

Creating Tasks for Inter-AO Communication

Send and receive communications for users between different authorized organizations (AOs) within COVaxON

Profiles

Vaccinators, PCP Vaccinators, Clinic Coordinators, Site Super Users

Core Tasks

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

#	Section	Description
1.	Overview of Task Functionality	Description of the task communication method between COVaxON users
2.	How to Send a Task Communication in COVaxON for Dose Administration Record Updates	Send a request to another user in COVaxON to update a client's dose administration record
3.	How to Receive a Task Communication in COVaxON for Dose Administration Record Updates	Receiving and completing another user's request in COVaxON to update a client's dose administration record

Additional Information

- Refer to the MOH SharePoint site for access to all COVaxON job aids and overview of all functionalities available.

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.

1. Overview of Task Functionality

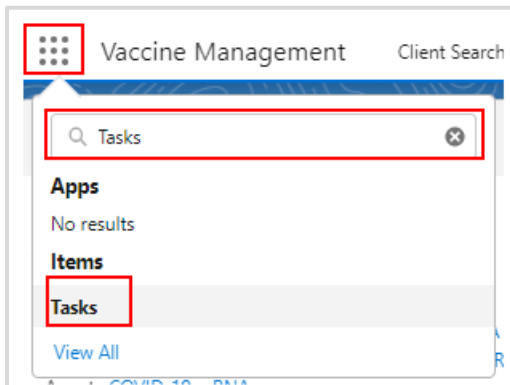
A new method of user communication within the COVaxON system has been introduced. This will allow users from different authorized organizations (AOs) to send and receive communications between each other within COVaxON.

For example, if a dose was administered to a client at the wrong vaccination event (VE), and a user notices this error, they can use the **Task** functionality to send a communication to a user at the AO of the incorrectly tagged VE. Once received, the user at the AO of the incorrect VE can reconcile the error on the client's dose administration (DA) record.

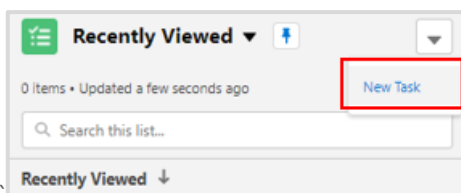
For example, if Mary's DA was incorrectly recorded at the 'Applewood Estates Retirement Home' VE, and a user from the correct VE ('Orange Grove Estates Retirement Home') notices this, they can send a communication to the user at the AO of 'Applewood Estates Retirement Home' VE. Once the communication is received, the user can use the details outlined in the task to edit Mary's DA record to ensure it is correctly tagged to the 'Orange Grove Estates Retirement Home' VE.

2. How to Send a Task Communication for DA Record Updates

1. From COVaxON, select the **9 dots** at the top left of the screen.
2. Type 'Tasks' into the **search bar**.
3. Select **Tasks** to open the **Tasks** window.



4. From the new window, users can view any tasks (sent or received). To create a new task, select the dropdown arrow on the left of the screen and click **New Task**.



5. Populate the **New Task** window:

New Task

Task Information

Subject

Assigned To [Show more >](#) **Due Date**

1 Total Task

Name **Related To**

Comments

- **Subject** – enter a descriptor of the task (e.g., Mark client [Client ID (SAFE)] DA record as ‘Entered in Error’
 - The **Client ID (SAFE)** field can be found on each client record, in the *System Information* section
- **Assigned To** – search for the user who is meant to receive this task communication. The user who is assigned to a task will receive an email notification when a task is sent.
 - To determine the user that entered information on the client’s DA record initially, view the **Created By** field at the bottom of the DA record
 - To determine the user’s AO, select their **name hyperlink** to open their user details page. From there you can view what AO they are tagged to.

- **Due Date** – (optional) indicate when the task should be completed by
- **Name** – leave blank to protect personal health information (PHI)
- **Related To** – use the dropdown arrow to select the relevant record type in COVaxON (e.g., dose administration), and then use the search bar to indicate the record number
- **Comments** – provide a description of the change that is required and why it is required (e.g., client’s DA record status must be changed to ‘Entered in Error’ as the client did not receive the dose at this VE)
- **Priority** – select a priority from the dropdown
- **Status** – indicate the status of the task from the dropdown; when creating a new task, the status should be set to ‘Open’
- **Reminder Set** – check the checkbox if you would like to set a reminder for the user
- **Date/Time** – indicate the date/time of the reminder to be sent to the user
- **Create Recurring Series of Tasks** – check the checkbox if you would like to have a recurring task; once selected, additional details will appear, and users can fill in the parameters of the recurrence

6. Click **Save** and the task communication will be sent to the user it was assigned to.

Additional Information

* Priority: High

* Status: Open

Other Information

Reminder Set:

Reminder date: On occurrence date

Time: 10:00 AM

Create Recurring Series of Tasks:

Frequency: Daily | Weekly | Monthly | Yearly

Repeat: Every Day

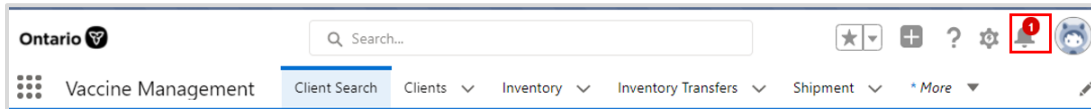
Start Date: Aug 12, 2021

End Date: Aug 13, 2021

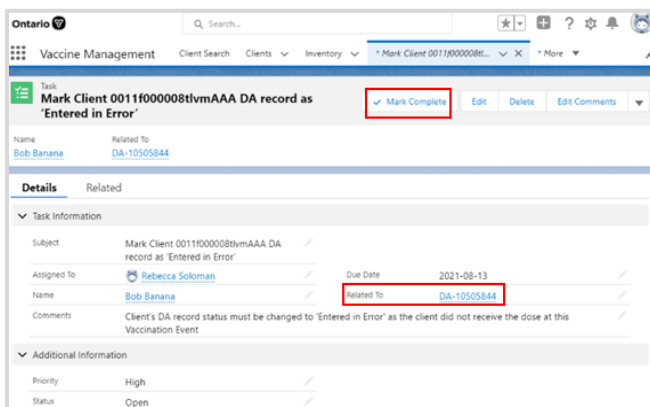
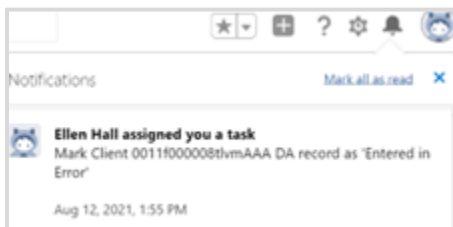
Buttons: Save & New, Cancel, Save

3. How to Receive a Task Communication for DA Record Updates

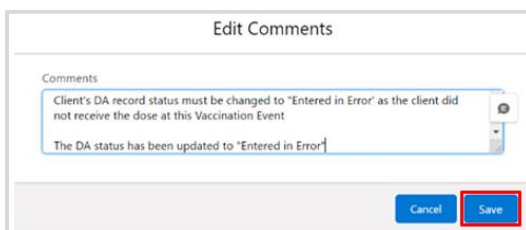
1. When a task has been received, the **notification bell** at the top right corner of COVaxON will appear with a red circle beside it.
2. Click on the **notification bell** to view the outstanding task.



3. Select the relevant task and review the request.
4. Fulfil the task requirements:
 - **If the task is related to a specific DA record** – from the task record, click the **Related To** hyperlink to open the DA record. Edit the DA record, as needed. Click **Save**.

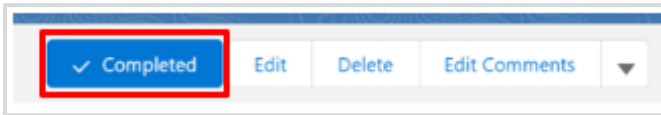


5. Once the task is complete, return to the task record.
6. Click **Mark Complete** on the top right side of the task record to indicate that the task has been completed. The **Mark Complete** button will be updated to **Completed**.
7. Comments can be optionally added to the task record. Select **Edit Comments**, add any additional comments, and click **Save**.

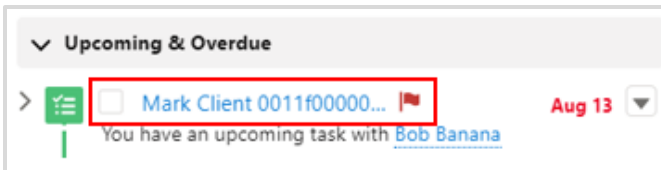


Further Context

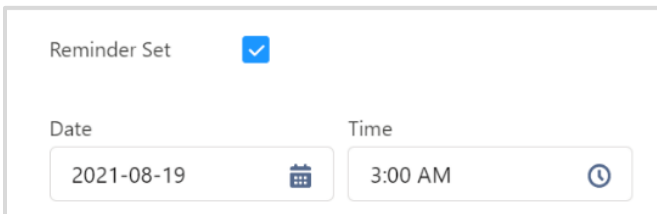
- To reopen a task, hover over the **Completed** button on the top right of the task record and click **Reopen**. The button will update to **Mark Complete**. When complete, the task can be closed again.



- Tasks that are tagged to a specific DA record can be found within the DA record itself. Within the DA record, tasks are listed on the right side within the section *Upcoming & Overdue*. Click on the **hyperlink** in the task name to view the task record.



- Task reminders can be setup when creating a task record, or by editing an existing task record. From the task record, populate the **Reminder Set** checkbox and enter the **Date** and **Time** that you would like to send the next task reminder.



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.