08 Exemptions

Ontario

Exemptions

Record exemption information on the client record in COVax_{ON}.

Profiles

User Profiles with exemption permission

Activities

This job aid covers the following key sections. **Click the relevant link**:

#	Section	Description
1.	Create a New Exemption	Create a new exemption for a client

Important Note for all COVax_{ON} Users

Users should NOT be creating test/dummy data in the COVax_{ON} production environment. Alternatively, there is a COVax_{ON} training environment that can be leveraged by users to practice using test/dummy data. Details for accessing this environment are located on the MOH SharePoint site accessible to site leads.

Disclaimer

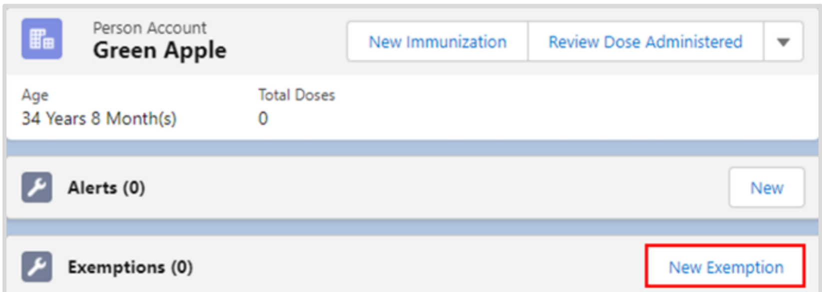
Data Privacy: Users with access to COVax_{ON} can see the demographic details and HCNs of other clients in the system when searching for a particular person. The information is presented this way when searching for a particular person. The information is presented this way to help ensure that users access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

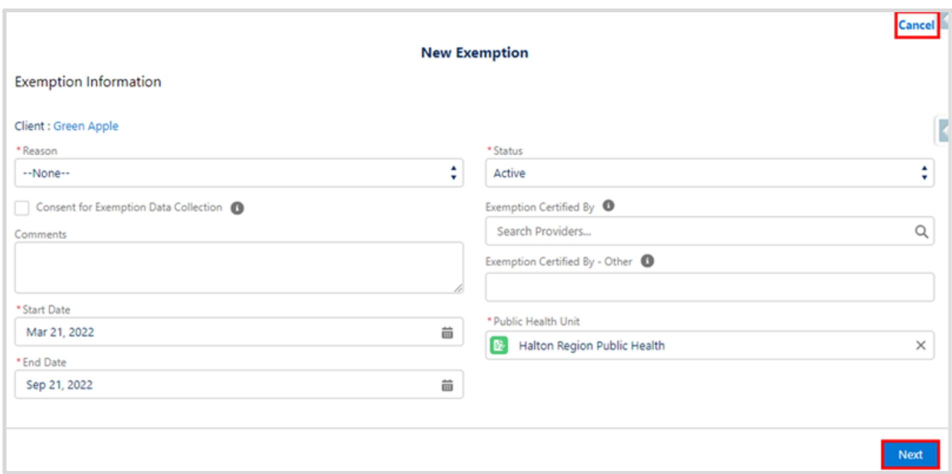
1. Create a New Exemption

Description: Once the client record has been located and opened in COVaxON, add or review any exemption on the record. Once recorded, proceed with saving the information on the client record.

1. From the client's record, under the *Exemptions* section, click **New Exemption**.



2. Populate the following exemption fields, then click **Next**. (Note that a new exemption opened in error can be discarded by clicking **Cancel**.)

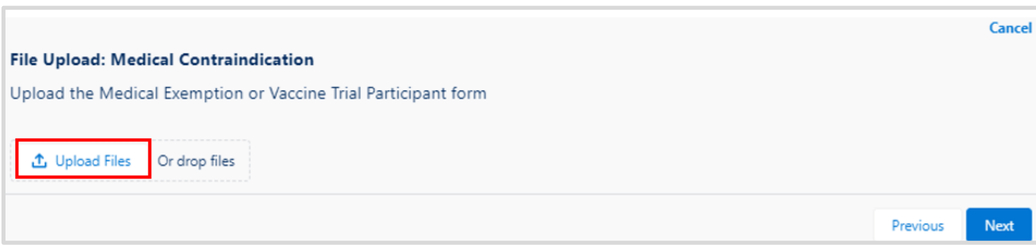


- **Client** – defaults to the client in context and cannot be edited
- **Reason*** – (required field) select reason 'Medical Contraindication' or 'Vaccine Trial Participant'
- **Consent for Exemption Data Collection*** – (required field) enable checkbox to confirm client has given consent for the data to be collected
- **Comments** – input any comments about the exemption not captured in the designated fields
- **Start Date*** – (required field) the date the exemption is effective; defaults to the current date but can be edited (the date cannot be in the future)
- **End Date*** – (required field) the date the exemption is effective to; defaults to six months from the current date and is editable
  - Users should update the end date to the date indicated on the medical exemption form or vaccine trail participation form/letter.

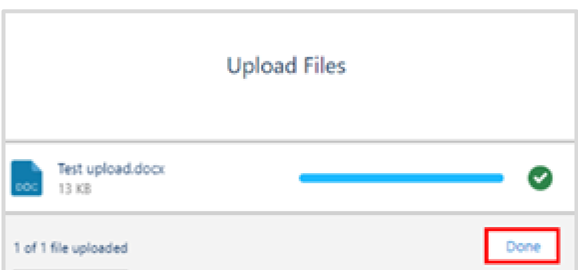
- If an end date has not been provided, users should use the default of six months from the start date (the end date cannot be before the start date).
- Note that the end date is defaulted to six months from the current date; if the start date has been edited, users should also edit the end date accordingly.

- **Status*** – (required field) defaults to ‘Active’ when creating the record, and is editable
- **Exemption Certified By** – the physician or registered nurse in the extended class (nurse practitioner) that certified the medical exemption or COVID-19 vaccine clinical trial principal investigator (physician or nurse practitioner)
- **Exemption Certified By – Other** – input the first name and last name of the COVID-19 clinical trial principal investigator if not found in the **Exemption Certified By** look-up field; either **Exemption Certified By** <u>or</u> **Exemption Certified By – Other** fields must be completed (mandatory) in the flow to save the exemption record
- **Public Health Unit*** – defaults to the PHU of the user’s AO at the time the exemption is created, and is editable

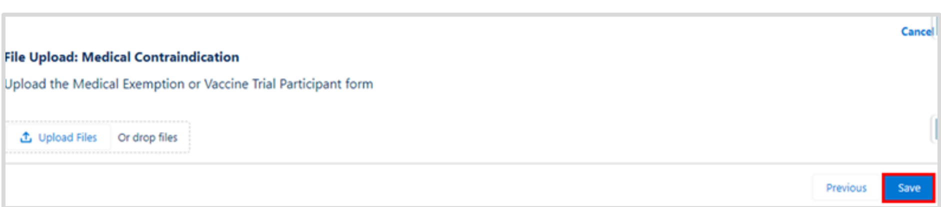
3. When creating an exemption record, it is mandatory to upload the supporting documentation files. To upload the files, click **Upload Files** to select the file or select **Or drop files** to drag and drop the file.

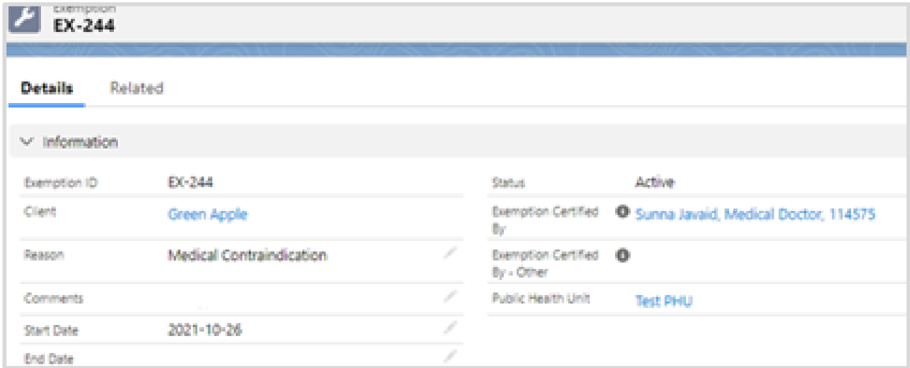


4. Once the file has been uploaded, click **Done**.

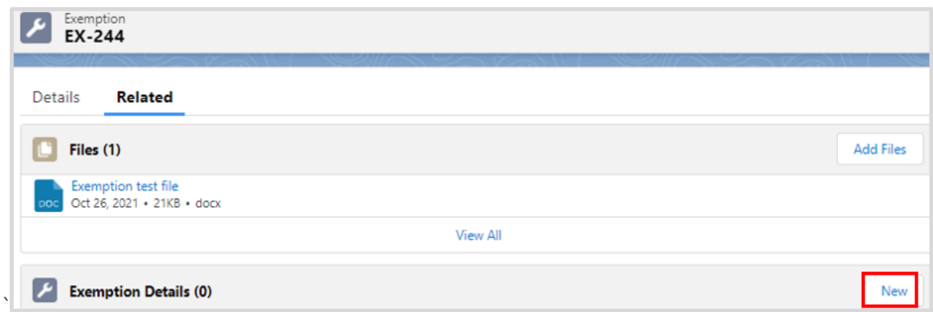


5. To continue to create the record, click **Save.** To return to the previous screen, click **Previous**. To discard the new record from this screen, click **Cancel**.

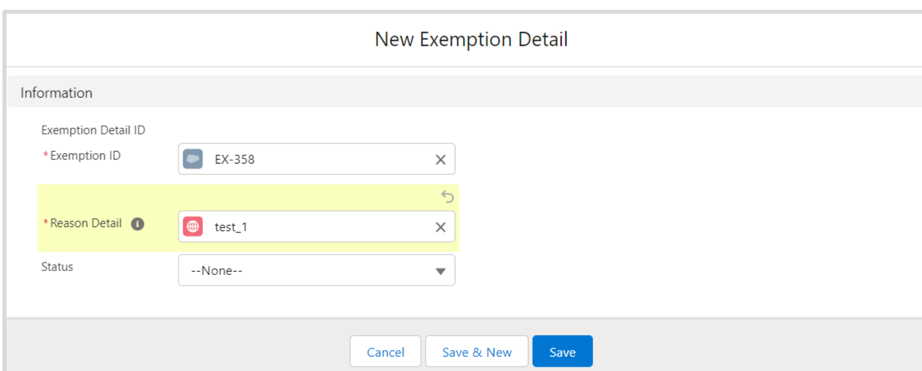




6. For medical contraindications, users must create an **Exemption Details** record to document the conditions and/or adverse events following immunization (AEFI) that qualify the client for the medical exemption. Note that steps 6 and 7 do not apply for vaccine trial participants. Go the exemption records **Related** tab and click on **New** in the *Exemptions Details* section.



7. Select the **Reason Detail**, then click **Save.**

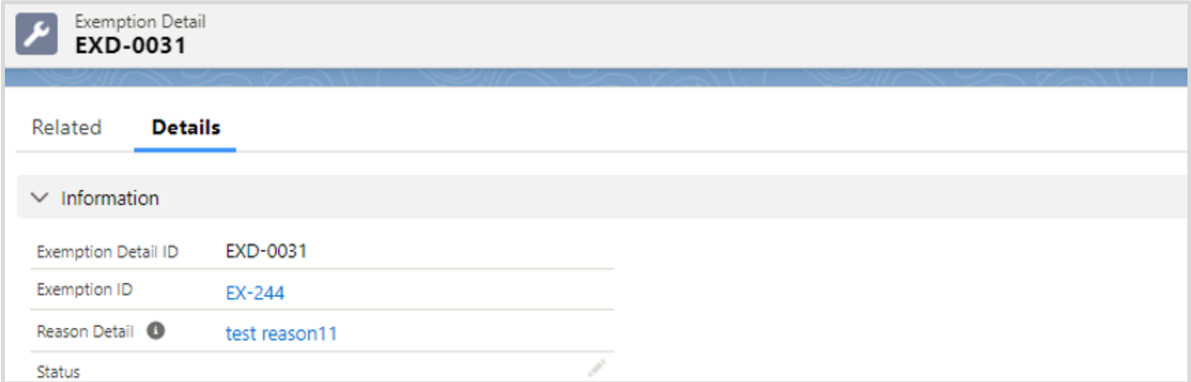


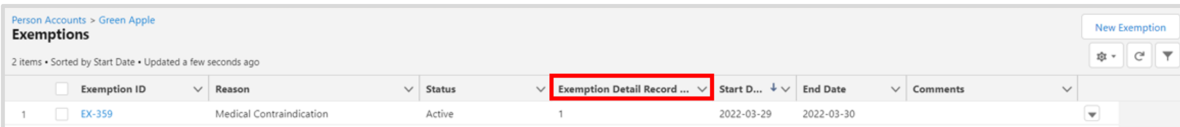
- **Exemption Detail ID*** – (required field) system generated when a new record is created
- **Exemption ID*** – (required field) defaults to the ID for the exemption record; do not edit the defaulted ID
- **Reason Detail*** – (required field) search and select the conditions and/or AEFI that qualifies the client for a medical exemption
- **Status** – defaults to ‘blank’; can be used to mark an exemption detail as entered in error

Once created, the record is also reflected under the *Exemptions* related list **Exemption Detail Record Count** column.

08 Exemptions

Ontario





Further Context

- Exemptions can only be created, edited or viewed by users with the ‘PHU Exemptions’ permission set.
- Users cannot delete exemption records.
- Users cannot delete any files that have been uploaded to an exemption record.
- Clients can have multiple exemption records; however, if multiple active exemptions exist for the same reason, they cannot have overlapping dates.
- One exemption record can have multiple files attached.
- The exemption appears on the client record regardless of status or end date.
- An exemption that no longer applies can be set to ‘Inactive’ status; update the **End Date** field as needed.
- The **End Date** can be in the past, but it cannot be before the **Start Date**.
- When the **End Date** has passed, the record status will automatically be set to ‘Inactive’.
- The ‘Entered in Error’ status can be used if the exemption was entered by mistake.
- The ‘Duplicate/Merged Obsolete’ status can be used when merging duplicate records that each have exemption records.
- The **Created By** field indicates the date/time/user that created the exemption record.
- The **Last Modified By** field indicates the date/time/user that last updated the exemption record.