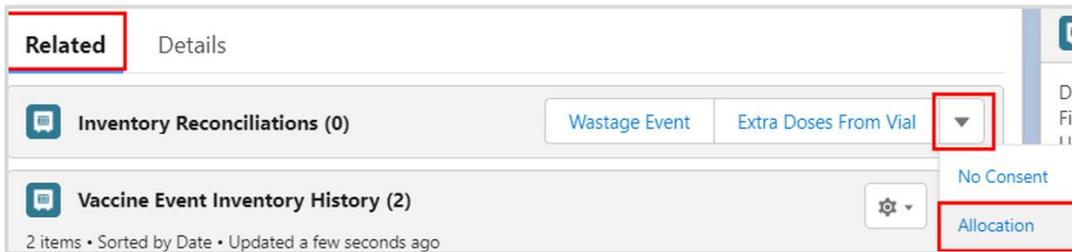
7. Enter the details for the **New Inventory Transaction Allocation** screen:

    - **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 quantity being allocated to the VE
    - **Notes** – enter optional notes for the allocation

8. Click **Save**.

9. The VEI record will be updated and displays the **Quantity** for this VEI.
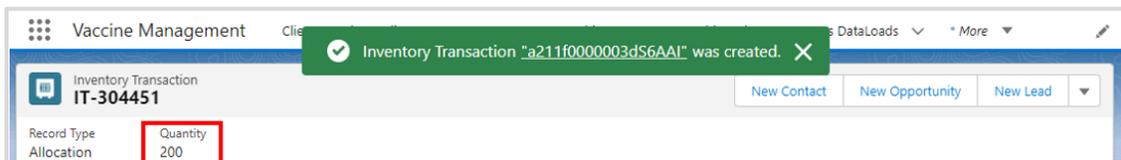
10. The AO inventory record gets updated and displays the allocation inventory transaction. After the inventory setup has been completed, the VEI record has been created and doses have been allocated, users can allocate additional doses to a VEI by starting from step 7 and creating a new allocation transaction. This process will increase the total **Allocated Doses** on the VEI record.

3. Monitor Vaccination Events

Description: All users can leverage the information found on the vaccination event records to monitor daily operations, view reports, client lists, or dose administration records that are associated to the VE.

A. Reports at the VE level

There are 2 reports available from the **Vaccination Event** page, which work to track clients and inventory availability. These reports can be found in the **Details** section of a VE record, under the section *Report Links*. From the VE record, select the relevant report.

1. **Showing Clients for Vaccination Event** report – all users can leverage this report for a centralized view of all clients at a specific VE and their associated dose information. This includes all dose administrations at the VE and any instances of adverse events following immunization (AEFI). For clients that have received two doses, the dose administration records are grouped together with the client's name.

2. **Event Inventory report** – all users can leverage this report to understand how much inventory is remaining at the VE level. AO inventory managers can also collect information on adjustments required to the main inventory record. Information on this report includes:

   - **Sum of Allocated Doses**
   - **Sum of Extra Doses from Vial**
   - **Sum of Doses Wasted**
   - **Sum of Doses Administered (No Consent)**
   - **Number of Administered Doses**
   - **Total Remaining Doses**

B. Viewing client records at the VE level

1. Client records can be accessed at any stage in the clinical flow from the VE on the **Related** tab.

2. Under the *Clients* section of the VE page, all clients associated with the VE are listed.

## C. Viewing VE immunizations at the VE level

1. Client immunization records can be accessed at any stage in the clinical flow from the VE on the **Related** tab.

2. Under the *VE Immunizations* section of the VE page, all dose administrations that occurred at the VE will be listed.

3. If necessary, dose administration records status can be updated by site super users after the dose has been administered to the client by leveraging the Review Dose Administered functionality. Refer to the **04 – New Immunization Record - Administered** job aid for more details.


D. Viewing vaccination event inventory records

- Event inventory records can be accessed from the VE on the **Details** tab. This is the inventory (originally from the AO) that has been linked to the VE.

- Adjustments to inventory can be made from either the AO or the VE level. For details on how to reconcile inventory between AO and VE records, refer to the **01 – Inventory** job aid.

- The following descriptions and images display AO and VE inventory records in COVax_{ON}:

  - The **AO Inventory** record has the title 'Inventory' in the top left corner of the record. When viewing this record, you can also see the allocated 'Vaccine Event Inventory' (or vaccine event inventory) from the **Related Events** tab of the inventory record. When selected, the user can see that the VEI record has the title 'Vaccine Event Inventory' on the top left corner of the record.
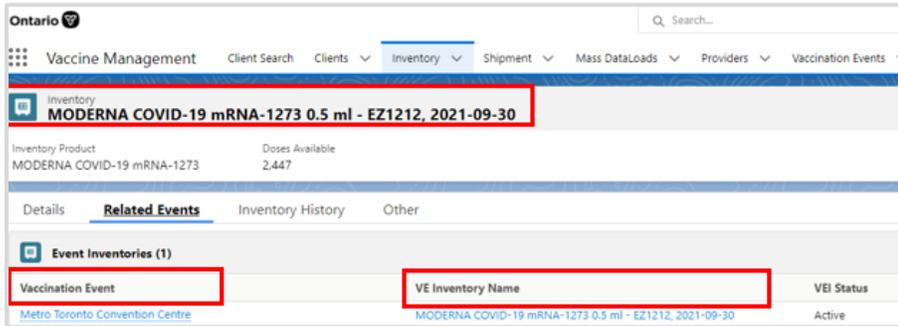
- The VE Inventory record can be seen from the AO inventory record, or it can be accessed directly from the vaccination event record.
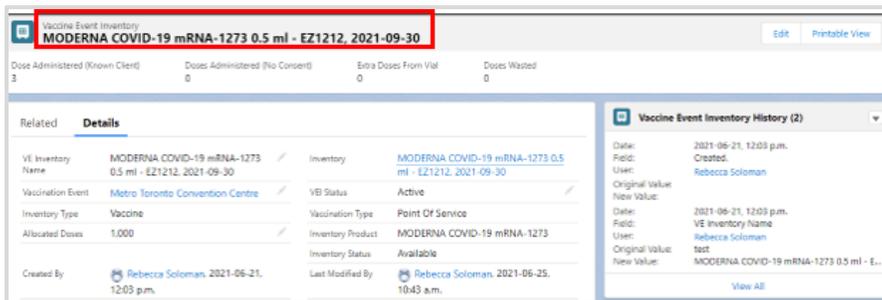
Appendix A | Vaccination Event Profiles and Access

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 COVax_ON and clear the browser cache. Refer to the **01 – Introduction to COVax_ON and User Setup** job aid for detailed steps. Sanitize shared devices in accordance with location protocols.