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.

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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 when searching for a particular person. The information is presented this way 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):

		tett vacch	action event		
information					
Vaccination Event			Phone		
•Status	New	•	Fax		
Alias			Website		
Vaccination Event Type	None	•	industry	None	
Site Location	Latitude		Authorized • Organization	Search Authorized Organizations	(
	Longitude				
Public Health Unit	Search PHU Masters	Q,	•Start Date		1
Inventory Tracked	V		Vaccination Event #		
			Comments 0		
ocation					
Street			Postal Code		
		11			
City			Province		
Country					
ystem information					

- 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 <u>not</u> 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

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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).

New Vaccination Event									
Information									
Vaccination Event Name			Phone						
* Status	New		Fax						
Alias			Website						
Vaccination Event Type	None		Industry	None	•				
Site Location	Latitude		Authorized • Organization	Search Authorized Organizations	Q				
	Longitude								
Public Health Unit • (PHU)	Search PHU Masters Q		* Start Date		ä				
Inventory Tracked	v		Vaccination Event #						
			Comments 0						
					11				

- 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.

Ontario 🞯	Q Search			
Vaccine Managen	nent Client Search Clients V Inventory V Si	hipment 🗸 Mass DataLoads 🗸 Provi		
MODERNA COV 09-30	D-19 mRNA-1273 0.5 ml - EZ1212, 2021-	Transfer Doses Accept Inventory		
Inventory Product MODERNA COVID-19 mRNA	-1273 Doses Available 2,447		ModeRoy MODERNA COVID-19 mRNA-1273 0.5 ml - Itanifer Doses Accept Inventory Recall Inventory EX1212, 2021-09-30	Reject I
Details Related E	ents Inventory History Other		Inventory Product Doses Available MODERNA COVID-19 mRNA-1273 2.447	
Inventory Name	MODERNA COVID-19 mRNA-1273 0.5 ml - // EZ1212, 2021-09-30	Status Available	Details Related Events Inventory History Other	
Authorized Organization	Toronto Public Health	Parent Inventory		
Inventory Product	MODERNA COVID-19 mRNA-1273	Type Vaccine	Event inventories (1)	
Inventory Lot	MODERNA COVID-19 mRNA-1237-EZ1212. 2021/09/30	Temperature Reading (*C)	Vaccination Event VE Inventory Name VEI Status Allocated Doses Metro Toronto Convention Centre MODERNA COVID-19 mRNA-1273 Active 1,000	
		Lot Number	View All	

- 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*.

Details	Related Events	Transfers In/Out	Inventory History	Other	
Event	Inventories (1)				New

- 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.

Γ	Nev	v Vaccine Event Invento	pry		
	Information				
		5			
	*VE Inventory Name	inventory	aAa_sTRA_double1 null r	nl X	
	*Vaccination 🔯 NYGH Toronto 030 Event	92022 X VEI Status	Active	▼	
	Comments 🕦				
-	Allocated Doses	<u>li</u>			
	Ca	ancel Save & New Save			
Click Save . Th	ne new VEI record will be cre	eated.			
	New	v Vaccine Event Invento	ry		
þ	Information				
		5 * Inventory	aAa sTRA double1 null n	nl ×	
	*VE Inventory Test 2 Name	5		5	
	*Vaccination 🔯 NYGH Toronto 030 Event	92022 × VEI Status	Active	•	
	Comments 🚯				
	Allocated Doses				
	Ca	incel Save & New Save			
lastic Deli	at Franks tak a datat tak			News column to	
. In the Releva	nt Events tab, select the rei	evant nyperlink und	er the VE Inventory	Name column to op	en the VEI record.
C	Event Inventories (3)			尊 -	C ^t New
3 it	Vaccination Event	VE Inventory Name	V VEI Status	V Last Modifi V Allocat	ted D.,, V Ext
	1	aAa_sTRA_double1 null ml - 12345	12345123451234 Active	2021-09-16, 2:1 11	1
2	2 NYGH Toronto 03092022	aAa_sTRA_double1 null ml - 1234	12345123451234 Active	2022-03-09, 2:3 200	0
з	3 NYGH Toronto 03092022	aAa_sTRA_double1 null ml - 12345	12345123451234 Active	2022-03-09, 2:4	0

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.

View All

02	Creat	te Vaccination Event (VE)		Ontario 😵
		Related Details	G	
		Inventory Reconciliations (0)	Wastage Event Extra Doses Fi	rom Vial
		Vaccine Event Inventory History (2) 2 items • Sorted by Date • Updated a few seconds ago		Image: No Consent Allocation
7.	Enter the d	details for the New Inventory Transaction Allo	cation screen:	
8.	• • Click Save .	Inventory* – (required field) auto populated Vaccine Event Inventory* – (required field) a Quantity* – (required field) enter the quantit Notes – enter optional notes for the allocatio	vith the inventory name ito populated with the VE invento / being allocated to the VE n	ory name
		New Inventory Tra	nsaction: Allocation	
		* Inventory aAa_sTRA_double1 null ml X * Quantity 200	* Vaccine Event Inventory Notes	null ml 🗙
		Cancel	& New Save	
9.	The VEI red	cord will be updated and displays the Quantit	for this VEI.	
		Inventory Transaction Clie Inventory Transaction Inventory Transaction IT-304451 Record Type Allocation 200	on <u>"a211f0000003dS6AAI"</u> was created. X	New Opportunity New Lead
10.	The AO inv completed starting fro record.	ventory record gets updated and displays the a l, the VEI record has been created and doses h om step 7 and creating a new allocation transa	llocation inventory transaction. A ave been allocated, users can allo ction. This process will increase t	After the inventory setup has been ocate additional doses to a VEI by he total Allocated Doses on the VEI
		Shipment Doses Received & Reconciliations (2) items • Sorted by Created Date • Updated a few seconds ago		\$ * ~
		Inventory T $ \lor $ Record Type $ \lor $ Quantity	\sim Vaccine Event Inventory \sim V	accination \vee Notes \vee
		1 IT-154135 Allocation 555	PFIZER-BIONTECH COVID-19 VACCIN	anterbury Place

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.

Vaccination Event NEW VE inv tracked	Edit	New Immunization
Vaccination Event Type Hospital-based Clinic		
Related		
> Information		
> Location		
> System Information		
✓ Report Links		
Showing Clients for Vaccination Event Event Inventory Report		

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.

Showing Clients for Vaccination Event										C ⁴ Edit V
Total Records Total Client 2 0	Teni Renords Tenis Clanet Juny Advence Tearen III									
Client: Total Doses 🕆 💌	Client: Service Status 🕇 💌	Client: Client Name 💌	Veccination Date	Client: Health Card Number / COVID ID 💌	Client: Person Account: Birthdate 💌	Client: Age 💌	Client: Gender 💌	Status 💌	Client: Vaccination Event: Vaccination Event Name	Client: Any Adverse Even
2 (2)	New (2)	Green Apple	2022-03-22, 12:59 p.m.	1212121212	1987-06-22	34 Years 9 Month(s)	Male	Administered	Peel 2 VE	
		Creen Apple	2022-03-24, 8:57 a.m.	1212121212	1987-06-22	34 Years 9 Month(s)	Male	Administered	Peel 2 VE	

- 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

Beport: Event in Event Inver Data shown for the las	mentory with Dose Ad ntory Report at 30 days							9	Add Chart 🛛 🍸 🖓	Edit 💌
Total Allocated Doses 2,200	Total Doses Wasted 0	Total Extra Doses From Vial O	Total Doses Administered (No Con 0	Total Dase Administered (12	Inown C Total Remain 2,188	ning Doses Doses Admin (Sele 12	cted Filter Inter			
Vaccine Event Invento	ry ID 🕇 💌 VE loves	story Name 🕆		* Sum of Allocated Dose	s Sum of Doses Wasted	Sum of Extra Doses From Vial	Sum of Doses Administered (No Consent)	Sum of Dose Administered (Known Client)	$f_{\rm f}$ Total Remaining Doses $ $ *	fr Doses Ac
is10000005v2d	MODERI	NA COVID-19 mRNA-1273 0.5 m	ni - Lat_JZ_MOD_01, 2021-12-18	1.00	0 0	0	0	- 11	905	3
a11310000005v2s	PROFR-1	SIGNTECH COVID-19 VACCINE /	nRNA (double) 0.9 ml - 8079881, 2022-0	L. 1,20	0 0	0	0		1,196	3
Total				2,20	o o	0	0	12	2,188	1

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.

Vaccination Event Peel 2 VE				Edit New Immunization
Veccination Event Type Mass Immunization Clinic				
Related Details				
Clients (4)				
Client Name	Health Card Number / COVID ID	Birthdate	Age	
Green Apple	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	1987-06-22	34 Years 9 Month(s)	Y

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.
- 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.

VE Immunizations (6+)						
l	Client	Status	Dose Administration	Vaccination Date		
l	Kerry Jarvis	In Progress	DA-20448757	2021-12-28, 1:07 AM	-	
L	Meera Joshi	In Progress	DA-20448761	2021-12-28, 1:23 AM		

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 COVaxon:
 - 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.

Ontario 🞯					Q Search						
	Vaccine Management	Client Search Clients 🗸	In	wentory 🗸	Shipment 🗸	Mass DataL	oads 🗸	Provider	s v	Vaccination Events	~
	Inventory MODERNA COVID-19 r	nRNA-1273 0.5 ml -	EZ12	212, 2021-	09-30))	
Inven MOD	tory Product DERNA COVID-19 mRNA-1273	Doses Available 2,447									
De	tails Related Events	Inventory History	Ot	her	\mathcal{I}				11		
	Event Inventories (1)	_									
Vaccination Event				VE Inventory Name						VEI Status	
Metro Toronto Convention Centre			MODERNA COVID-19 mRNA-1273 0.5 ml - EZ1212, 2021-09-30						Active		

• The VE Inventory record can be seen from the AO inventory record, or it can be accessed directly from the vaccination event record.

MODERN	Inventory A COVID-19 mRNA-1273 0.5 n	nl - EZ1212, 2021-	09-30		Edit Printable View	
ose Administered (Kn	own Client) Doses Administered (No 0	Consent) Extra D O	oses From Vial Doses Wasted 0			
Related De	tails			U Vaccine E	vent Inventory History (2)	
VE Inventory Name	MODERNA COVID-19 mRNA-1273 0.5 ml - E21212, 2021-09-30	/ Inventory	MODERNA COVID-19 mRNA-1273 0.5 ml - EZ1212, 2021-09-30	Date: Field: User:	2021-06-21, 12:03 p.m. Created. Rebecca Soloman	
Vaccination Event	Metro Toronto Convention Centre	/ VEI Status	Active /	Original Value: New Value:		
Inventory Type	Vaccine	Vaccination Type	Point Of Service	Date:	2021-06-21, 12:03 p.m.	
Allocated Doses	1,000	/ Inventory Product	MODERNA COVID-19 mRNA-1273	User	Rebecca Soloman	
		Inventory Status	Available	Original Value:	test MCCGERNA COMID-19 mRNA-1273-0.5 ml - 5	
Created By	Rebecca Soloman, 2021-06-21, 12:03 p.m.	Last Modified By	Rebecca Soloman, 2021-06-25, 10:43 a.m.	View All		

Appendix A | Vaccination Event Profiles and Access

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

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.