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 $\mbox{COVax}_{\mbox{ON}}$ users
2.	How to Send a Task Communication in COVax _{ON} for Dose Administration Record Updates	Send a request to another user in $\mbox{COVax}_{\mbox{ON}}$ 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 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. Overview of Task Functionality

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

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 COVax_{ON}, 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.

Vaccine Management	Client Search
Q. Tasks	8
Apps	
No results	
Items	
Tasks	
View All	R

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**.

📁 Recently Viewed 🔻 👎	-
0 items • Updated a few seconds ago	New Task
Q. Search this list	
Recently Viewed \downarrow	

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

New Task							
k Information							
* Subject	Mark Client 0011f000008tlvmAAA D/ Q						
Assigned To	Rebecca Soloman × Show more »	Due Date	2021-08-13	苗			
1 Total Task							
Name	Bob Banana ×	Related To	Ø DA-10505844	×			
Comments	Client's DA record status must be changed to Vaccination Event	o "Entered in Error' a	as the client did not receive the dose	e at this			

- 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.

lert est.kk.29481	Record Type Administered	Days Since Immunization 74	Status Inventory Recalled	
accine Product Inf				
Product : PFIZER-BIONTE		4E mRNA CONE mRNA - 23232, 2021/09/	10	
Agent : COVID-19 mRNA				
Basic Details	Consent & Assess	ment Vaccine & Prod	uct Details Files History	
Ciert	test_kk_29	181		
Dose Administration	DA-204487	84		
Sub-Type	Point of Ser	vice		
Days Since Immunization	74			
Country Veccine Administered	Canada			
V Dose Validation				
Verification Status				_
✓ System Details				





- 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 COVax_{ON} (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	า		
* Priority	High	•	
* Status	Open	•	
Other Information			
Reminder Set			Create Recurring Series of Tasks
Reminder date	On occurrence date	•	Frequency
Time	10:00 AM	•	Daily Weekly Monthly Yearly
			Repeat
			Every Day 👻
			Start Date End Date
			Aug 12, 2021 🗰 Aug 13, 2021 💼
			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 COVax_{ON} 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.

Notifications			Mark al	as read	×				
	lall assigned you a ta lient 0011f000008tlvm		ecord as "i	intered	in				
Aug 12	2021, 1:55 PM								
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Vaccine Ma	inagement Client Search	Clients 🗸	Inventory 🗸		ent 0011f000				
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- 5. Once the task is complete, return to the task record.
- 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 aded tot 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.

∨ Up	coming & Overdue	
> ĭ≡ 	Mark Client 0011f00000 P You have an upcoming task with Bob Banana	Aug 13 💌

• 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.

Reminder Set	~		
Date		Time	
2021-08-19	Ħ	3:00 AM	0

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

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