

Search, Create and Maintain Client Information

Record client information on the client record in COVaxON.

Profiles

Site Staff, Vaccinator, PCP Vaccinator

Core Tasks

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

#	Section	Description
1.	Locate Client Record in COVaxON	When client arrives, search for their record in COVaxON by using either the Client Search or Vaccination Events tabs or Global Search.
2.	Create New Client Record in COVaxON	If the client was not found in COVaxON, create a new client record. Gather Client Information: Ensure all mandatory fields are populated and add any additional information to the client record. Gather Sociodemographic Information: If consented, gather client sociodemographic information.
3.	Maintain Client Record	Request data collection use and disclosure and communication consent Update Client Information Update Sociodemographic Information Alerts Clinical Notes Associate Client to a Vaccination Event (Individual Client, Bulk Client Upload) Mark Client as Inactive
4.	Merge Duplicate Client Records	Merge duplicate client records found in the system
5.	Reconcile Partial Address Information on the Client Record	Compare and reconcile client information listed in COVaxON and the provincial registry.
6.	Appendix A: Offline Document Process	Description of offline document process that can be used when COVaxON is inaccessible, or a client does not consent to data collection.
7.	Appendix B: Client Record Best Practices	Description of the mandatory and highly encouraged fields on the client record.
8.	Appendix C: Extra Dose Documentation	Process for documentation of extra doses, which includes any dose of a COVID-19 vaccine that is administered in addition to the two previous COVID-19 vaccine doses that a client has received.

#	Section	Description
9.	Appendix D: Verifying Appointment Confirmation	For clients who have scheduled their appointments using the provincial Vaccination Appointment Booking (VAB) system, verify that they have successfully booked their appointment in COVaxON.

Additional Information

- Refer to the **00 – Introduction to COVaxON and User Setup** job aid to learn more about your system access.
- Refer to the **Information Package** on SharePoint for forms and process information that you might need in addition to this job aid.

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. Locate Client Record in COVaxON

Description: When the client arrives at the clinic, follow the steps below to locate the client record through the **Client Search** tab (Method A) or the **Vaccination Events** tab (Method B).

Method A: Search for the client record using the **Client Search** tab

Method A: Scenario 1 – Client has a health card number (HCN) or Covid ID value which starts with zero

Description: Client provides you with an HCN or the Covid ID use the following steps:

1. Click on the **Client Search** tab.
2. Manually enter the client's **Health Card Number** (HCN) or the Covid ID value which starts with zero, if your location is using barcode scanners, utilize it to scan the client's HCN (must be a 10-digit number with no spaces/dashes).

3. Click the **Search Client** button to complete the search.
4. If results are produced, click the desired client's name and their record will open in a new tab.

5. If results are not produced, a screen will appear to enter other client identifiers. The search must include the client's last name. In addition, it is recommended to include the client's first name, birthdate and/or postal code to narrow the search. All available search parameters include:

- **First Name**
- **Last Name*** – (required)
- **Birthdate** – only present or past dates can be entered
- **Gender**
- **Phone** – Home, Mobile, Other; recommended to have no dashes or spaces in the middle
- **Postal Code** – recommended to be in the format A1A 1A1, with no dashes or a space in the middle
- **Alternative ID** – select an Alternative ID type from the dropdown; select 'Other' if the type of identification presented is not available from the dropdown list
- **Other Alternative ID** – this is a free text field which should be populated if 'Other' is selected for the **Alternative ID** field
- **Alternative Id #** – enter if an Alternative ID is entered
- **Vaccination Event Name** – free text field; must be an exact match

Note: Search parameters must be an exact match – fuzzy matches will not return results. A fuzzy match means that the name is similar, but not exact. For example, short forms of names such as *Matt* instead of *Matthew*.

6. Click **Next**.
7. If results are produced, click the desired client's name to open their record.

- 8. If no results are produced, you will be directed to an option to search the Provincial Registry. This is an integration between COVaxON and the Provincial Registry (which contains client information who are registered under OHIP). Click **Next** to continue.

Click Next to proceed with Provincial Registry search for Health Card Number: 1010354520

Previous Next

- 9. If there is no exact match for the client’s HCN found in the Provincial Registry, a popup message will display saying ‘**No Records Found**’. You may click the **Previous** button and modify the HCN if there was a mistake or click **Finish** and proceed to [Section 2](#) below.

No Records Found

No client record found in the Provincial Registry. Close window to create a new client.

Previous Finish

- 10. If an exact match is found, a record will appear with the details from the Provincial Registry. Review the client details and validate the information to ensure it is the correct client (for example, validate their birthdate). Click **Next**.
- 11. If you would like to proceed with client creation, click **Next** and proceed to [Section 2](#) below. If you do not wish to proceed with the client creation, click the **X** on the top right corner of the screen to cancel.

Click **Next** to create the client or **X** to cancel.

Previous Next

- 12. If a client record exists in COVaxON but does not include an HCN, and the HCN is searched within the Provincial Registry, if a duplicate is found, users will receive a warning message to confirm whether they would like to continue with the client creation.

Potential multiple duplicate record(s) are found for: BG XZ

Use **Global Search** to enter the client's name and view the potential duplicate record(s), or click **Next** to create a new record for:

First Name: BG
Last Name: XZ
HCN: 4000007494

Previous Next

Once created, the client records will be flagged as duplicates in the system and can be merged if required. If they are unique records, users should ensure they are mindful of using the correct record and continue without merging.

Method A: Scenario 2 – If the client does not have a health card or Covid ID

Description: If the client does not exist after searching their HCN, or they do not have an HCN, use the following steps:

1. Click on the **Client Search** tab.
2. Click on the **HCN unavailable** checkbox and click **Search Client**.

Enter the Health Card Number (HCN). If Health Card Number is unavailable, click 'Search Client' to search using other parameters.

Health Card Number

HCN unavailable

Search Client **Create New Client** **Clear**

3. A screen will appear to enter other client identifiers. The search must include the client's last name as well as any other search parameters. See Step 5 in Scenario 1 above for details.
4. If results are produced, click the desired client's name and their record will open in a new tab.
5. If results are not produced, a popup message will display saying '**Close window to create a new client**'. You may click the **Previous** button and modify the client identifiers if there was a mistake, or click **Finish** and proceed to [Section 2](#) below.

No Records Found

Close window to create a new client.

Previous **Finish**

Method B: Search for the client record using the Vaccination Events tab

1. Navigate to the **Vaccination Events** tab and select the appropriate VE.

Vaccine Management Client Search Clients Dashboards Vaccination Events Product Lists

Vaccination Event **Abby VE** New Immunization

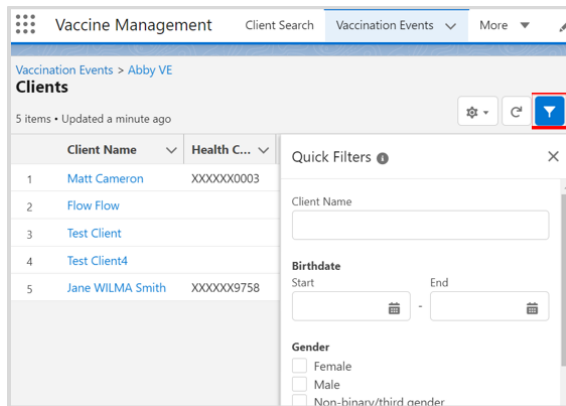
Vaccination Event Type
Mass Immunization Clinic

Related Details

Clients (6+)

Client Name	Health Card Number / COVID ID	Birthdate	Age
Chris Morris	XXXXXXXXXX510	2006-08-16	15 Years 6 Month(s)
Matt Cameron	XXXXXXXXXX003	1964-11-23	57 Years 3 Month(s)

2. Click on the **Related** tab and scroll down to see a list of clients tagged to the VE.
3. Scroll down and click **View All** to see the list.
4. From the client list, select the **Filter** icon.



5. If your location is utilizing barcode scanners, click the **Health Card Number / COVID ID** field and scan the client's health card barcode. The information will populate in the selected field.
6. If your location is not utilizing barcode scanners, manually enter the relevant information. For example:
 - Enter client HCN or COVID ID (recommended parameter to use)
 - Enter client name (if they do not have an HCN)
 - Filter clients by HCN
7. Click **Apply**. If the search produces results, select the desired client's name to navigate to their client record. (**Note:** This view is limited to 2000 records, therefore it is important to leverage filters to ensure there are no missing results; for example, by status, client name).
8. Validate other identifying information on the client record to ensure it is the correct client (for example, validate their birthdate). Update any missing information, then proceed to [Section 3](#).

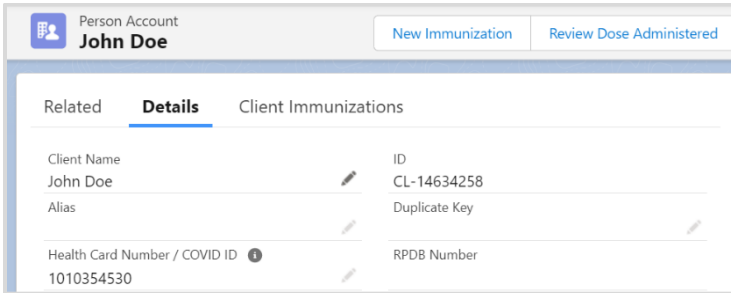
Notes:

- user can search clients whose first names and last names include apostrophes
- If there is not an exact match based on the entered search criteria and the search results found, search result output is limited to 20 number of records. If the search result exceeds 20 number of records, display message "Please refine search criteria by adding more fields". User can click 'previous' button to display "Client Search Screen" to add more fields.
- If results are not produced, try to search using the **Client Search** tab (explained above). If a search from the **Vaccination Event** and **Client Search** tabs do not produce results, proceed to [Section 2](#).
- COVaxON saves any previous filters on the **Vaccination Events** tab. The filters must be cleared before performing a new search. Click **Clear All Filters** and **Apply** before performing a new search.

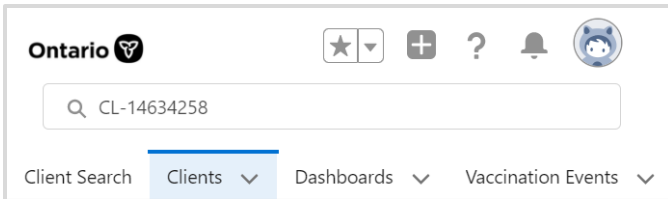
Method C: Global search for the client record using the ID unique identifier

Description: This field is a unique client identifier that is read-only and is visible to all users. Users can reference this unique ID to identify a client and search within COVaxON.

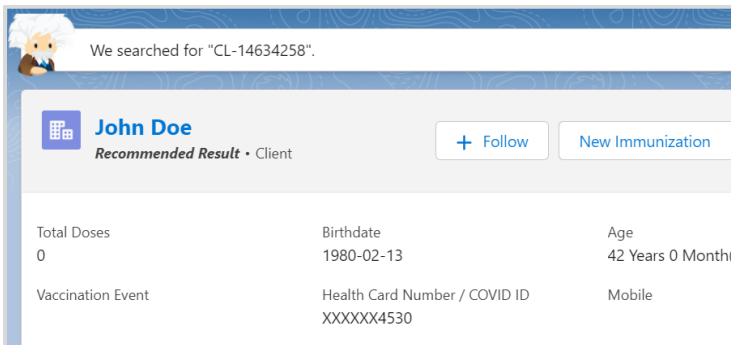
- Once a new client record is created in COVaxON a unique client identifier number is auto generated and displayed on the *Person Account* section on the client screen.



- Navigate to the **global search box** on any screen in COVaxON and enter the ID for the client. Press **Enter** to search for the client.



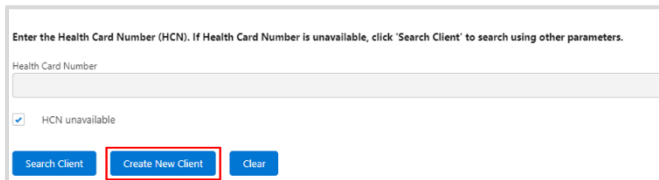
- The search result displays the client record found based on the unique ID entered.
- Click on the client's name link to view the client details.



2. Create New Client Record in COVaxON

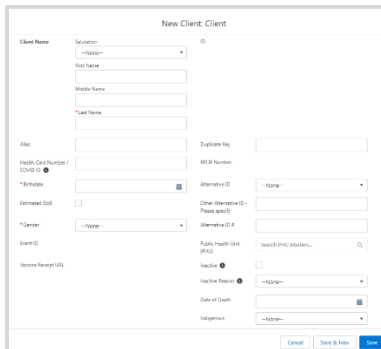
Description: After searching for the client using the above processes, and if it is determined that the client does not exist in COVaxON, their record must be created manually. Please refer to the established clinical processes for approving new clients before creating new records in COVaxON. When creating a new client record, it is important to capture as much information as possible and ensure accuracy. Refer to [Appendix B: Client Record Best Practices](#) for information about populating the client record.

- From the **Client Search** tab, click **Create New Client**.



Note: The **Create New Client** button will be unavailable until the user has attempted to search for the client using the **Search Client** button ([Section 1](#) above).

- A new client information window will open. Proceed to fill in client information. Refer to [Appendix B: Client Record Best Practices](#) for details on populating the client record.



- Click **Save**. You will be brought to the client record. Follow [Section 3](#) to continue.

Note: Duplicate client entries may be detected in the system. Refer to **Further Context** information below.

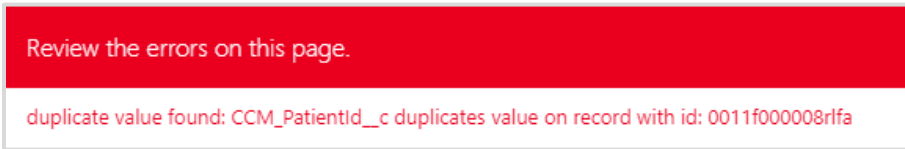
Further Context

A duplicate client will be detected in the system if:

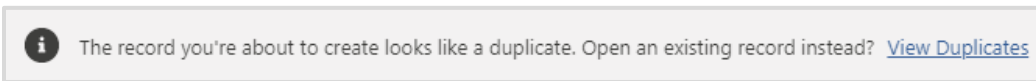
- There is an exact match on the HCN, or
- A combination of other demographic information such as a name match on 2 or more of first name (exact or approximate), and last name (exact or approximate), and **ONE OF**: date of birth (exact match), postal code (exact match), OR phone number (home, work, mobile, other – exact match). The phone number and the phone type must match (the system will *not* cross reference across different types).
- Note:** A fuzzy match means that the name is similar but not exact. For example, short forms of names such as *Matt* instead of *Matthew*. However, fuzzy matches for French names will not be detected.

If COVaxON detects that a duplicate client record is being created, one of the following messages will appear:

1. If a duplicate HCN is detected, users will receive this error and cannot proceed with client creation.



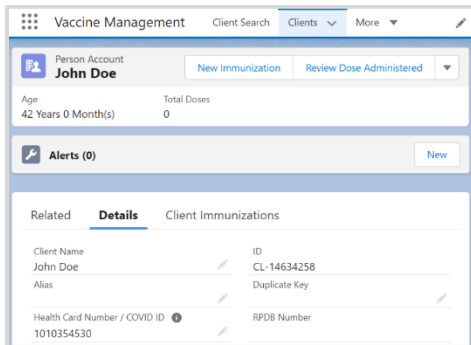
2. If duplicate demographic information is detected, users will receive this warning message, which can be bypassed if deemed appropriate. To determine if the warning should be bypassed, users can click **View Duplicates** to see if the other client records in the system for comparison. It is highly encouraged that users ensure that they are not, in fact, creating a duplicate client. If the user clicks **Open This Client**, they will be brought to the original client’s record.



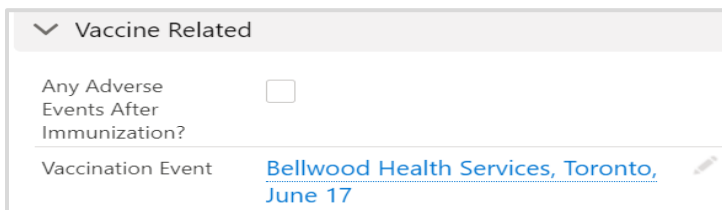
Client Information

Description: Once the client is located in the system, review/update any missing information on the client record and ensure they are tagged to the correct vaccination event (VE). Refer to the client record best practices in [Appendix B: Client Record Best Practices](#) to ensure all pertinent information is captured.

1. Using the **Pencil** icon, enter any additional information provided.



2. Ensure that the client’s **Vaccination Event (VE)** has been populated accurately. Use the **Pencil** icon to update and search for the relevant VE if needed. If the client’s VE is not accurate, the vaccinator will be unable to successfully administer the dose.



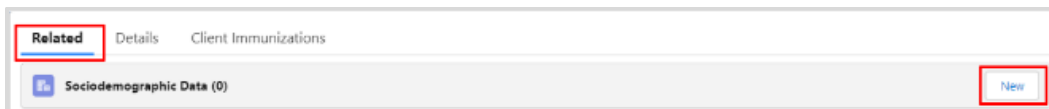
Further Context

- Upon client record creation or when updating client record details, COVaxON will automatically check/uncheck the **Follow-up Communication consent** checkboxes based on adding or removing phone number or email information when the client record was created.
- The email added to the client record can be the email of a substitute decision maker (for example, a relative or caretaker).

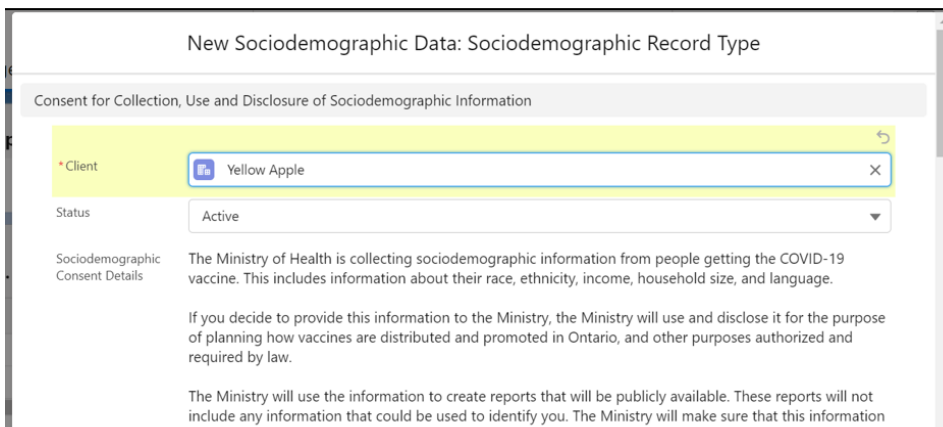
Gather Sociodemographic Information

Description: Ask the client if they consent to providing their sociodemographic information. Use the following steps to populate the data on the client record.

1. From the desired client record, click on the **Related** tab.



2. Under **Sociodemographic Data**, click **New**.
3. Read the **Sociodemographic Consent Details** to the client. If consent is obtained, click on the **Consent to collect sociodemographic data** checkbox and populate the following fields:



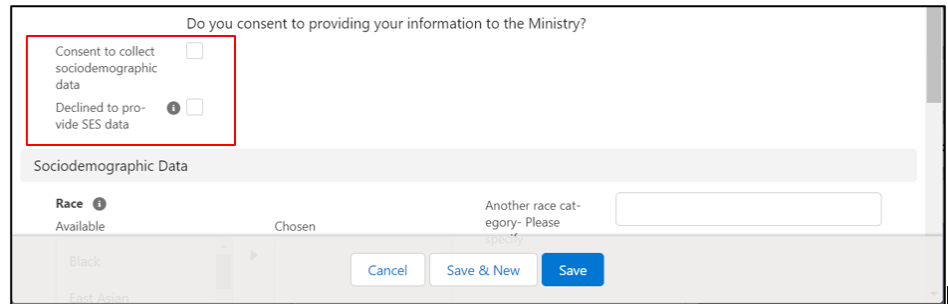
- **Client** Auto populated based on the client record selected.
- **Status** Sociodemographic (SES) status value is mandatory, when creating a new or editing an existing client record. System displays a message “Complete this field”, if “Status” field is blank when creating or updating Sociodemographic record.
From the dropdown field, select the appropriate status:
 - **Active** – (defaulted option) select this status when creating a new sociodemographic data record
 - **Duplicate/Merged-Obsolete** – a user cannot merge two duplicate client records if each client has an ‘Active’ sociodemographic record. Therefore, one of the duplicate

client’s sociodemographic record’s status must be changed to ‘Duplicate/Merged-Obsolete’ to successfully complete the client record merge.

- **Consent**

- **Entered in Error** – if a sociodemographic record was mistakenly entered, change the status to ‘Entered in Error’. Proceed to create a new sociodemographic record.

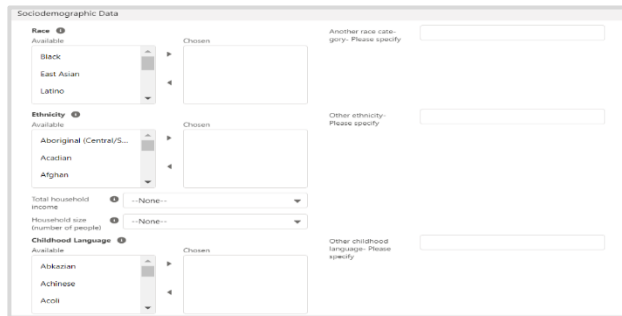
The client must provide consent for the user to record sociodemographic details about them. For a new SES record, the user must check one of the two checkboxes for SES “Declined to provide SES data” if the client was asked but declined or “Consent to collect sociodemographic data.” If the client consents.



The screenshot shows a form titled "Do you consent to providing your information to the Ministry?". It contains two checkboxes: "Consent to collect sociodemographic data" and "Declined to provide SES data". Below this is a section for "Sociodemographic Data" with a "Race" dropdown menu. The "Available" options are "Black", "East Asian", and "Latino". The "Chosen" field is empty. There is also a text input field for "Another race category- Please specify". At the bottom are "Cancel", "Save & New", and "Save" buttons.

- **Race/Ethnicity**

Select from the available options and use the right arrow to choose the option or use the free text field if needed. The left arrow can be used to move items out of the Chosen box.



The screenshot shows the "Sociodemographic Data" form with the "Race" and "Ethnicity" sections expanded. The "Race" section has "Available" options: "Black", "East Asian", and "Latino". The "Chosen" field is empty. There is a text input field for "Another race category- Please specify". The "Ethnicity" section has "Available" options: "Aboriginal (Central/S...", "Acadian", and "Afghan". The "Chosen" field is empty. There is a text input field for "Other ethnicity- Please specify".

- **Total Household Income**
- **Household Size**
- **Childhood Language**
- **Official Language**

Indicate value from dropdown.
 Indicate the number of people in the client’s household.
 Indicate the language the client first learned and still understands from the options listed or use the free text field if needed.
 Indicate which of the Canadian official languages the client is most comfortable speaking.

4. Click **Save** to save the information on the client record.
5. Users can edit the sociodemographic record by clicking the dropdown and **Edit**.

Sociodemographic Data (1)		New
Sociodemographic Data	Last Modified Date	Edit
SES-000019458	2021-06-10, 3:55 p.m.	

Further Context

- *Clients are only able to have one active sociodemographic record on their client record and once a sociodemographic record is created, it cannot be deleted.* Therefore, if a sociodemographic record needs to be replaced, update the status of the record to 'Duplicate/Merged-Obsolete' or 'Entered in Error'. Once a record is tagged to one of those 2 options, the records will be locked and no longer editable by users. The user can then create a new 'Active' sociodemographic record if required.

3. Maintain Client Record in COVaxON

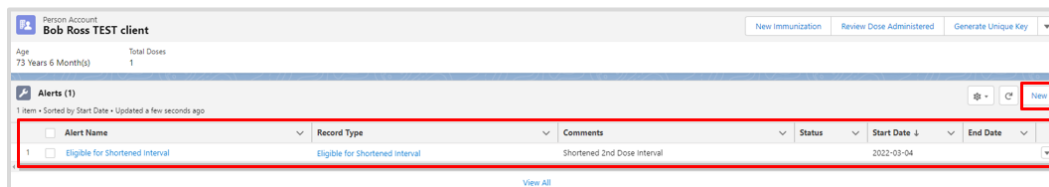
Alerts

Description: Once the client record has been located and opened in COVaxON, add or review any alerts on the record. Once reviewed,

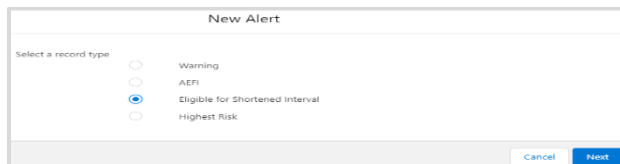
Please note: For clients who have scheduled their appointments using the provincial Vaccination Appointment Booking (VAB) system, verify that they have successfully booked their appointment before processing them into COVaxON. See [Appendix D: Verifying Appointment Confirmation](#) to verify client appointment bookings. For all other clients, proceed with the steps below.

From the client record, add any new alerts or review any existing alerts. For example, if the client is considered to be 'Eligible for Shortened Interval', site staff can review this alert to determine if the client is eligible for vaccination. To add a new alert:

1. Click **New** from the *Alerts* section.



2. Click alert type being created:



The 'New Alert' dialog box shows four radio button options: 'Warning', 'AEFI', 'Eligible for Shortened Interval', and 'Highest Risk'. The 'Eligible for Shortened Interval' option is selected. There are 'Cancel' and 'Next' buttons at the bottom right.

- **Warning** – serves as an immediate alert to all users who access the client record. E.g., client has a needle phobia and faints at the sight of needles. Ensure client is lying down.
- **AEFI** – maybe for any specific information related to an AEFI they experienced on their previous dose.

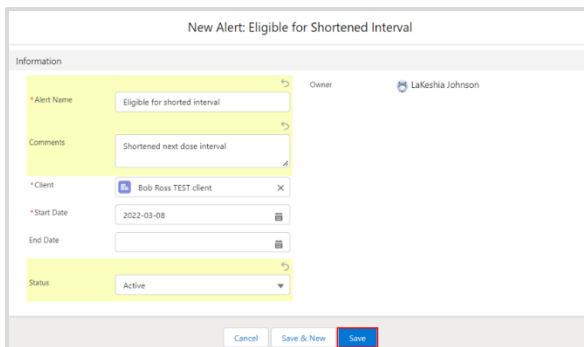
Note: If AEFI is recorded and the client immunization record status is updated to 'Entered in Error' then the AEFI checkbox on client record should be Blanked out/Unchecked.

If AEFI is recorded and the client immunization record status is updated to 'Entered in Error' and the client has immunization records with status value other than 'Entered in Error' then the AEFI Checkbox on client record should remain checked if the latest DA has the AEFI checkbox checked

- **Eligible for Shortened Interval** – may be used for clients who meet eligibility requirements for a shortened dose interval
- **Highest Risk** – maybe for clients considered to have a highest risk health condition

3. Populate the alert fields:

- **Alert Name*** – (required field) enter the alert type, followed by a description (e.g., ‘Warning: Fear of Needles’ or ‘Eligible for Shortened Interval’); see [further context](#) section below for eligibility
- **Comments** – any additional comments about the situation. For Shortened Interval clients, ‘Shorten 2nd Dose Interval – 28 days – [Reason]’ (Highest Risk, Indigenous Community, etc.) should be populated.
- **Client** – auto populated from the client record and should not be updated
- **Start Date*** – (required field) date the alert is being entered
- **End Date** – leave blank
- **Status** – input ‘Active’ when initially creating the alert

4. Click **Save**.


Once saved, users will be unable to delete alerts and only the creator of the alert can edit the **Comments**. After the relevant alerts have been reviewed/added, ensure that the client has completed the COVID-19 Assessment before progressing through the clinic. Once completed, proceed to process the client.

5. Read the disclosure statement out loud to the client. You may also find this disclosure statement in the clinical package to print out and post on-site if needed.
6. Obtain the client’s consent for data collection and check the **Consent for Data Collection** checkbox. This checkbox indicates if the client consents to their personal data being entered into COVaxON. This is a mandatory checkbox. If the client does not consent, no further data should be entered into COVaxON and the user must close this screen and continue with the offline paper process (refer to [Appendix A: Offline Document Process](#) for further details).
7. Populate the **COVID-19 Assessment Completed** checkbox. This is a mandatory checkbox.
8. Obtain the client’s **Consent for Research Communication** by reading the disclosure statement aloud. If the client consents, check either or both of the **Research Communication by Email** or **Research Communication by Text/SMS** checkboxes.
9. Select the relevant **Reason for Immunization** from the dropdown if not already populated. This is a mandatory field and the most accurate value should be selected. If the **Reason for Immunization** field is populated with a value of Congregate Living, Long Term Care, Retirement Home, or Child and Youth Eligible Population, the **Institution** field will become mandatory. For all other **Reason for Immunization** values selected, the Institution field is optional. For additional details on this, refer to [Appendix B: Client Record Best Practices](#).
10. Click **Next**.
11. Click **Finish**.

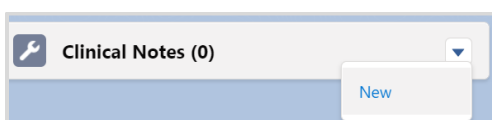
Further Context

- Users will receive a warning message if another dose administration record had been created for the same client in the last 24-hours, with the status 'Administered'.
- If a dose administration (DA) record was entered incorrectly, the DA status must be updated.
- If a client has the **Inactive** checkbox populated on their record, users will receive an error. The user must uncheck the box to proceed with processing the client.
- The minimum interval between doses is calculated based on the client's last administered dose in status 'Administered', 'Invalid' or 'Inventory Recalled'. This is because when a client's dose administration record status is changed to 'Invalid' or 'Inventory Recalled', the client did in fact receive the dose. However, they will require another dose if, for example, the dose was incorrectly administered (e.g., dose was invalid because the client received another vaccination too close to the COVID-19 vaccination), or the inventory was deemed not to be fully effective (e.g., inventory recalled).
- The **consent** information that is gathered will be reflected on the client's record.
- Clients who are eligible for **shortened dose intervals**:
 - Long-Term Care Home, Retirement Home, Advanced Age: Community Dwelling, Indigenous Community individuals
 - Highest Risk Clients (see below)
- The below conditions are considered **Highest Risk**:
 - Organ transplant recipients (including patients waitlisted for transplant)
 - Hematopoietic stem cell transplant recipients
 - People with neurological diseases in which respiratory function may be compromised (e.g., motor neuron disease, myasthenia gravis, multiple sclerosis)
 - Hematological malignancy diagnosed less than one year ago
 - Kidney disease eGFR < 30
 - One essential caregiver for individuals in the groups listed above
- Users will receive an error if a client has the 'Other Priority Population' **Reason for Immunization** tagged to their profile. To reconcile this, users must tag the client to 'Age Eligible Population' and proceed.

Clinical Notes

Description: Once the client record has been located and opened in COVaxON, add and review any clinical notes on the record. Once reviewed, proceed with processing the client. Users can add new clinical notes at any time throughout the immunization process.

1. From the desired client record, select the arrow next to *Clinical Notes*, then select **New**.



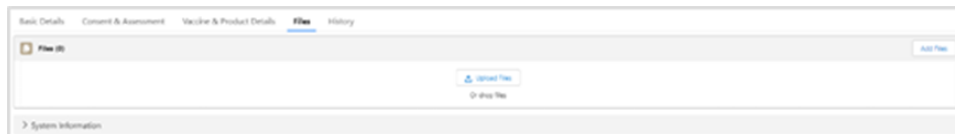
2. Populate the clinical notes fields:

- **Clinical Note Subject*** – (required field) type of note
- **Clinical Note*** – (required field) description of the situation
- **Clinical Note Status** – select **Active**

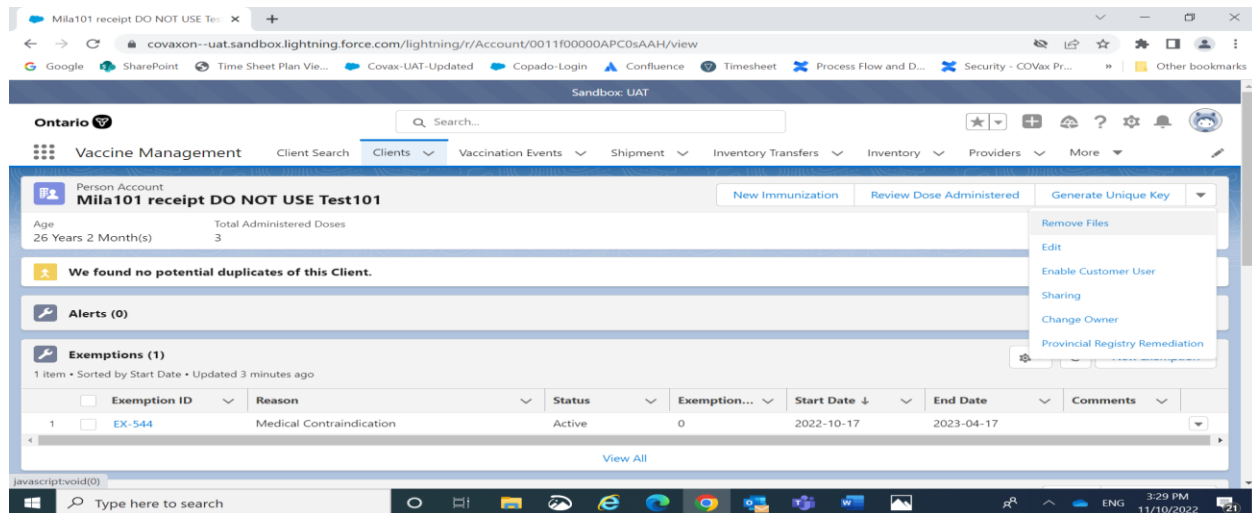
3. Click **Save**.

File Tab

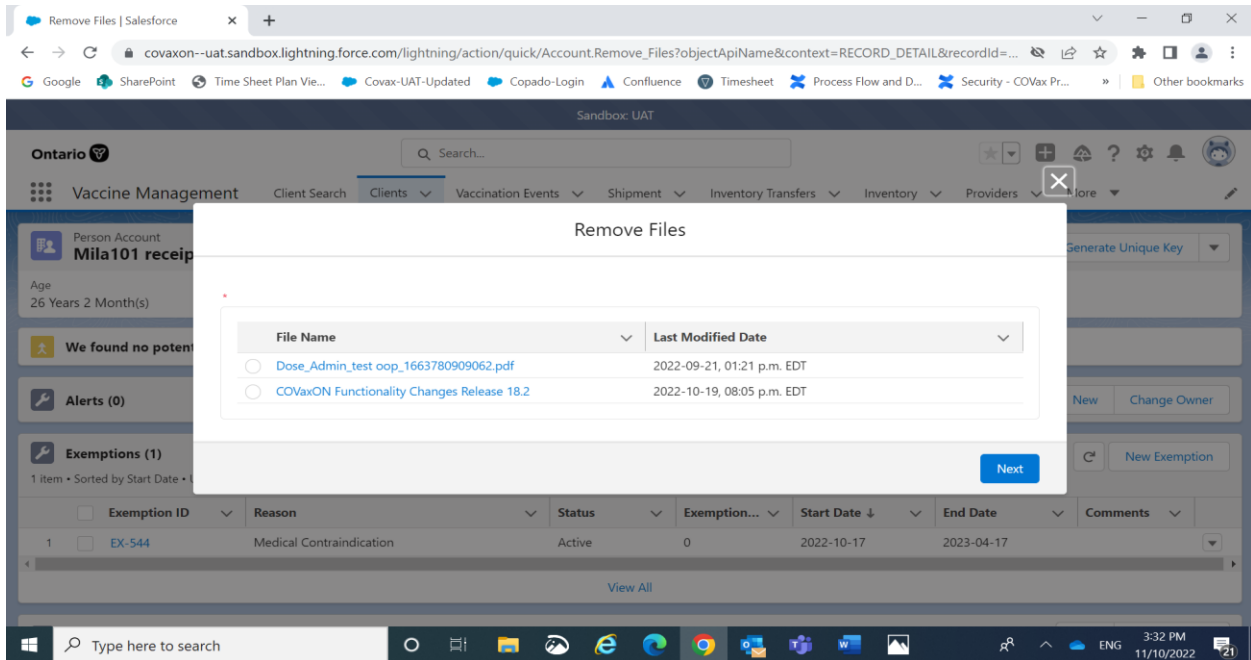
Description: provides users with the ability to upload required documents



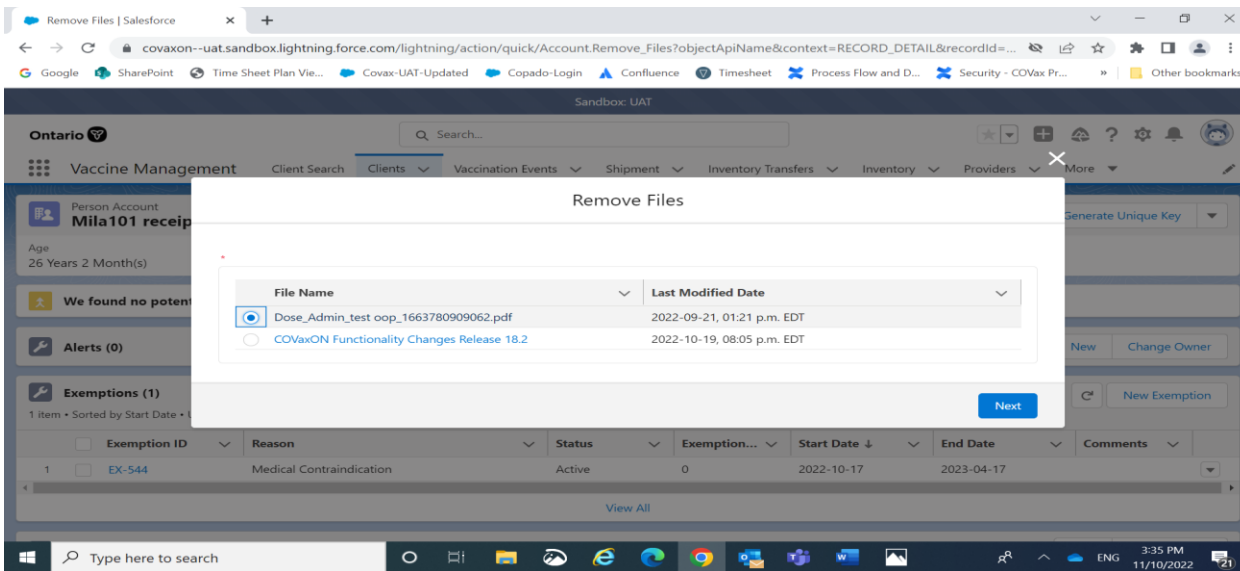
Note: Site Super profile can remove manually uploaded files within their AO.



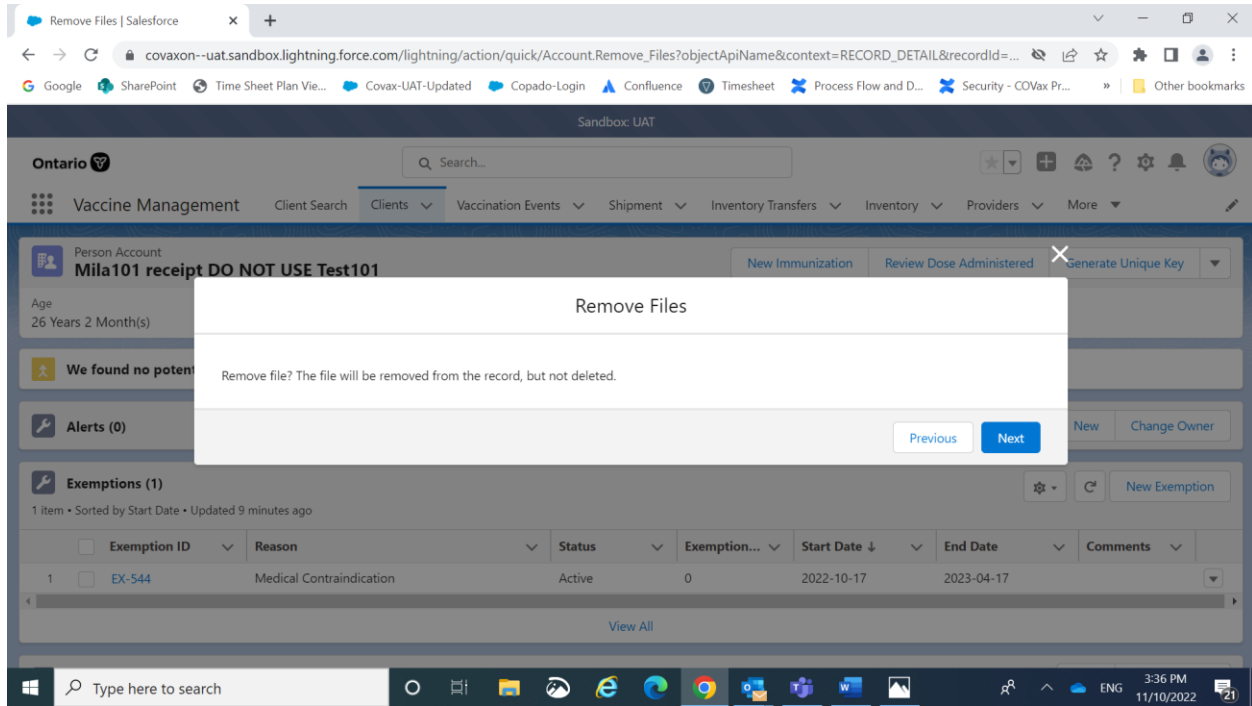
- 1) Step 1 : Click “Remove File” Option from the top dropdown
- 2) Step 2: Files list screen appears



3) Step 3: Select File needs to be removed and click Next button



4) Step 4: Following message will appear.



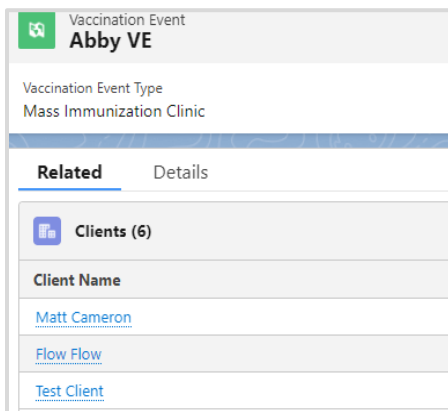
5) Step 5: Confirm by clicking "Next" and then click Finish. Selected files will be removed

Associate Client to Vaccination Event

Description: All clients must be associated to a vaccination event (VE) to successfully administer their dose in COVaxON. Associating clients to a VE can be done in two ways:

Individual Client Association: Manual VE association can be done by site staff, vaccinators, or site super users. In cases where a client was not uploaded and linked to the VE through a bulk client upload, the client can be associated to the VE by:

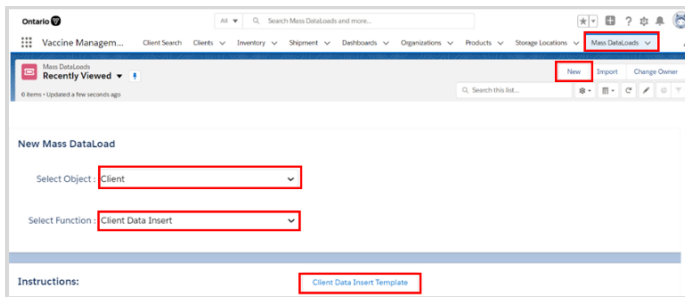
1. Searching for the client and following the steps to administer a dose. If a client is searched within the VE record, their client record will be linked to that VE.



2. Creating a client within a Vaccination Event after confirming they do not already exist in COVaxON. After the client has been manually created, follow the steps to administer a dose. The client will be linked to the VE that they are created under.
3. If the client is not found from the **Clients list** on the VE, manually add the VE to the client record after finding their record from the **Client Search** tab.
4. If the client is not found from the **Clients list** on the VE or from the **Client Search** tab, create the client record and add the VE to the client record.

Client List Upload: Uploading multiple clients at once can be done through the process of bulk client upload. This function can only be performed by site super users and is specific to hospitals, PHUs, long-term care homes, retirement homes and clinics. Refer to the **11 – Bulk Client Upload** job aid for instructions on this process. The following section provides context into this activity.

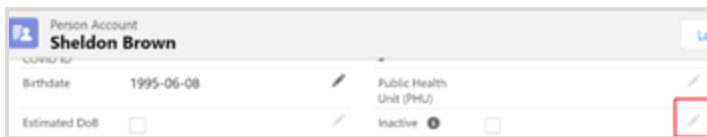
1. When a VE is created, a **Vaccination Event #** is autogenerated as a unique ID for the VE and can be found on the VE record. When bulk uploading clients, there is a column on the CLIENT_LOAD_TEMPLATE which is used to indicate the VE clients are associated to. The user can select the **Vaccination Event** from the **Defaults** tab and this will auto populate the VE into the specified column for each client on the CLIENT_LOAD_TEMPLATE. This will associate the clients who are bulk uploaded to that particular VE.



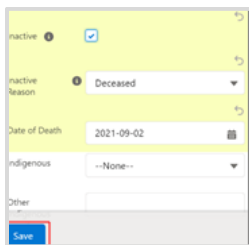
Mark Client as Inactive

Description: From the client record, clients can be marked as **Inactive**. This will remove the client’s name from any list views on the **Clients** tab, and the client record will no longer be used/updated in COVaxON.

1. Go to the desired client’s record.
2. Click on the **Pencil** icon next to any field on the client record to update.



3. Click on the checkbox next to **Inactive**.
4. Select an **Inactive Reason** from the dropdown. Options include ‘Deceased’ or ‘Moved out of Province’.



5. If ‘Deceased’ is selected and the **Date of Death** is known, select a date. If the **Date of Death** is unknown, this field can be left blank.
6. Click **Save** on the client record.

4. Merge Duplicate Client Records

Description: When a duplicate client record is discovered in COVaxON, the two client records can be merged by site super users to eliminate the duplicate record in the system. If a duplicate record is not discovered by COVaxON, but a user would like to merge the client records, they can manually link duplicates and then merge the records.

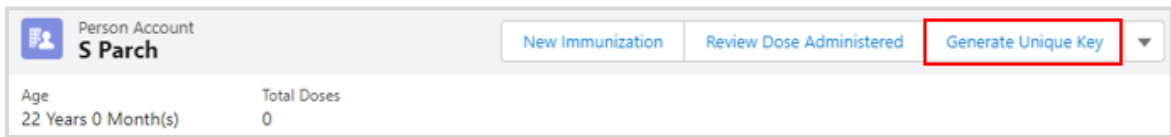
Note: Including a health card number for a client (if available) on their record is the best defense against creating duplicate clients.

If COVaxON does not recognize the client records as duplicates, refer to step A. If COVaxON does recognize the client records as duplicates, skip to step B below.

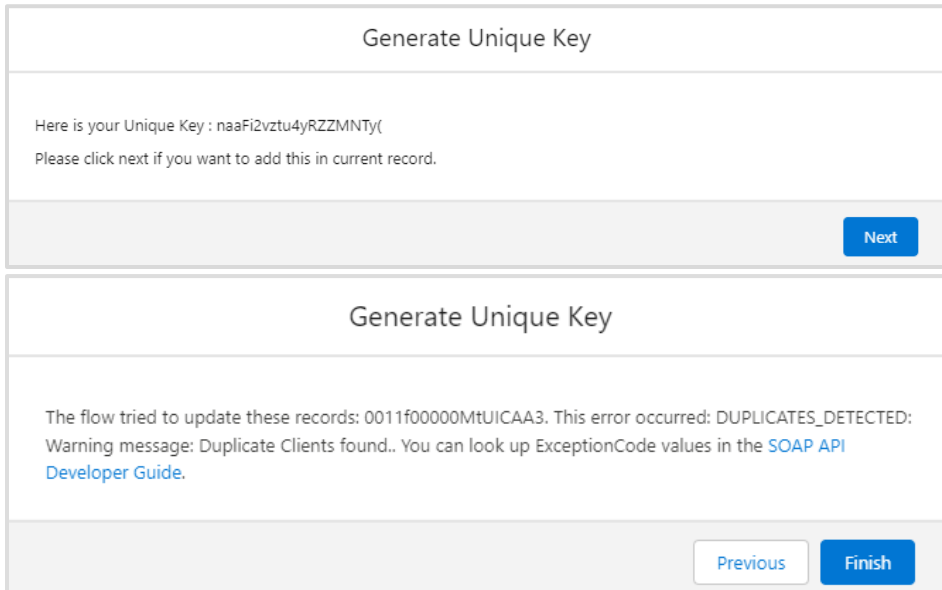
A. COVaxON does not recognize duplicate records

If a duplicate is not detected in COVaxON AND it is confirmed that the 2 client records are in fact duplicates, there is an alternative method to recognizing them as duplicates in COVaxON:

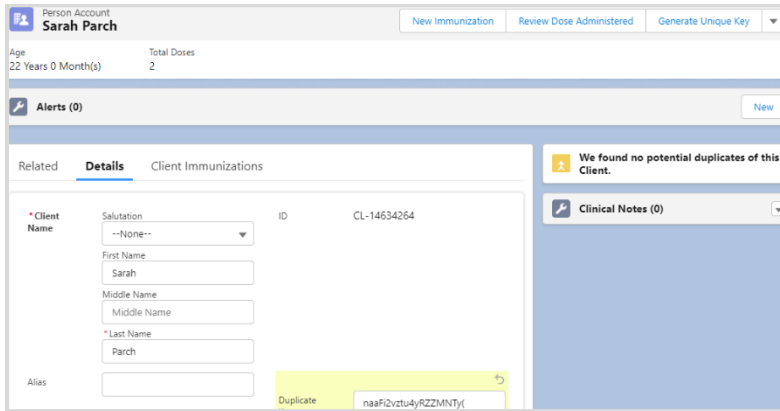
1. From one of the client records that is identified as a duplicate, click **Generate Unique Key**.



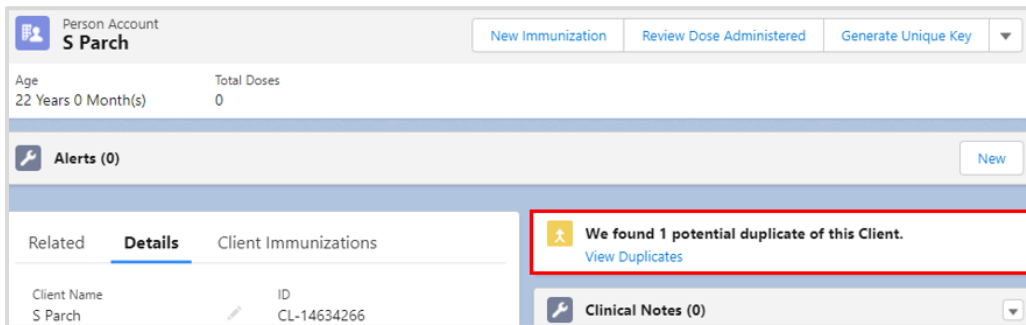
2. A **Generate Unique Key** window will appear. Select **Next** and then **Finish**. Note that if the system recognizes there is a duplicate, it will generate a pop-up message to indicate an error has occurred (see screenshot) and a duplicate key will not be generated.



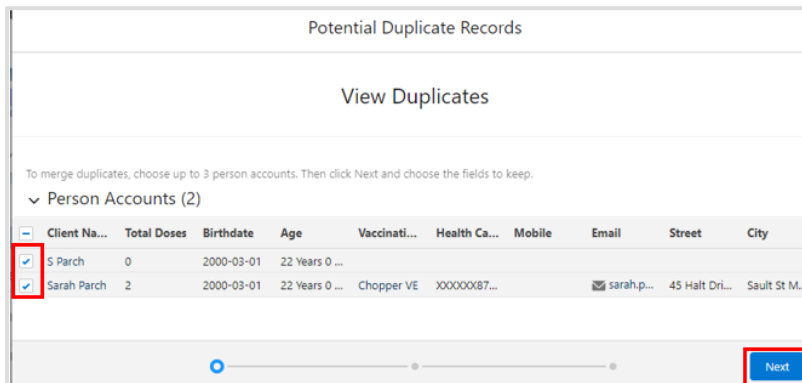
3. This will add a **Duplicate Key** field to the client's record. Copy the duplicate key by highlighting it, right clicking, then selecting 'Copy'.



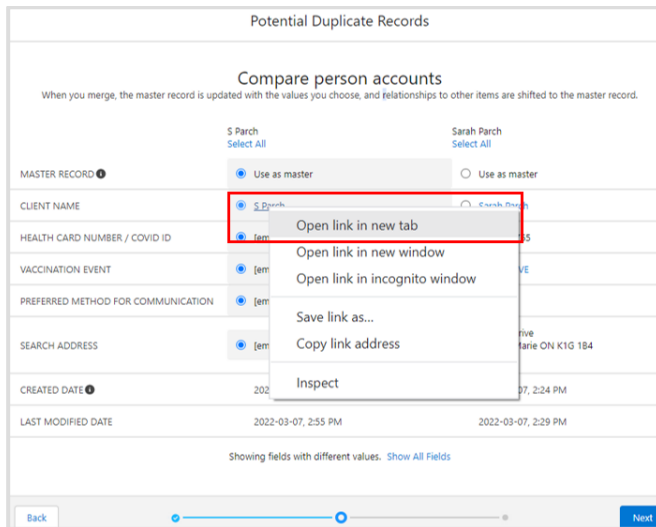
4. The user should then locate the second client record that has been identified as a duplicate.
5. Paste the duplicate key from the first client’s record, into the **Duplicate Key** field on the second client’s record. This will create a link between the two records in COVaxON and the **View Duplicates** option will appear.
6. Select **View Duplicates** and the duplicate client records will appear in a new window.



7. Select all client records and click “Next” to compare.

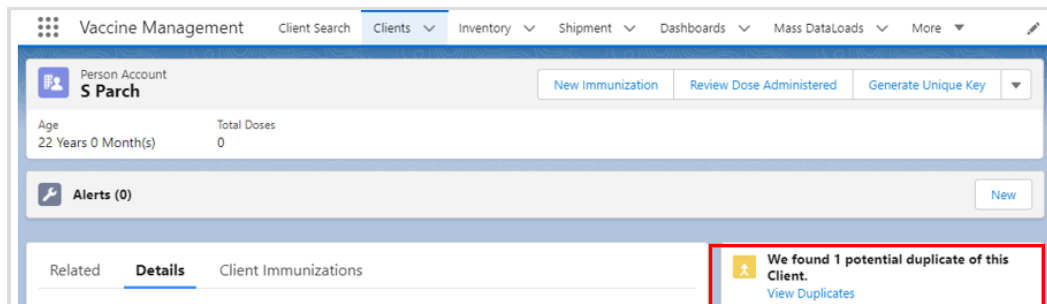


- a. On the **Potential Duplicate Records - View Duplicates** page, right click on the client’s name hyperlink and select **Open Link in New Window** for both clients. Review the details on both client records to ensure that these two clients are the same client. Validate details such as name, date of birth, address, etc.



B. COVaxON recognizes duplicate records

- The client records page will show that the client is a duplicate on the right-hand side of the record (for any newly created clients, or any previously created clients).



- Click on **View Duplicates** and the duplicate client records will appear in a new pop-up. Follow steps 7 onwards from step A.

Modify Dose Administration Records: After reviewing and confirming the two records are in fact the same client, first check the dose administration records on each record to determine if they are valid as any dose administration records from the non-surviving record will be saved to the surviving record. For any doses that are not accurate and should be cancelled, **the dose administration record status should be changed to 'Invalid' or 'Entered in Error' (depending on the scenario) prior to performing the merge.** Please refer to **04 – New Immunization Record – Administered** job aid for details on changing dose admin status to 'Invalid' or 'Entered in Error'.

C. Once COVaxON recognizes that the client records are duplicates, a client record merge can be performed

- Before a merge can be completed, the existing client dose administration records should be reviewed. Please refer to the details in section B above.
- Return to the **View Duplicates** screen.

- Select the checkbox for *both* clients, then click **Next**.

Potential Duplicate Records

View Duplicates

To merge duplicates, choose up to 3 person accounts. Then click Next and choose the fields to keep.

Person Accounts (2)

<input type="checkbox"/>	Client Na...	Total Doses	Birthdate	Age	Vaccinati...	Health Ca...	Mobile	Email	Street	City
<input checked="" type="checkbox"/>	S Parch	0	2000-03-01	22 Years 0 ...						
<input checked="" type="checkbox"/>	Sarah Parch	2	2000-03-01	22 Years 0 ...	Chopper VE	XXXXXX87...		sarah.p...	45 Halt Dri...	Sault St M...

Next

- Select the record to indicate which record should be considered the *master*. The master record will become the surviving record's client name.
- Select the fields that should be saved on the master between the two records (which phone number, address, etc. should be saved on the surviving record). **Note:** Only the records that don't match will appear from the main screen. You can select **Show All Fields** to review other fields on the client record. Refer to the **Considerations for Merging Certain Fields** section below for further details.

Potential Duplicate Records

Compare person accounts

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

	S Parch Select All	Sarah Parch Select All
MASTER RECORD	<input checked="" type="radio"/> Use as master	<input type="radio"/> Use as master
CLIENT NAME	<input checked="" type="radio"/> S Parch	<input type="radio"/> Sarah Parch
HEALTH CARD NUMBER / COVID ID	<input checked="" type="radio"/> [empty]	<input type="radio"/> 1234598765
VACCINATION EVENT	<input checked="" type="radio"/> [empty]	<input type="radio"/> Chopper VE
PREFERRED METHOD FOR COMMUNICATION	<input checked="" type="radio"/> [empty]	<input type="radio"/> Email
SEARCH ADDRESS	<input checked="" type="radio"/> [empty]	<input type="radio"/> 45 Halt Drive Sault St Marie ON K1G 1B4 Canada
CREATED DATE	2022-03-07, 2:32 PM	2022-03-07, 2:24 PM
LAST MODIFIED DATE	2022-03-07, 2:55 PM	2022-03-07, 2:29 PM

Showing fields with different values. [Show All Fields](#)

Next

- Once all correct values have been selected, click **Next**.
- Then click **Merge** to confirm the merge. The merge typically happens immediately, but it may take up to 2 minutes. Refresh the client record to see the updates if there is a delay.

Potential Duplicate Records

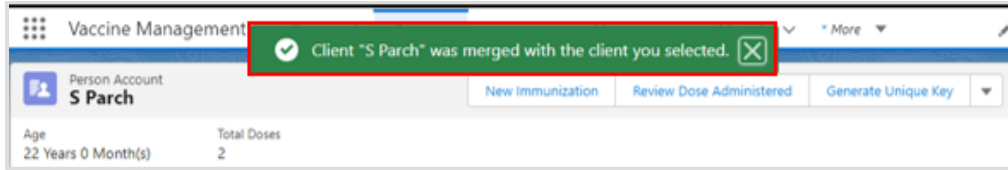
Confirm merge

We're ready to merge these records

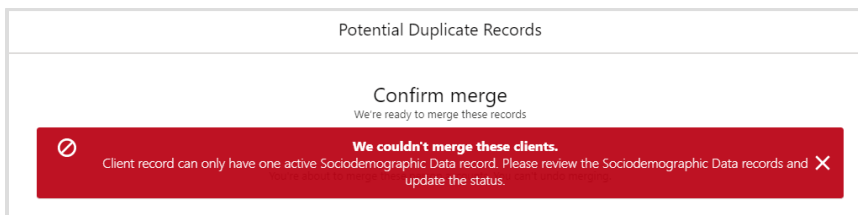
You're about to merge these person accounts. You can't undo merging.

Merge

8. A notification is sent to the user who performed the function that the merge was successful. After a merge is completed, the duplicate key (if relevant) is automatically removed from the merged client's record.
9. The COVaxON system now recognizes the two client records as duplicates. Proceed to section B below.



Note: Clients can only have one active sociodemographic record on their client record. If attempting to merge two client records which each have an 'Active' sociodemographic record, you will receive this error and you will be blocked from continuing with the client merge.



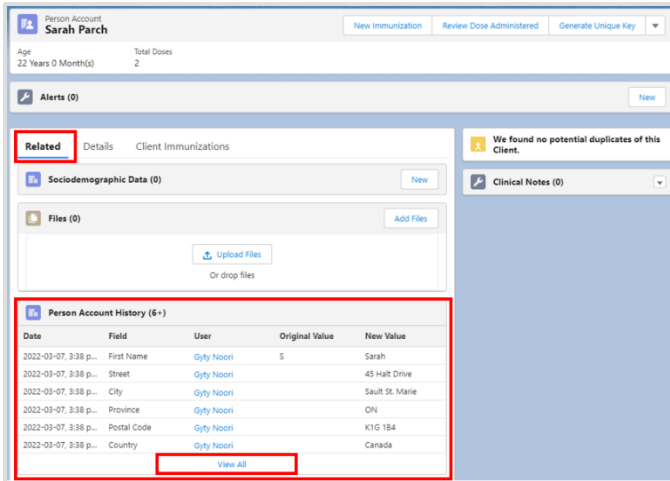
To correct this, determine which Sociodemographic record is accurate, and change the status of the inaccurate one to 'Duplicate/Merged-Obsolete'. Once the status is updated, a client merge can be attempted again and will be successful.

D. Considerations for merging certain fields

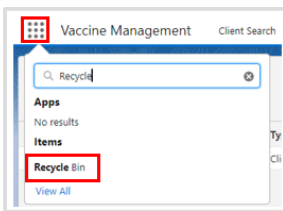
- The status of the surviving client record will not be based on what is selected from the **Compare person accounts** screen above. The status of the client on the surviving record will be populated based on the number of dose administration records in status 'Administered'. A field **Total Dose** is available on the client record to support this logic. For example, if there are 2 dose administration records on a client record in status 'Administered', the **Total Dose** field will display '2'.
- **PHU/Postal code** – these two fields must be selected as a pair (both selected from the same client record). This is because the PHU field is populated automatically based on the postal code.
- **Email Notifications** – clients will receive a notification email with the link to CANVAS research if the merge results in the checkbox being selected on the surviving record.
- On the merge client screen, when selecting the master record and the values that should remain on the surviving client record, the **Reason for Immunization** field must be from the master record.

E. History of the Merge/Restoring the Merge

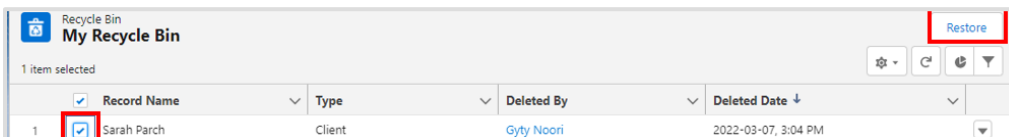
- The history of the fields of the non-surviving record can also be viewed from the Person Account History. From the new client, in the Person Account History section in the **Related** tab, select **View All**.



- From the Person Account History, users can see the original value and the new value.
- After a merge is completed, the non-surviving record can be accessed from the Recycle Bin. It will no longer contain any dose administration records since they were merged with the surviving record. If an incorrect merge was performed on a client with a dose administration record, there is no current solution built in the system to move the dose administration record back to the deleted client. It is essential that the clients are reviewed in detail prior to performing a merge.
- To restore a deleted client:** Select the 9 dots (⋮) at the top right corner of the screen in COVaxON, search and select 'Recycle Bin'. The recycle bin is emptied every 15 days, so 15 days after the merge, the old record will not exist.



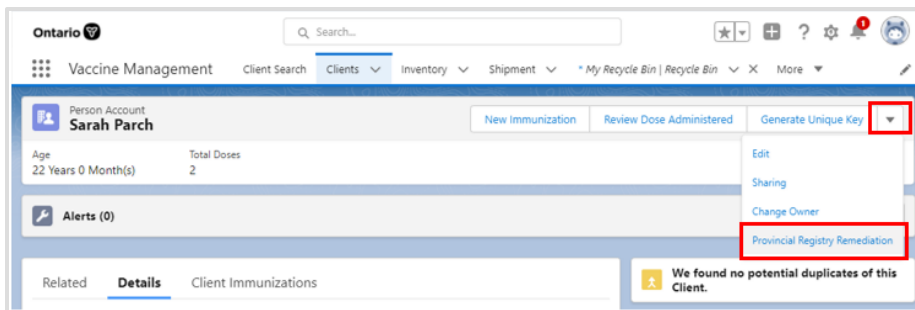
- Locate the non-surviving record. Select the checkbox and select **Restore**. This should only be done when it is confirmed the merge was a mistake and is not in fact a duplicate client.



5. Reconcile Partial Address Information on the Client Record

Description: There is daily integration that runs to compare the information in the Provincial Registry to client records in COVaxON. The information in the Provincial Registry will never override the existing information in COVaxON, it is only used to supplement existing information on client records. To enhance client record information, site super users can reconcile information on the client record with the information stored in the Provincial Registry (such as addresses that are only partially filled out).

1. Go to the desired client's record and click on the dropdown arrow and select 'Provincial Registry Remediation'.



2. Compare the information listed in COVaxON and the Provincial Registry. The information in COVaxON can be found in the **Value On Client** column, and the information from the Provincial Registry can be found in the **Value In Provincial Registry** column. The information that is populated in the **Value To Be Updated** column is what will ultimately be saved on the client's record. Users can update the fields in this column by using the copy and paste function from the **Value On Client** column fields.
3. Click **Next** and then **Finish**.

Provincial Registry Remediation			
Please review the following fields for client with HCN 8103394063			
Field Name	Value On Client	Value In Provincial Registry	Value To Be Updated
Last Name	YVEDLMS	YVEDLMS	<input type="text" value="YVEDLMS"/>
First Name	NORMA	NORMA	<input type="text" value="NORMA"/>
Middle Name	BARBARA	BARBARA	<input type="text" value="BARBARA"/>
Date of Birth	November 13, 1930	November 13, 1930	<input type="text" value="Nov 13, 1930"/>
Gender	Female	Female	<input type="text" value="Female"/>
Street		BOX 44	<input type="text"/>
City		WELLESLEY	<input type="text"/>
Province		ON	<input type="text"/>
Postal Code	MSV 0L7	NOB 2T0	<input type="text" value="MSV 0L7"/>

The client record will be successfully updated with the values pulled from the Provincial Registry.

Appendix A | Offline Document Process

Description: There are 4 situations whereby data cannot be captured in COVaxON and offline MS Word document forms (COVaxON Vaccine Data Entry & Manual Receipt Form) must be used to capture the client's vaccination information.

Situation for Offline Documentation	Resolution
The client doesn't consent to data collection; in this case, the client information should be documented outside of COVaxON	The form should be stored following location procedures and the data should not be entered into COVaxON.
The COVaxON system goes down (connectivity is lost) during vaccinations taking place	The forms should be used to enter the data into COVaxON by a user with access when it is available. The data should be entered in COVaxON retroactively within 72-hours of the vaccination date.
A mobile vaccination team conducting vaccinations at a rural/remote location without connectivity	
A temporary team of staff are conducting vaccinations who are not trained on COVaxON or are not users of COVaxON	

There are various versions of offline data entry forms depending on the vaccine product. They are contained within the Ministry of Health SharePoint site. There is a dedicated contact person per location that has access to SharePoint and can disseminate the documents.

Appendix B | Client Record Best Practices

Description: On the client record, ensure that as much information is completed as possible. This will ensure that client records are accurate and contain the information required to validate the client's identity and avoid duplicate client record creation.

Required Fields:

- **Last Name** – the first name is not required, but should be entered
- **Gender** – select a gender from the dropdown options available
- **Date of Birth** – select DOB using the calendar icon, YYYY-MM-DD
- **Reason for Immunization** – this field should be populated on the client record. This is a mandatory field, and the most accurate value should be selected. If the Reason for Immunization is set to Congregate Living, Long Term Care, Retirement Home, or Child and Youth Eligible Population, the Institution field (see below) will become mandatory.
- **Vaccination Event** – this field should be populated on the client record. Populate based on where the client is physically receiving the vaccine.

Client Name	Bob Ross TEST client	
Alias		
Health Card Number / COVID ID		
Birthdate	1948-08-18	
Estimated DoB	<input type="checkbox"/>	
Gender	Male	

Vaccine Related

Any Adverse Events After Immunization?

Appropriate Documentation Shown

Vaccination Event	Lakeridge Health Oshawa - Better Way Retirement Home	
Reason for Immunization	Long Term Care: Resident	
Institution	Twin Lakes Terrace Long Term Care Community [NH4402]	

Total Valid Dose: 1

Primary Care Provider	John kane, Nurse Practitioner, code12	
-----------------------	---------------------------------------	--

Other important fields that, if possible, should be completed:

- Health Card Number / COVID ID (10-digits only)** – best unique identifier to prevent duplicate clients in COVaxON. If a client does not have an HCN, request an **Alternative ID** to be provided (driver’s license, passport, birth certificate, etc.). If the Alternative ID field is populated with ‘Other’, then the **Other Alternative ID – please specify** field should be populated using free text. In addition, a COVID ID can be documented in this field if it was generated by select PHU users with the ‘Customer Service Agent COVID ID’ permission set.

Alternative ID:

Other Alternative ID - Please specify:

Alternative ID #:

- Indigenous** – if the client is identified as Indigenous, indicate the specific status using the dropdown list. If the relevant option is not available from the dropdown, select ‘Other Indigenous’ and populate the value in the **Other Indigenous Specify** field.

Indigenous:

Other Indigenous specify:

Please specify other indigenous

- Primary Care Provider** – identify the client’s primary care provider (PCP) using the search bar. PCPs can be searched in COVaxON by a variety of criteria (first, middle, last names, phone number, etc.). To search PCPs:

- On the client record, begin typing the provider’s identifier (for example, the PCP’s first or last name) into the search bar, then select **Show all results for [identifier]**, and a second window will appear.

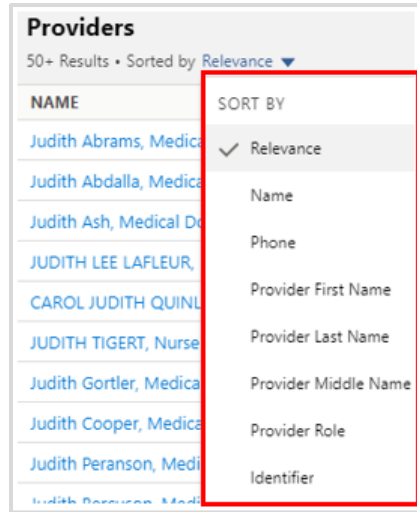
Primary Care Provider

search term:

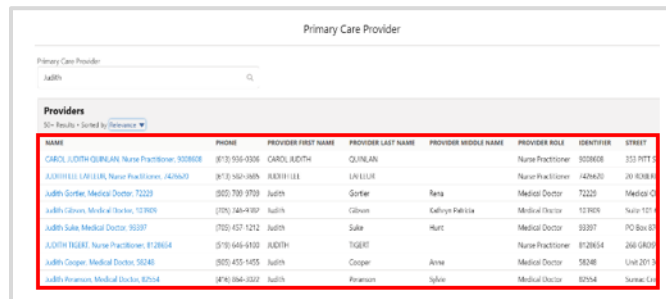
Search:

- Judith Ash, Medical Doctor, 23137 4166189224
- Judith Abdalla, Medical Doctor, 57488 9737077481
- Judith Abrams, Medical Doctor, 53644 6135623665
- JUDITH LEE LAFLEUR, Nurse Practitio... 7054571212
- Judith Suke, Medical Doctor, 93397
- New Provider

- From the new window, click on the dropdown menu to **SORT BY** the preferred identifier (this is optional).



- Identify the correct provider and click on the hyperlink under the **Name** column to add them to the client record.
- Click **Save** on the client record.



- Institution** – if the **Reason for Immunization** field is populated with a value from Congregate Living, Long Term Care Home, Retirement Home, or Child and Youth Eligible Population, the **Institution** field will become mandatory. For all other Reason for Immunization values selected, the institution field is optional.

- If the institution is not found on the existing list, the user can choose an appropriate value from one of the picklist values below:

Institution ID	Institution Name
SC0001	Home School
SC0002	Not in School
SC0003	School: Unlisted
SC0004	Post-Secondary School

- When the user selects 'Child and Youth Eligible Population' as the **Reason for Immunization**, the **Institution** becomes mandatory. The user can search the list by typing the childcare services' name based on Home Child Care Agency or Licensed Child Care Center, and it will display records available for selection. If the childcare services record is unlisted, the user can choose the following from the picklist values:

Institution ID	Institution Name
LCC0001	LCC0001 – Unlisted: Licensed Child Care Center
HCC0001	HCC0001 – Unlisted: Home Child Care Agency

- **RIM Youth 12+** – client records with RIM value ‘Youth 12+’ will be mapped to ‘Child and Youth Eligible Population’
- **Contact Details** – with the client’s consent, collect contact information (phone number and/or email address). If the client would like to receive their immunization receipt via email, the email address field must be populated, and the **Preferred Method for Communication** should be set to email.
- **Address** – users should type the client’s provided address into the **Search Address** field, which is integrated with Google maps, and the address details will be populated on the client’s record automatically
- **Public Health Unit** – PHU field on the client record is auto populated based on the client’s postal code. If the mapped PHU is incorrect, users may update the PHU on the client record. If the postal code is deleted from the client record, the PHU remains

Further Context

- If a client is associated to a retirement home that is unlicensed and therefore is not an option from the search field, select the ‘Retirement Home: Not Listed’ option
- The **Reason for Immunization** values can change over time and therefore if editing a client record with a retired value, an error will be produced. If an edit to a client record is required and the client has received all doses and is therefore not returning, and if the Reason for Immunization on their record is ‘COVID-19: Other employees in acute care, long-term care, retirement homes’, the reason will need to be updated to proceed. Update the reason to the correct value. Institutions are required for Congregate Living, Long Term Care Home, and Retirement Home values, and since the client will not be returning to confirm their institution, select one of the relevant placeholders below:
 - Congregate Living: Unknown (Historical)
 - Long Term Care: Unknown (Historical)
 - Retirement Home: Unknown (Historical)

Appendix C | Extra Dose Documentation

Description: Based on provincial guidelines, extra doses of the COVID-19 vaccine can be administered to select clients. The term *extra dose* refers to any dose of the COVID-19 vaccine that is administered in addition to the two previous COVID-19 vaccine doses that a client has received. This means that a client has received an extra dose(s) if they receive 3 or more doses of the same COVID-19 vaccine product. They also have received an extra dose(s) if they have received 3 or more of a combination of COVID-19 vaccines (since certain COVID-19 products have been administered interchangeably).

Current Eligibility:

As of August 18, 2021, groups eligible for a third dose include:

- Individuals who are recipients of, undergoing, or imminently starting:
 - Transplants (including solid organ transplant and hematopoietic stem cell transplants)
 - An anti-CD20 agent (e.g., rituximab, ocrelizumab, ofatumumab)
 - Stable, active treatment (chemotherapy, targeted therapies, immunotherapy) for malignant hematologic disorders
- Residents of long-term care homes, high-risk retirement homes, and elder care lodges

How to record Extra Doses through the Immunization Flow process:

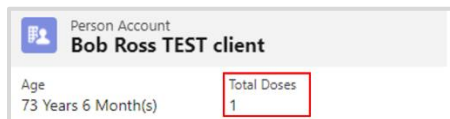
Extra doses are recorded in the same way as dose 1 and dose 2. To record an extra dose from the client record:

1. Verify that the appropriate **VE** is selected (based on the physical location/site the client is receiving the dose at). If needed, click on the **X** to update the client's VE, then search for and select the appropriate VE.

Based on eligibility as of August 18, 2021, the following three **Reason for Immunization** values can be used for extra dose administration:

#	Reason for Immunization	Definition
1	Long Term Care: Resident	An individual whose primary residence is in a long-term care home including First Nations elder care homes
2	Retirement Home: Resident	An individual whose primary residence is in a retirement home
3	Person with Priority Health Condition (<i>confirm with policy</i>)	An individual with a health condition that places them at an increased risk of severe outcomes from COVID-19. For a list of health conditions see <i>COVID-19: Guidance for Prioritization of Phase 2 Populations for COVID-19 Vaccination</i>

2. Once the extra dose is successfully recorded, it will be added to the **Total Doses** cumulative field. The **Total Doses** field indicates the number of dose administration (DA) records that have been recorded for valid doses (with the DA record status of 'Administered').



Person Account
Bob Ross TEST client

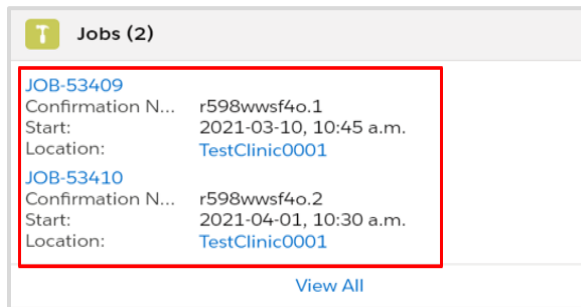
Age
73 Years 6 Month(s)

Total Doses
1

Appendix D | Verifying Appointment Confirmation

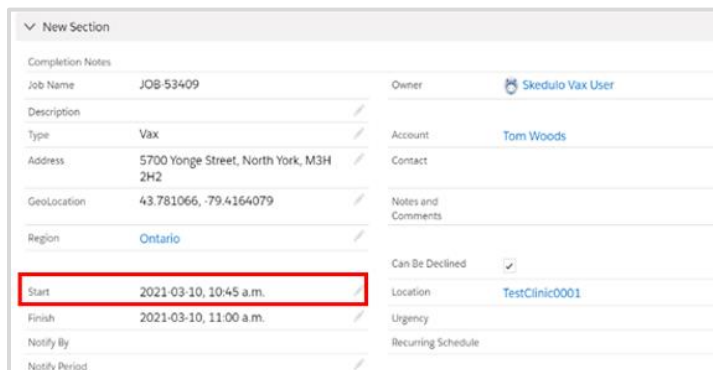
Description: For clients who have scheduled their appointment(s) using the provincial Vaccination Appointment Booking (VAB) system, you must verify that they have successfully booked their appointment before processing them into COVaxON. To verify this, you will have to locate a confirmation code on the client's record.

- From the client record, navigate to the **Related** tab and see the *Jobs* section. A 'job' is the term used for a booked appointment in COVaxON.



- All clients who have booked their appointments will have 2 job records on their client record. Therefore, if there is no job associated to the client's record, they have not scheduled an appointment in VAB.
- Each job record will include a **Confirmation Number**. In most instances:
 - The number that ends in '.1' indicates the client's first appointment
 - The number that ends in '.2' indicates the client's second appointment

Note: Appointments can also be confirmed by ensuring that the date/time of the appointment are aligned with the client's arrival date/time.



- Click on the relevant job record (either dose 1 or dose 2) to view the appointment details. If the client is early or late for their appointment, follow location procedures to determine if the client can still be admitted for their appointment or reschedule for another time.

Note: It is important to ensure that the client's VE matches the VE they have arrived at. When clients use the VAB booking system to schedule their appointments, they may have chosen the wrong VE or the wrong day by mistake.