COVax_ON Clinical Flow Modernization

Training-the-Trainer Manual

Ontario

Today's Agenda

1	Overview of Clinical Flow Modernization (**20 min**)
2	Demonstration of Functionality Changes (**20 min**)
3	Resources and Support (**5 min**)
4	Next Steps (**5 min**)
5	Q&A (**10 min**)

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Housekeeping

STAY ON MUTE

Please ensure your microphone is muted during this presentation.

QUESTIONS

Please use the chat function for any questions.

SUPPORT MATERIALS

This presentation will be shared with you after the session.

Training package is available on SharePoint for site leads and trainers.

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Today's Presenters

Gyty
Noori

LaKeshia
Johnson

Nicholas
Fortura

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Session Objectives

By the end of today's session, you should be able to:
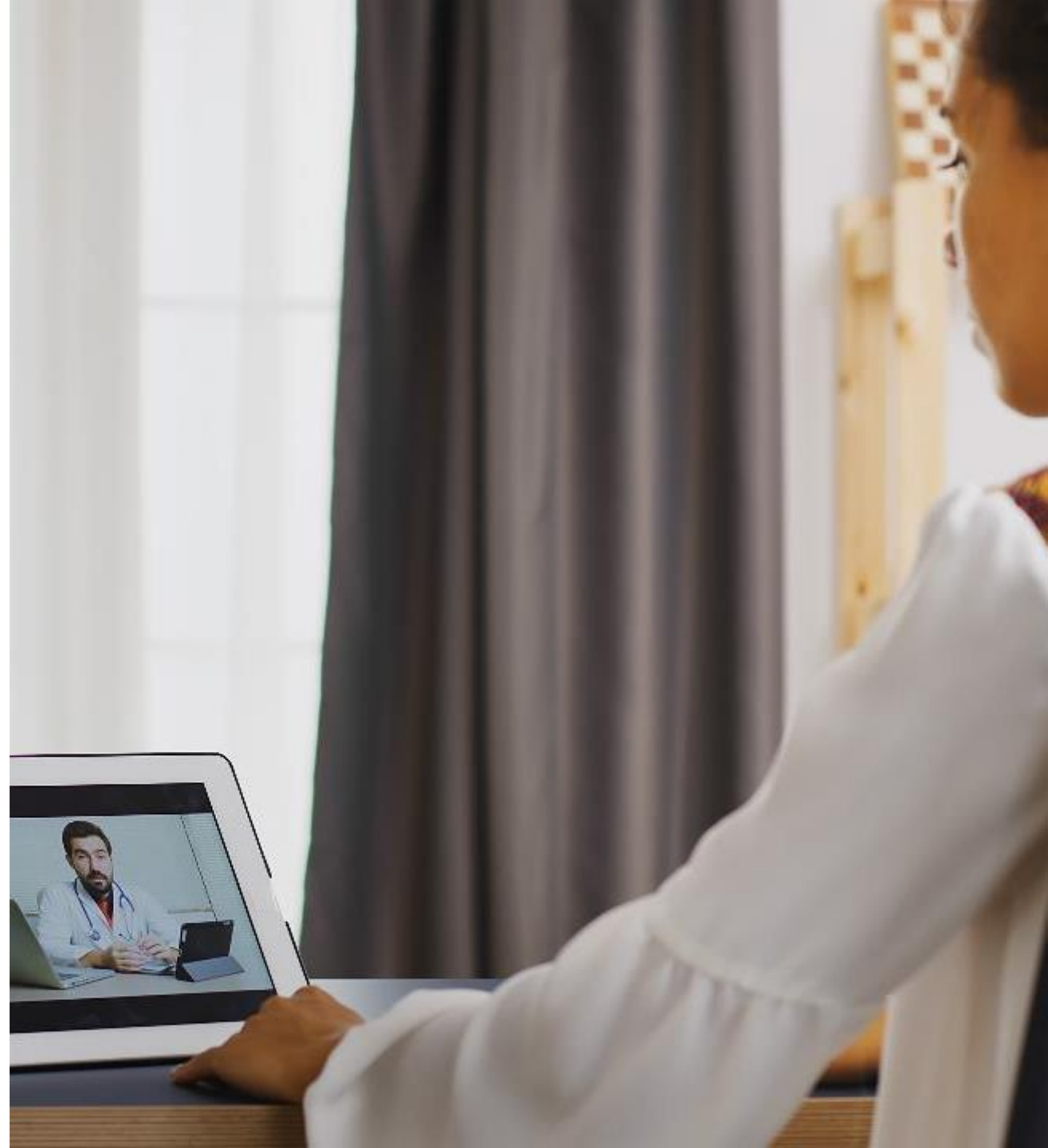
1. Understand the changes to COVax$_{ON}$

2. Recall the updated dose administration functions

3. Access all necessary training and support materials to conduct training sessions

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Your Role

- Enable user proficiency with the updates to the system

- Maximize post go-live user performance by providing support and tools for users at the time of need

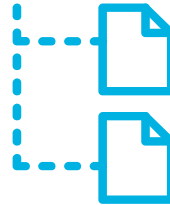# Clinical Flow Modernization:
Overview

Introducing Clinical Flow Modernization

Starting June 8, 2022, new system features will improve the usability of COVax$_{ON}$ as well as enable it to support broader provincial immunization technology objectives in the future.
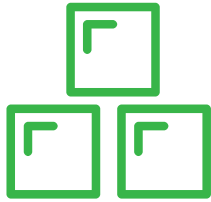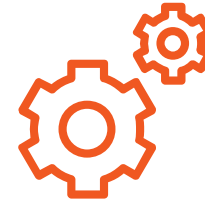

Creating a Foundation

Create a foundation for supporting other types of vaccines and external feeds/systems

Decoupling Inventory

Users can record historical doses without decrementing from provincial inventory supplies

Improving Maintenance

Improve the ability to perform system maintenance and enhancements

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Clinical Flow Modernization: Scale of Change

What is NOT changing:

Client Search	Inventory Management	User Profiles & Setup
Create New Clients	Vaccination Events	User Permission Sets
Merge Clients	Authorized Organizations	Request Profiles & Accounts
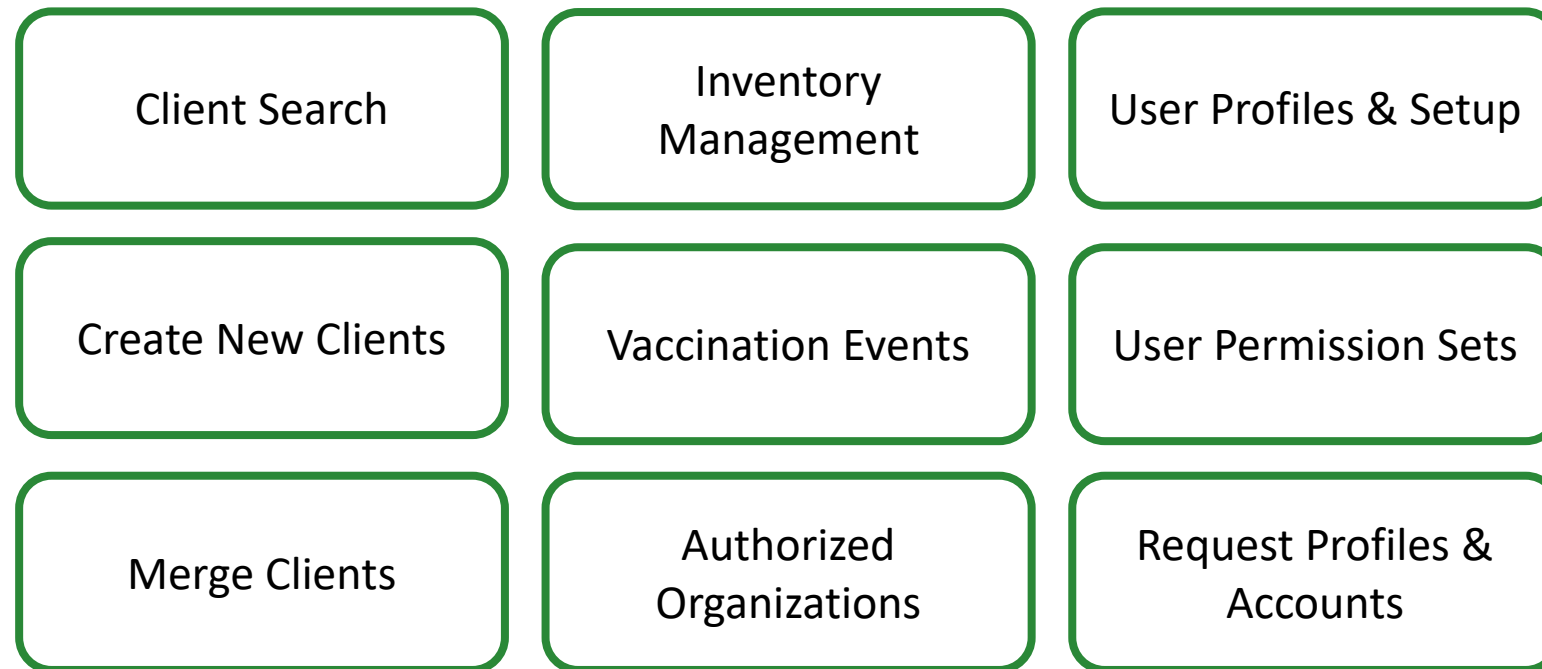
What IS changing:

FUNCTIONAL CHANGE

Administer a Dose

PROCESS CHANGE

Generate Receipt

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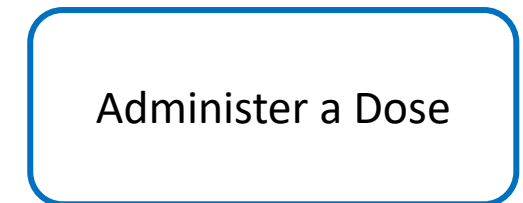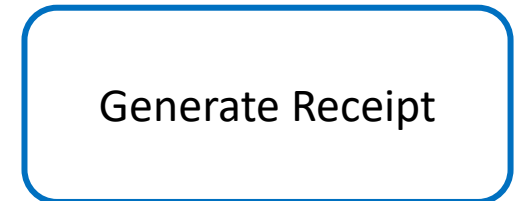
Clinical Flow Modernization Terminology
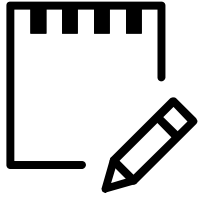
Let's clear up the meaning of some terms we will encounter:

Current State

Current functionality of COVax$_{ON}$ (prior to Release 16.0)

Future State

Future functionality of COVax$_{ON}$ (Release 16.0 onward)

Administered

The vaccinator is preparing to administer the vaccine to the client in real time

Historical

The vaccine has already been administered in the past (Out of Province or Non-ON stock). The vaccinator is not preparing to administer the vaccine to the client in real time.

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Process Flow Categories
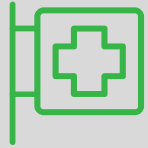
     FUTURE

SIMPLIFIED — Intended for vaccines administered by **solo clinicians**

STANDARD — Intended for **mass immunization clinics**

HISTORICAL — Intended for documenting **past** or **out of province** immunizations

MODERNIZED — Intended for **all immunization Flows**

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Process Flows | Current State

SIMPLIFIED

Intended for vaccines administered by **solo clinicians**

1. Click **Launch Simplified Flow**
2. Verify **Vaccination Event**
3. Obtain **Consent**
4. Select **Vaccine**
5. Conduct **Pre-Screening Assessment**
6. Enter **Vaccine Details** (e.g., Anatomical Site) •
7. **Review** and **Finish**

STANDARD

Intended for **mass immunization clinics**

CHECK-IN (A)

1. Begin **Check-In**
2. Verify **Vaccination Event**
3. Obtain **Consent (Data)**
4. **Review** and **Finish** (proceed to B)

VACCINATION (B)

1. Click **Administer Dose**
2. Select **Vaccine**
3. Conduct **Pre-Screening Assessment**
4. Obtain **Consent (Vaccine)**
5. Enter **Vaccine Details** (e.g., Anatomical Site) •
6. **Review** and **Finish** (proceed to C)

CHECK-OUT (C)

1. Begin **Check-Out**
2. Record **AEFI** (if applicable)
3. Print or email **Receipt**
4. **Finish**

HISTORICAL

Intended for documenting **past** or **out of province i**mmunizations

1. Select **Document Historical Dose**
2. **Out of Province Non-ON Stock**
3. **Product**
4. **Lot Number + Expiry Date**
5. Obtain **Consent (Service)**
6. Enter **Vaccine Details** (e.g., Country) •
7. **Review** and **Finish**

• Note that **Vaccine Details** differ for each flow. Refer to the appendix for more information.

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Process Flows | Future State

MODERNIZED

Intended for **all immunization Flows**

1 Click **New Immunization**

ADMINISTERED

2 Verify **Vaccination Event**

3 Select **Vaccine**

4 Conduct **Pre-Screening Assessment**

5 Record **Consent** and **Dose Information**

6 **Finish** and **Review Client Immunization Record**

HISTORICAL

2 Search **Agent, Product, Product Lot Name**

3 Locate and select **Product**

4 Record **Dose Information**

5 **Finish** and **Review Client Immunization Record**

Historical will be visible for those with the appropriate permission sets (i.e., PHUs and select organizations)

If Vaccine is <u>not</u> found, enter the:
- **Product Name**
- **Agent***
- **Lot Number**
- **Expiry Date**

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Record a Vaccination | Administered

Once a client profile is complete, the Vaccine Administrator can proceed to record the vaccination in COVax$_{ON}$.

1 From the client record, click **New Immunization** ┌ New Button! ┐

2 Select '**Administered'** to record the vaccination taking place in real time ┌ New Screen! ┐

3 Verify the **Vaccine Event** associated with the client

4 Select the **Vaccine** from the dropdown menu

5 Complete the **Pre-Screening Assessment**

6 Record **Consent** and **Dose Information**

7 Once complete the immunization record's status will change to '**Administered'**
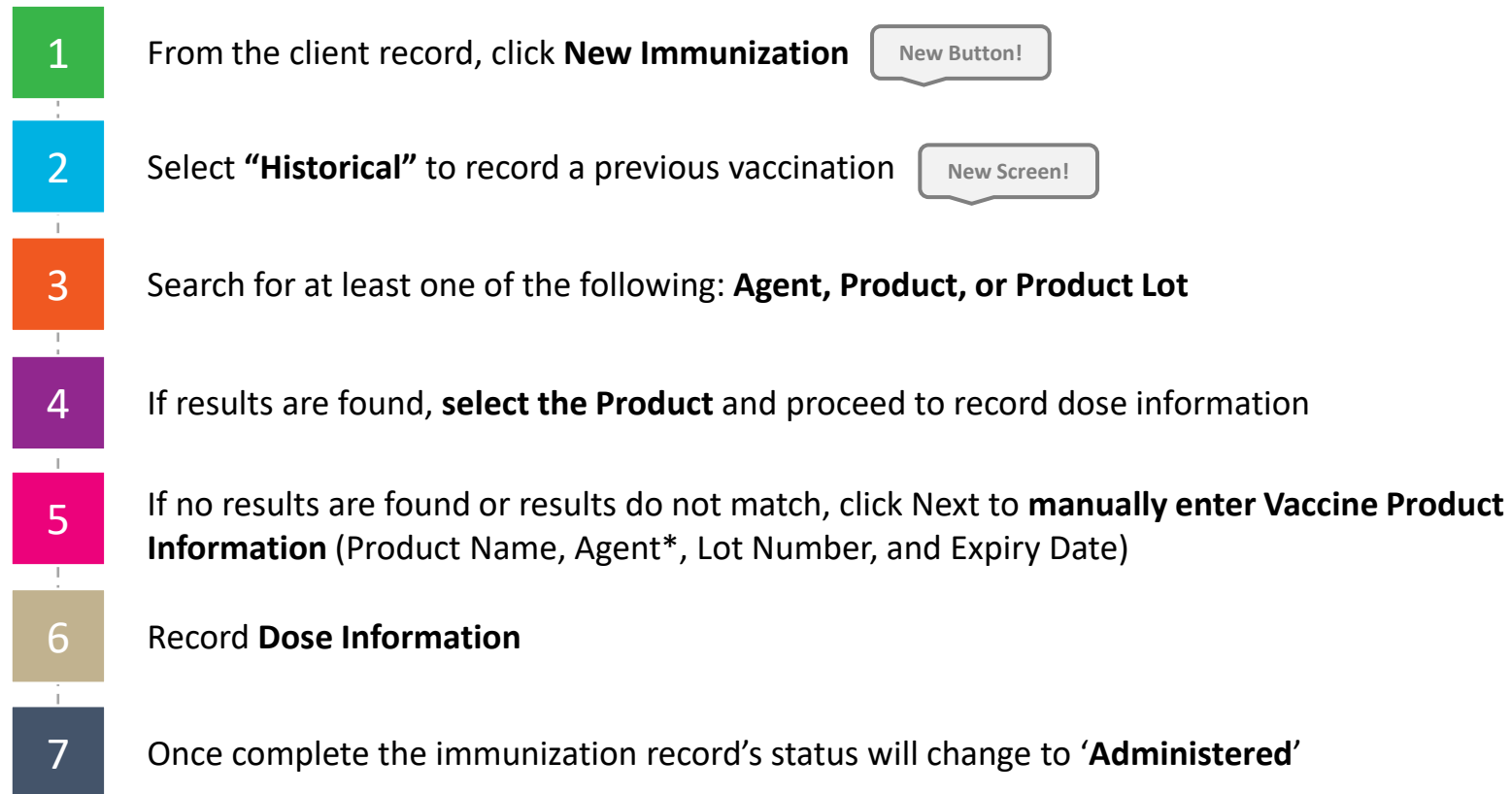
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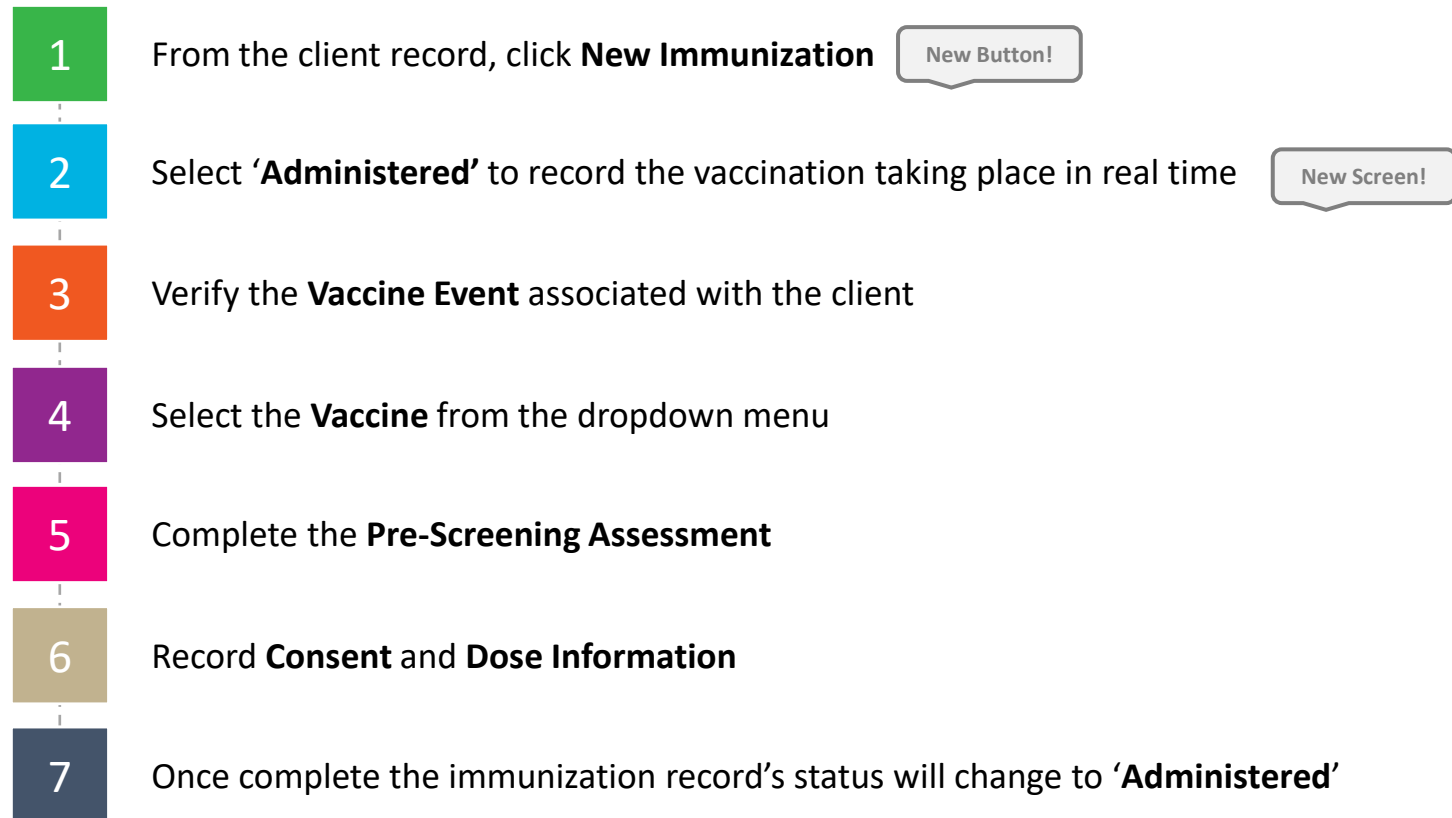
Record a Vaccination | Historical

Once a client profile is complete, the Vaccine Administrator can proceed to record the vaccination in COVax$_{ON}$.

1 From the client record, click **New Immunization** `New Button!`

2 Select **"Historical"** to record a previous vaccination `New Screen!`

3 Search for at least one of the following: **Agent, Product, or Product Lot**

4 If results are found, **select the Product** and proceed to record dose information

5 If no results are found or results do not match, click Next to **manually enter Vaccine Product Information** (Product Name, Agent*, Lot Number, and Expiry Date)

6 Record **Dose Information**

7 Once complete the immunization record's status will change to '**Administered**'

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System Demo:
Administered

Resources and Support

Providing User Support

There are a few things your site may choose to do to provide user support:

1. Organize role-specific training sessions for target audiences

2. Provide training to Pharmacy IT to enable the to provider Tier 0 support

3. Train additional trainers

4. Identify Super Users

5. Hold office hours

6. Tailor job aids for specific roles (but remember they need to be kept up to date with new functionality)

7. Compile and share FAQs

Ministry of Health SharePoint Site

This site is a document repository for all available training materials. Please ensure you are regularly checking the ministry's SharePoint site for any document updates.

How to gain access to the SharePoint site:

- **For Trainers:** SharePoint access will be requested for Trainers when they sign up for the Train the Trainer session.

- **For Site Leads:** All other users that want access should send an email to COVaxonSupport@ontario.ca requesting to be granted access.

Once SharePoint access is granted:

- Users can access the SharePoint site by using their browser.

- Trainers and Site Leads should download required content and put it in an accessible shared location for your team to access.

- There is a pharmacy-specific folder in SharePoint that contains all the training materials pharmacies will require. Specific folders can be found here

TIP

Remember to keep your content up to date with the latest content released!
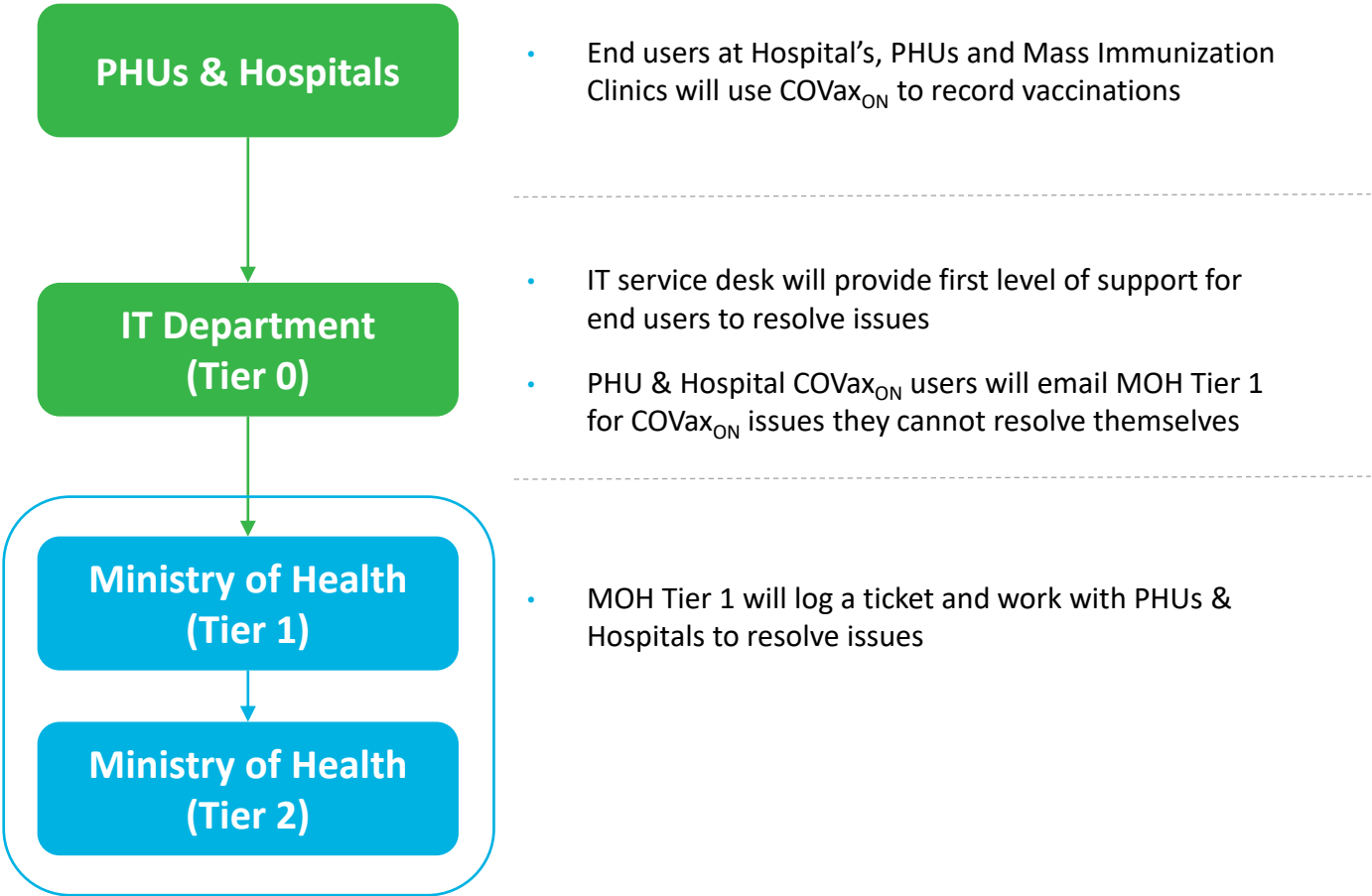
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Job Aids and Training Materials

Job Aids

Name	Description	Intended Audience
Inventory Management	Creating shipment and inventory records, transfers, wastage, excursions, recalls	Inventory Managers
Creating Vaccine Events	Creation, setup, and monitoring of vaccination events	All Users
Client Immunization – Administered	Selecting vaccine inventory and recording administered doses for clients	Vaccine Administrators
Client Immunization – Historical	Recording previously administered doses for clients	Vaccine Administrators
Search, Create & Maintain Client	Client creation, finding client profiles, updating client information	All Users
User Profile Setup	Two-factor authentication, login/logout process, user access details	All Users

Train-the-Trainer

Name	Description	Intended Audience
Train-the-Trainer Manual	PowerPoint train-the-trainers deck will be posted on the SharePoint site	All Users

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Support Model – PHU & Hospitals

PHUs & Hospitals

- End users at Hospital's, PHUs and Mass Immunization Clinics will use COVax_ON to record vaccinations

IT Department (Tier 0)

- IT service desk will provide first level of support for end users to resolve issues
- PHU & Hospital COVax_ON users will email MOH Tier 1 for COVax_ON issues they cannot resolve themselves

Ministry of Health (Tier 1)

Ministry of Health (Tier 2)

- MOH Tier 1 will log a ticket and work with PHUs & Hospitals to resolve issues
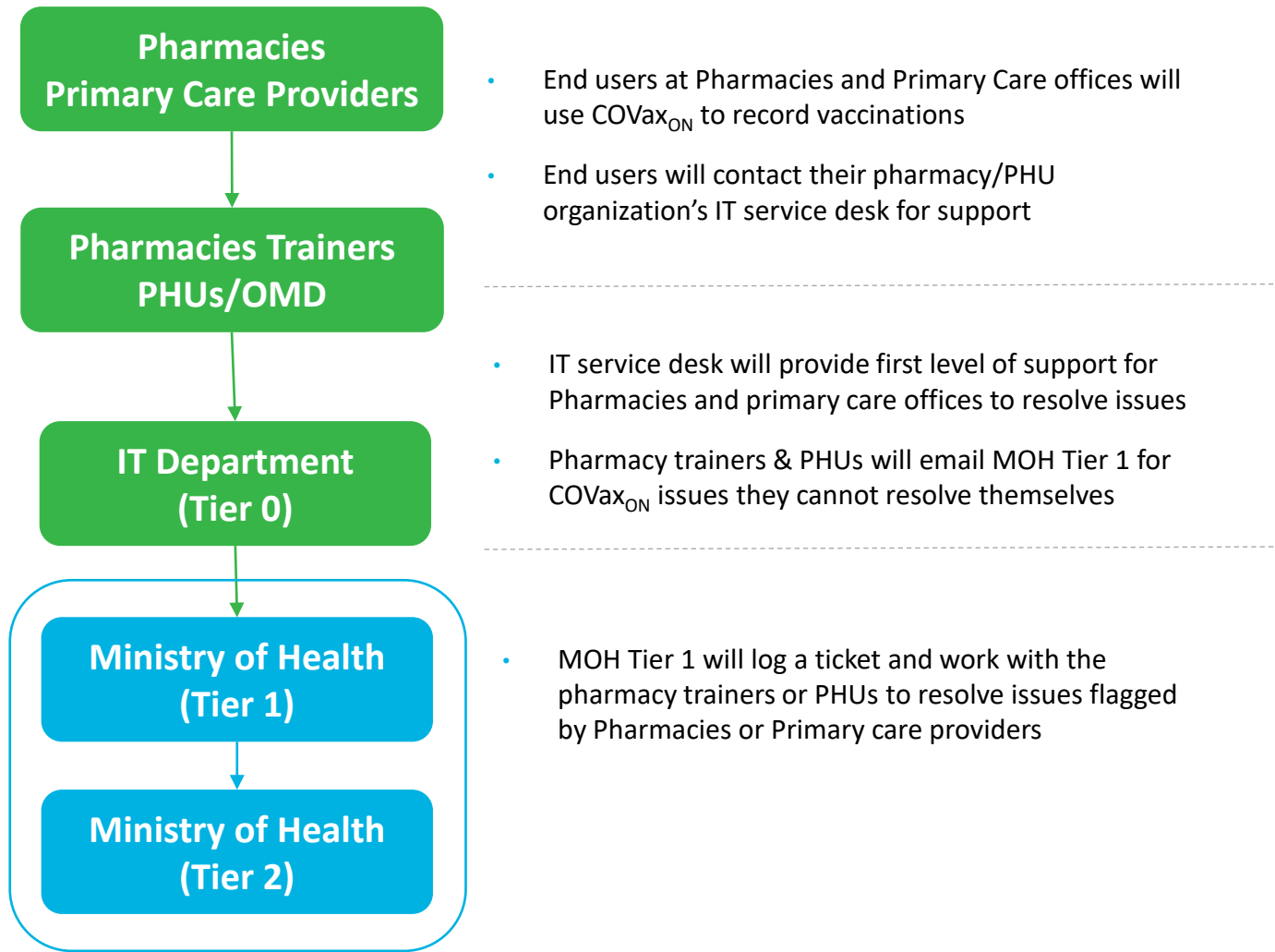
Support to IT

Help Desk

- For assistance with access, passwords
- Report issues and defects

Phone: 416-327-3512

Toll Free: 1-866-272-2794

Email: COVaxonsupport@ontario.ca

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Support Model – Pharmacies and Primary Care Providers

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┌─────────────────────────┐
│      Pharmacies         │
│  Primary Care Providers │
└───────────┬─────────────┘
            ↓
┌─────────────────────────┐
│   Pharmacies Trainers   │
│        PHUs/OMD         │
└───────────┬─────────────┘
            ↓
┌─────────────────────────┐
│     IT Department        │
│        (Tier 0)         │
└───────────┬─────────────┘
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┌─────────────────────────┐
│   Ministry of Health     │
│        (Tier 1)         │
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┌─────────────────────────┐
│   Ministry of Health     │
│        (Tier 2)         │
└─────────────────────────┘
```

- End users at Pharmacies and Primary Care offices will use COVax$_{ON}$ to record vaccinations

- End users will contact their pharmacy/PHU organization's IT service desk for support

- IT service desk will provide first level of support for Pharmacies and primary care offices to resolve issues

- Pharmacy trainers & PHUs will email MOH Tier 1 for COVax$_{ON}$ issues they cannot resolve themselves

- MOH Tier 1 will log a ticket and work with the pharmacy trainers or PHUs to resolve issues flagged by Pharmacies or Primary care providers

Support to IT

Help Desk

- For assistance with access, passwords
- Report issues and defects

Phone: 416-327-3512

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Next Steps

What's Next for Trainers

Prepare for end user training by completing the following:

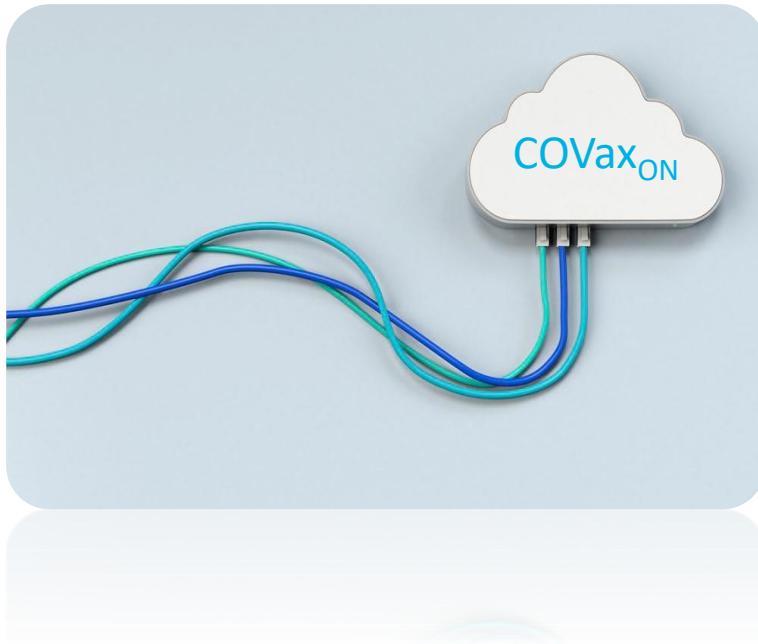|	
1	Organize training sessions for users on the new functionality
2	Review the entire training package to ensure you are completely comfortable with the changes and are prepared to deliver them to users
3	Create test clients and setup the training environment in advance of your demonstration

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Q&A

Appendix

About COVax$_{ON}$

- Ontario has a secure cloud-based provincial solution called COVax$_{ON}$ supporting COVID-19 vaccine clinics and administration sites.

- COVax$_{ON}$ provides standard processes, workflows, and a common set of digital tools to ensure standardized timely high-quality data for the provincial response.
    - For example: scheduling, client management, recording administered doses, inventory management, receipt of vaccination, operational reporting

- The system is available real-time anywhere, anytime as long as the user has an authorized account, IT device, browser and internet connectivity.

- COVax$_{ON}$ has been quickly rolled out to vaccination partners across the province, including hospitals, ORNGE, public health units (PHUs) holding mass immunizations clinics, and long-term care homes/retirement homes (LTCHs/RHs).

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System Roles and User Groups
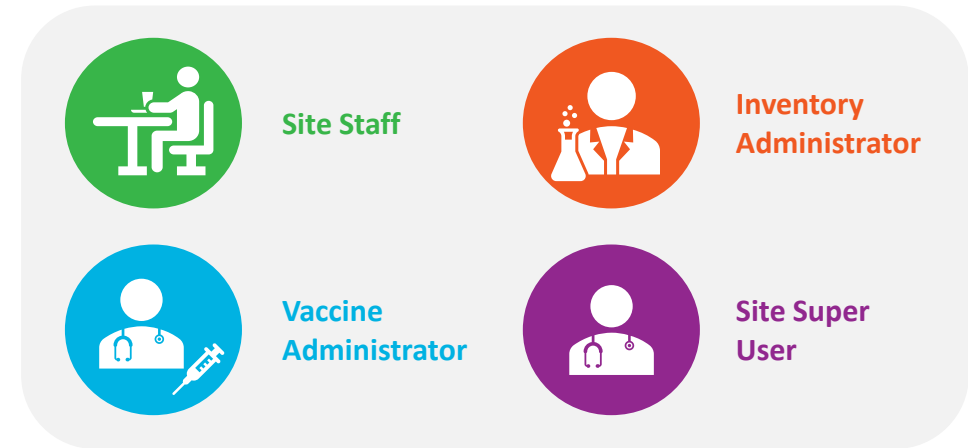
Organizations & Locations
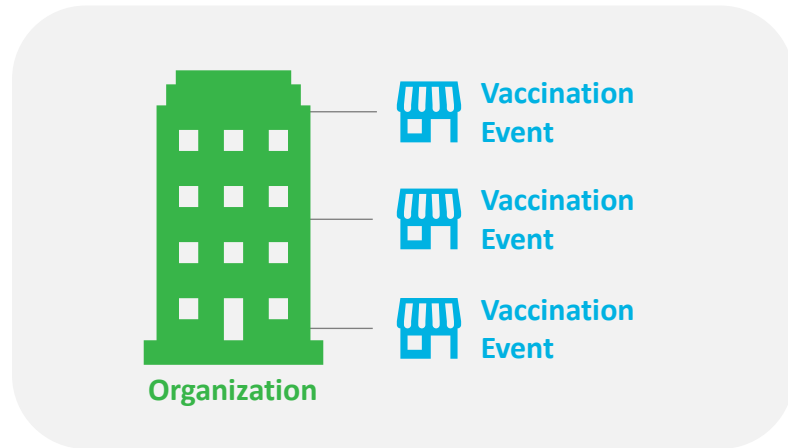
Authorized Organization

- Receive vaccine inventory from the distributor
- Log shipments and inventory into COVax$_{ON}$
- Allocate inventory to Vaccination Events

Vaccination Event

- Location where vaccinations are administered

System Users

COVax Site Staff: perform client search, check-in and check-out functions

COVax Vaccinator: perform full clinical flow (client search, check-in, dose administration, check-out)
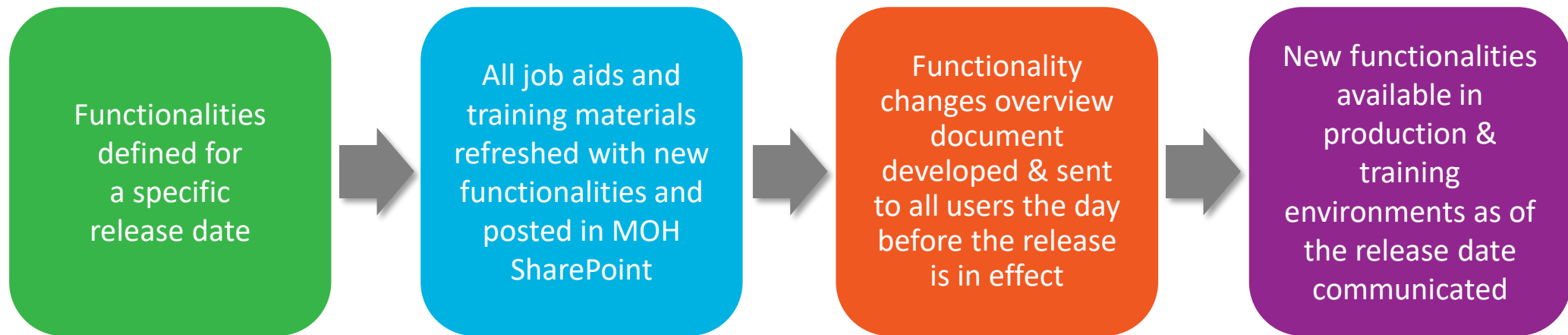
COVax Inventory Manager: create, administer and reconcile inventory

COVax Site Super User: Inventory Manager functionalities, Vaccinator functionalities, mass client upload, ability to launch simplified flow

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New Functionality

During set periods of time, known as functionality releases, the team enhances existing functionalities and creates new functionalities within the COVax$_{ON}$ solution.

The incorporation of these changes follows the below process:

| Functionalities defined for a specific release date | → | All job aids and training materials refreshed with new functionalities and posted in MOH SharePoint | → | Functionality changes overview document developed & sent to all users the day before the release is in effect | → | New functionalities available in production & training environments as of the release date communicated |

This communication can be used by the trainers, so they are aware of the functionality changes and are prepared to deliver any follow up sessions required with end users.

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Checklist

Checklist | Pre-Training

Refer to this checklist **2-3 days prior** to your scheduled training session

- ❑ Check that environment & data are available for demo sessions
- ❑ Test environment & data
- ❑ Ensure all material is prepared and ready to present
- ❑ If recording a session, ensure recording software is available and functional
- ❑ Determine person responsible for the following (refer to schedules):
    - ❑ Record/Present & Lead Session
    - ❑ Notes/Questions
    - ❑ Attendance
- ❑ Establish a back-up trainer & confirm their responsibilities
- ❑ Confirm person responsible for above tasks is available

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Checklist | During Training

Refer to this checklist **on the day of** your scheduled training session

❑ Mark attendance

❑ Mute all participants

❑ Inform all attendees that the session will be recorded, allowing them time to drop off if they are not comfortable being recording

❑ Begin recording session

❑ Address questions from chat during the Q&A

❑ Document questions in a separate file, mark the questions that require follow-ups

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Checklist | During Training

Refer to this checklist **right after** your scheduled training session

- ❑ Convert and download the session recording

- ❑ Paste recording and relevant material (in PDF format) into the SharePoint site

- ❑ Inform attendees that material is uploaded and available to view

- ❑ Reach out to MOH contact for assistance in answering open questions [Point of Contact: Carmen Cheung at Carmen.Cheung@ontario.ca]

- ❑ Respond to open questions and share with the audience

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