

## New Immunization Record – Administered

Record client’s administered (in real time) vaccine dose in COVaxON.

### Profiles

Vaccinator, PCP Vaccinator, Clinic Coordinator, Site Super User

### Core Tasks

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

#	Section	Description
1.	<a href="#">Confirm Client Identity</a>	When client arrives, search for their record in COVaxON by using either the <a href="#">Client Search</a> or <a href="#">Vaccination Events</a> tabs or global search.
2.	<a href="#">Create New Immunization Record – Administered</a>	<b>Administered with Vaccination Event Inventory (VEI)</b> – dose record administered at a point-of-service location with vaccine event inventories (VEIs) linked to a vaccination event (VE) that needs to be tracked by an authorized organization (AO).
3.	<a href="#">Review Immunization Record Details</a>	<p><b>Basic Details</b> – displays client information and the dose administration record information.</p> <p><b>Consent and Confirm Pre-Screening Assessment</b> obtain and record consent for service from client/proxy/substitute decision maker and confirm pre-screening assessment was communicated with client.</p> <p><b>Vaccine &amp; Product Details</b> – review and confirm dose information details.</p> <p><b>Files</b> – provides users with the ability to upload required documents (e.g., proof of vaccination, exemption forms).</p> <p><b>History</b> – an audit tracking and log of changes to the dose record.</p>
4.	<a href="#">Monitor for AEFI</a>	Direct client to self-monitor for adverse reaction following immunization (AEFI), then the client dose administration can be completed.
5.	<a href="#">Document Potential AEFI Occurrence</a>	Direct clients to monitor for AEFI. Once the 15-minutes (or longer if directed) has elapsed for AEFI monitoring, users can locate the client’s record in COVaxON and document AEFI, if needed.
6.	<a href="#">Change the Status of an Immunization Record</a>	Change the status of a client’s immunization record if it was entered in error, invalid, invalid – SCT (Stem Cell Therapy) and CAR-T or associated with a recalled inventory.
7.	<a href="#">Immunization Record Under Investigation</a>	Dose record under investigation on suspicion of vaccine validity. Refer to <i>Guidance for PHUs – Verification of Vaccine Receipts</i> .
8.	<a href="#">Extra Dose Documentation</a>	Based on provincial guidelines, extra doses of the COVID-19 vaccine can be administered to select clients.

### Additional Information

- **Vaccination Events (VEs)** – a record type that represents the location where vaccinations are physically being administered. For example, hospitals, clinics, pharmacies, mass immunization clinics, long-term care homes, retirement homes, nursing homes, mobile/drive through clinics. **Authorized organizations (AOs)** are the organizations that own and allocate inventory to VEs. Once a VE is setup, clients can be linked to the VE and the vaccine administration process can begin.
- **Vaccination Event Inventory (VEI)** – when an inventory manager is planning supply for a vaccination event and intends for the inventory to be tracked, the inventory manager creates a vaccination event inventory from the AO inventory records (IRs). The VEI tracks vaccine supply utilization for a vaccine event by linking one AO IR to one or more VEs, and one or more IRs may be used to supply one or more VEs. The vaccine event inventory is utilized by the vaccinators for the selection of product lots from inventory when administering doses to clients.
  - **VE + Tracked Inventory (VEIs)** – this original business scenario for COVaxON inventory supports provincial and AO prioritization of inventory tracking through auto-decrement at the VE. This ensures AO accountability of vaccine stock and supports any future pandemic or other mass immunization clinic use cases where strict control over inventory is required. This scenario is only applicable for the ‘Administered’ vaccination type where clinicians are the source of the dose administration being recorded at the point-of-service.

### Reference Documents

- Refer to the **01 – Introduction to COVaxON and User Setup** job aid to learn more about system access
- Refer to the **02 – Create Vaccination Event** job aid to learn more about creating VEs, linking to VEIs and VEPLs in COVaxON
- Refer to the **03 – Search, Create and Maintain Client** job aid to learn more about searching for a client and creating new client records in COVaxON
- Refer to the **05 – New Immunization Record – Historical** job aid to learn more about recording out of province and non-Ontario stock vaccine records

### 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 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.

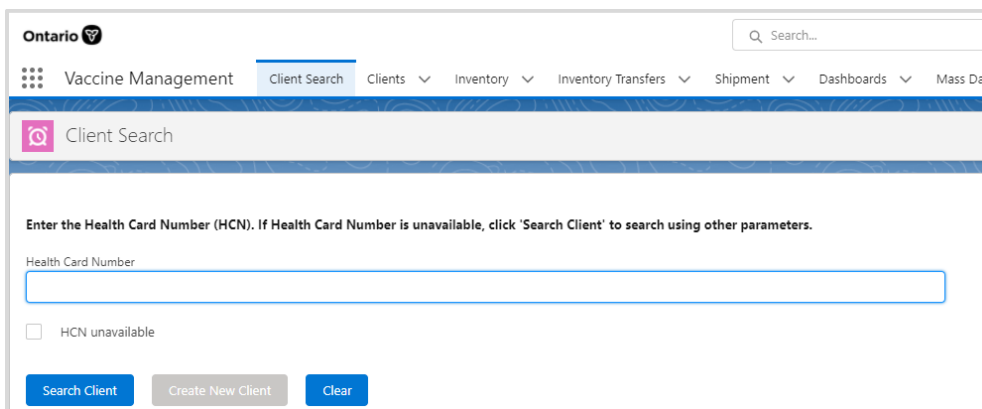
## 1. Confirm Client Identity

**Description:** Once the client arrives at the vaccination station, confirm their identity by looking at the details on their client record.

Client records can be found using either the **Client Search** tab or the **Vaccination Events** tab.

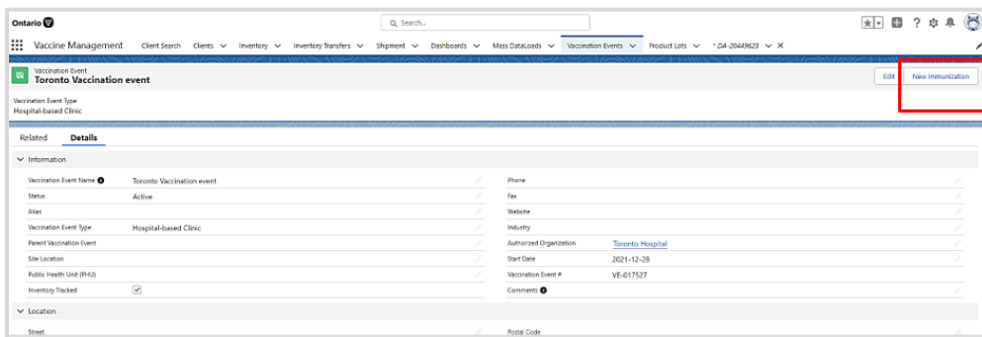
### From Client Search:

1. Open the **Client Search** tab and search for a client using their health card number (HCN) or Covid ID if available. Otherwise, search using first name, or last name and one other parameter. If a client record populates, open the client record and ensure that the client is tagged to the correct VE. Refer to the **03 – Search, Create and Maintain Client** job aid for more details and steps on how to locate or create a new client record.

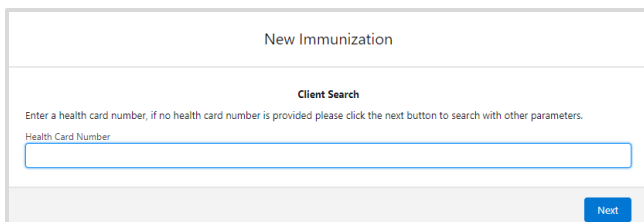


### From Vaccination Event Record:

1. Open the relevant vaccination event record and click on the **New Immunization** button on the top left corner of the VE page.



2. Leverage the search capability to enter a health card number (HCN) if available or click **Next** and enter specific client details. **Note:** COVaxON saves previous sorting/filtering. When searching for a new client, remember to clear any previous filters.



New Immunization

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**Client Search**

No client record found, or client is inactive in COVax, please search with first name and/or last name with additional parameters.

Enter First Name

Enter Last Name

Enter DOB

Enter Postal Code

Previous Next

3. Once the client is identified, click on the **Client Name** hyperlink, and open the client record.
4. Once the client record is opened, it is essential that the client’s identity is properly validated to ensure the correct record has been accessed. Validate the client by health card number (HCN), if they have one, or by name plus other fields such as date of birth, postal code, etc.

**TIP** – if the client is already associated to a VE, you can also locate the client from the VE by selecting the **Related** tab to view the list of clients shown on the **Client list** view.

Client Name	Health Card Number / COVID ID	Birthdate	Age
<a href="#">Chris Miron</a>	XXXXXXXXXX10	2006-06-16	15 Years 5 Month(s)
<a href="#">Iari</a>		2021-08-27	0 Years 5 Month(s)
<a href="#">Doris Booth 2988</a>		2021-12-28	0 Years 1 Month(s)
<a href="#">Mehmet Kocak</a>		2006-12-21	15 Years 1 Month(s)
<a href="#">Rogge</a>		1921-12-02	100 Years 2 Month(s)
<a href="#">DA</a>		2021-12-28	0 Years 1 Month(s)

## Further Context

- On the vaccination event page on the **Details** tab, there is a view that shows a centralized view of all clients that are linked to the VE with their dose administration record status, service status, and other client information. To view this report, go to the VE record you are interested in, scroll down to the *Report Links* section, and select the *Showing Clients for Vaccination Event* record.
- New immunizations cannot be created for the Inactive clients. An error message is displayed indicating the client must be active to proceed
- if the vaccination event Status is ‘Completed’ or ‘Cancelled’. An error message is displayed indicating the vaccination event is no longer active and new doses cannot be recorded.

## Best Practice

- **Consent for data collection** – before creating a new immunization record, ensure the client has given consent for data collection before proceeding to create a new immunization record in COVaxON. The consent for data collection can be recorded on the client screen. If the client has not given consent to data collection, you **cannot** proceed with recording the dose information in COVaxON. Follow the guidelines provided by your PHU (Public Health Unit). This is a mandatory checkbox. If the client does not

consent, no further data should be entered in into COVaxON and the user must close this screen and continue with the offline paper process.

- **Consent for follow-up communication** – additional consent information can be requested for the client to receive follow-up communications such as immunization receipt if they provide an email address and/or phone number.
- **Consent on the client’s behalf** – for youth/other clients who have a proxy/substitute decision maker consenting for them or for youth/other clients who are consenting on behalf of themselves. If a client proxy information exists on the Contact Information section of the Client screen and during the **New Immunization – Administered** flow a COVaxON user selects “I am consenting on the Client’s behalf, and **“I confirm that I am the client’s substitute decision-maker (e.g., parent, legal guardian).”** Then, the system will populate the proxy information on the client screen with the following fields on the New Immunization – Administered screen.
  - Proxy Name
  - Proxy Phone
  - Relationship to the Client
- The user has the option to clear the populated information and enter new or different proxy details if required on the dose information screen. The updated information will now be reflected in the **Contact Information** section on the **Client screen**. In addition, the changes will be recorded in the audit history log.

Contact Information			
Mobile	+16132610420	Home Phone	
Other Phone		Work Phone Ext.	
Email	krystalsnow35@gmail.com		
Preferred Method for Communication			
Preferred Language	English	Secondary Language	
Proxy Name	Jamezz Snow	Proxy Phone	(416) 000-0000
Relationship to the Client	Parent		

**Description:** Before proceeding to create a new immunization record in COVaxON, ensure the client is active and consents to data collection is recorded in COVaxON. Once recorded, create a new immunization record to document the dose administration information with tracked inventory in COVaxON.

**Note:** Once the consent for data collection is recorded once, users will no longer need to record it for subsequent doses administered.

1. On the *Person Account* page, click **New Immunization**.

2. A new window is displayed with the option to select the immunization record type you wish to create. The record type displayed is based on user profile and/or permission.
3. Select the **Administered - Point of Service** record type and click **Next**.

- If the client is already associated to a VE from the client page or vaccination event, the VE is auto populated in the **Vaccination Event** dropdown list. **Note:** If no VE is associated to the client record, select a VE from a list of active VEs linked to your organization from the lookup field and click **Next**.

The screenshot shows a form titled "New Immunization" with a sub-header "New Immunization - Administered - Point of Service". A dropdown menu for "Vaccination Event" is open, showing "ZZ-XBB" selected. Below the dropdown, a red message reads "Please ensure correct VE is selected". At the bottom right, there are "Previous" and "Next" buttons.

- Select a **Vaccine** from a list of associated **Vaccine Event Inventories** for the VE and click **Next**.

The screenshot shows a form titled "New Immunization" with a sub-header "New Immunization - Administered". A dropdown menu for "Select Vaccine" is open, showing "PFIZER-BIONTECH COVID-19 VACCINE mRNA (double) 0.9 ml - BGT9881, 2022-04-24" selected. At the bottom right, there are "Previous" and "Next" buttons.

- The **New Immunization – Administered Screen**

The screenshot shows a form titled "New Immunization" with a sub-header "New Immunization - Administered". It contains several checkboxes and dropdown menus. A red box highlights the checkbox "Pre-assessment completed, risks and benefits communicated with client", which is checked. Other visible fields include "Diluent" (set to "--None--"), "Route" (set to "Intramuscular / intramusculaire"), "Anatomical Site" (set to "--None--"), and "Dosage Administered" (set to "0.2"). At the bottom right, there are "Previous" and "Finish" buttons.

- The **Dose Information** page is displayed with the following fields:
- An added mandatory checkbox confirming that the COVID-19 Vaccine Information sheet has been reviewed with the client. If the client has a contraindication, an alert should be created on their record and the client should not receive the vaccine. The client can rebook their dose appointment for a later time.
- Pre-assessments are no longer required to be completed as part of the immunization flow, vaccinators must use their clinical knowledge to determine if the client should receive the vaccine and record the dose information.

10. If yes, enable the mandatory checkbox to indicate the Pre- assessment is completed, risks and benefit communicated with client.
11. Confirm that the Vaccine Information Sheet has been reviewed and the client consents to receiving the vaccine and all recommended doses in the series and populate the checkbox to confirm. Details on the Vaccine Information Sheet can be found **here**. If the vaccinator determines the client should not receive the vaccine, uncheck the Vaccine Information Sheet Information checkbox and the field below will be displayed.
  - **Reason vaccine was not administered (checkbox)** – if ‘No’ (client should not receive vaccine), indicate that the pre-screening assessment checkbox is complete with the **Reason Vaccination was not Administered** dropdown field on the client’s record. The selection would be ‘Immunization was contraindicated’ or ‘Practitioner decision to temporarily defer immunization’. Once populated, the client can then exit the location.

12. **Proxy Consent** (checkbox) – for youth/other clients who have a proxy/substitute decision maker consenting for them, follow the process outlined below by populating the **Proxy Consent** checkbox and the proxy information. Once the proxy information is recorded as part of the DA record, it will be pre-populated on the client screen
  - **Proxy Name\*** – (required field)
  - **Proxy Phone** – (optional field)
  - **Proxy Relationship to the Client\*** – (required field)

Consent on the client’s behalf (check box) on client’s page is Unchecked/Blanked out automatically when clients consent information (Proxy Name, Proxy Phone, Relationship to the Client) is removed. However, if the client’s consent information (



Proxy Name, Proxy Phone, Relationship to the Client) is manually entered on clients page, Consent on the client's behalf (check box) is automatically populated

13. **Vaccine** – text display of vaccine product selected from the VEI.
14. **Diluent Event Inventory\*** – (required field) COVIDSHEILD, Moderna, AstraZeneca and Janssen products do not require a diluent so this field will not populate, however if more than one diluent has been allocated to Vaccination Event, the system will not pre-populate a diluent, it will be defaulted to blank, and the user will have to manually select one from the drop-down list.
15. **Route\*** – (required field).
16. **Anatomical Site\*** – (required field).
17. **Dosage Administered** – if Moderna is the selected product, select the appropriate value from the dropdown list (i.e., 0.25 or 0.5). If another vaccine product is selected, otherwise a default dosage value is displayed for the selected product.
18. **Dosage Unit of Measure \*** – default value is 'ml'.
19. **Date and Time \*** – (defaults to current date/time) if entering a dose administration record after the vaccine has occurred, update the date and time accordingly. **Note:** Date/time cannot be set to a future date.
20. **Country Vaccine was Administered** – will be pre-populated as 'Canada'.
21. **Vaccination Event** – auto populated based on previous entry
22. **Administered By** – the value will be pre-populated with the logged-in user information and the user will have the ability to update the field value if required.
  - In the event two or more users exist with the same first and last name, the user will be required to look up provider name that is administering the vaccine.
  - **Other Clinician, Other Designation** – if the vaccinator's name is not available as an option when searching within the field, select 'Other Clinician, Other Designation' and manually enter the name of the vaccinator in the '**Administered By (Other)**' field. It is recommended to submit a request to the Information Technology Services (ITS) team (more details in the Further Context section below). The vaccinator's details should be entered here as: [First Name] [Last Name], [Designation OR Provider Role], [Professional License].
23. **Reason for Immunization\*** – (required field) auto-populated based on what was entered on the client page; however, it can be updated.
  - **Institution** field is **mandatory** only when the **Reason for Immunization** field involves a congregate living, long term care home, retirement home, or child and youth eligible population.
24. Note the institution field displays a text "search undefined" users can still perform a search, the text displayed will be removed in upcoming releases. Click **Finish**. A new client immunization record is created with a **Status** of 'Administered'.

**Note:** You can also locate the newly created immunization record and other immunization records for the client by clicking the Client Immunizations tab on the client page and by selecting the link from the list of immunization records displayed for the client.

### **CANVAS Research Communication Emails.**

CANVAS email will be sent out to the client after dose administration if client is consented for Research Communication and if 'consent for Research Communication' checkbox is enabled.

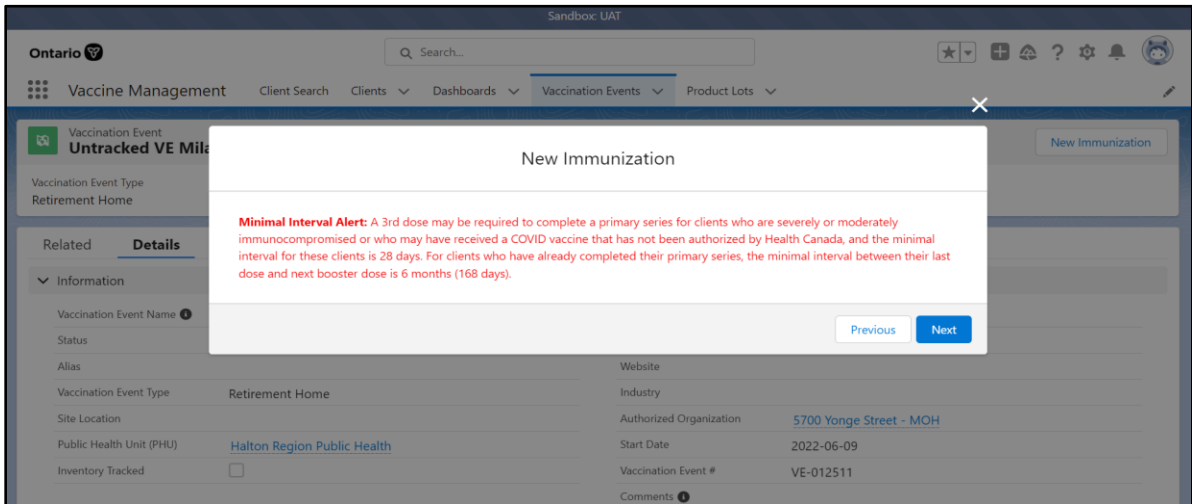
### Further Context

- Vaccinators can only administer doses to clients that are associated with a vaccination event (VE) within their AO. This will decrease the vaccine inventory lot associated with the AO for tracked inventory.
- The **naming convention** for each vaccine/diluent product lot is reflective of the information on the physical labels. For example:
  - Pfizer PFIZER-BIONTECH COVID-19 mRNA 0.3 ml - EK4175, 2021-03-31
  - Moderna MODERNA COVID-19 mRNA-1237 0.5 ml – RP0089, 2021-05-29
  - COVISHIELD COVID-19 COVISHIELD 0.5 ml – 0001, 2021-03-31
  - AstraZeneca ASTRAZENECA COVID-19 VACCINE 0.5 ml - 0008, 2021-06-30
  - Janssen JANSSEN COVID-19 VACCINE 0.5 ml – LM0997, 2021-05-29
- There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, service status, and other client information. To view this report, go to the VE record you are interested in, scroll down to the *Report Links* section, and select the **Showing Clients for Vaccination Event** record.
- Minimum product **intervals**:
  - Pfizer At least 19 days from the previous dose
  - Moderna At least 21 days from the previous dose
  - COVISHIELD At least 28 days from the previous dose
  - Janssen A single dose product (no minimum interval)
- Based on provincial guidelines, the AstraZeneca and COVISHIELD vaccines have been paused for first dose administration in Ontario. An error message will appear if a user tries to administer a first dose to a client.
- **Interchangeability for previous and next product types** – when administering a different product for a client’s next dose, the National Advisory Committee on Immunization (NACI) guidelines state that vaccine interchangeability is now permitted. Please note that there is no interchangeability warning message in the system. Please consult your site lead for additional clarity on when you might administer doses interchangeably and any further clinical questions you have.
- **Same Day Dose Administration** If more than one dose is being administered to a client within the same day, a warning message is displayed to user indicating a valid dose already exists for the client and if they wish to continue.
- Clients with a **Reason for Immunization** as ‘Child and Youth Eligible Population’ ( client aged 5-11) should receive Pfizer-BioNTech CORMINATY pediatric COVID-19 mRNA.
- Clients 6 months to <5 years age group the **Reason for Immunization** should be **“Age Eligible Population.”** for Moderna SPIKEVAX 0.1 mg/ml COVID-19 mRNA
- Any client aged 12-17 should receive Pfizer-BioNTech as their vaccine product.
- Currently the following product warning messages are displayed within the New Immunization flow.
  - Interval Warning messages are displayed for all the profiles (who have access to the New Immunization Flow). The warning messages will be displayed for all the products. The warnings are displayed for Point of Service (Administered and Administered – No VE) and Historical flows based on the following conditions:
    - 1) If Total Administered Doses = 1 (going into 2)  
Check if the latest dose was < 28 days  
If yes, then show warning screen with the following message:

**Minimal Interval Alert:** For the primary series, the minimal interval between doses is 28 days. If you are administering a Pfizer-BioNTech monovalent vaccine for children and infants 6 months to 4 years of age, the minimal interval between dose 1 and 2 is 21 days

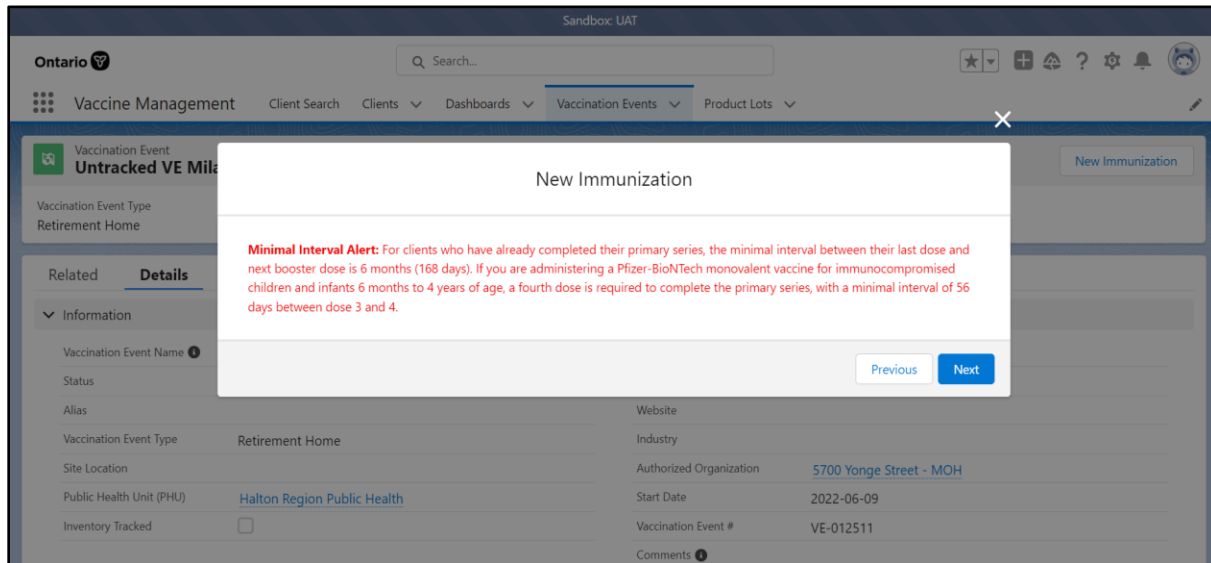
- 2) If Total Administered Doses = 2 (going into 3)  
Check if the latest dose was < 28 days  
If yes, then show warning screen with the following message:

**Minimal Interval Alert:** A 3rd dose may be required to complete a primary series for clients who are severely or moderately immunocompromised or who may have received a COVID vaccine that has not been authorized by Health Canada, and the minimal interval for these clients is 28 days. For clients who have already completed their primary series, the minimal interval between their last dose and next booster dose is 6 months (168 days).



- 3) If Total Administered Doses = 3+ (going into 4+)  
If the latest dose was (<168 days) - following error message is displayed:

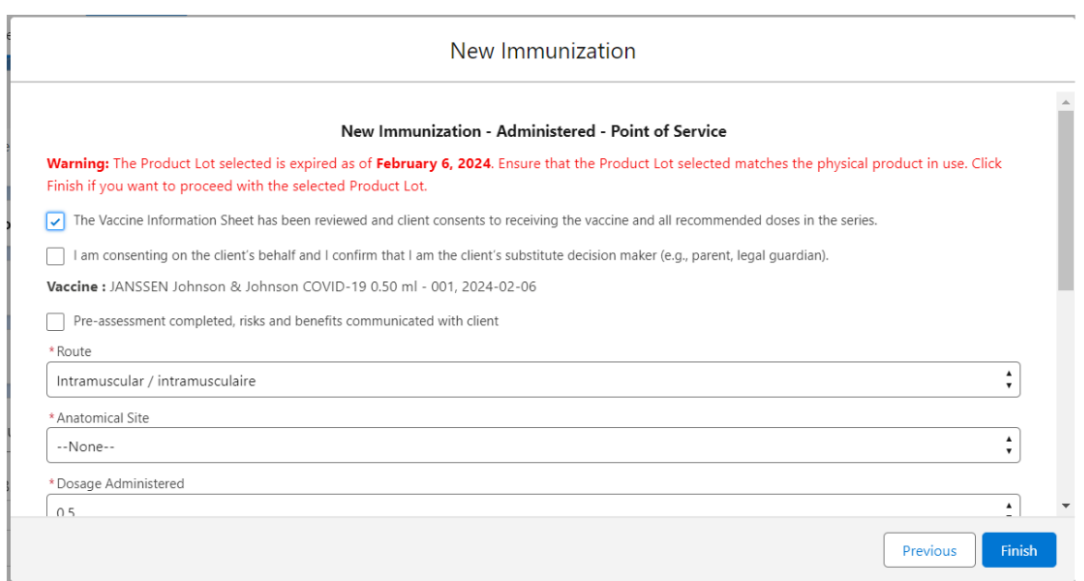
**Minimal Interval Alert:** For clients who have already completed their primary series, the minimal interval between their last dose and next booster dose is 6 months (168 days). If you are administering a Pfizer-BioNTech monovalent vaccine for immunocompromised children and infants 6 months to 4 years of age, a fourth dose is required to complete the primary series, with a minimal interval of 56 days between dose 3 and 4.



- 4) If the selected 'vaccine product lot' is expired, application displays warning message based on the following rules:

Adjusted date – If entered date is less than today's date.

Expiry date - if adjusted date is blanks and Expiry Date is less than today's date.



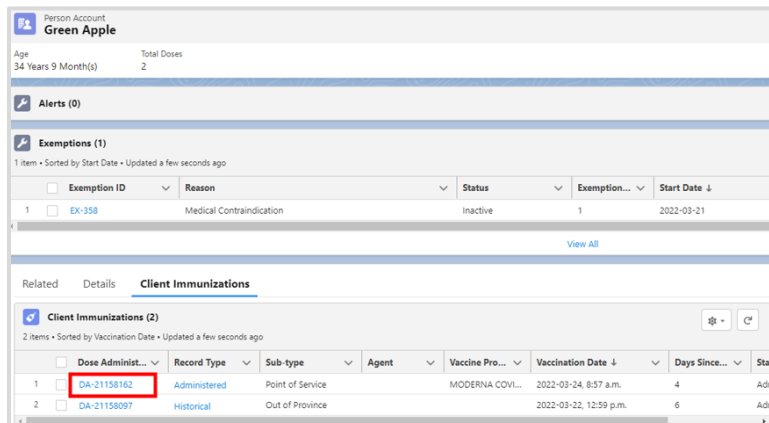
- User profile’s authorized organization** – if you are attempting to administer a dose to a client, your user profile should have access to the immunization flow and your AO must match the AO of the inventory being administered. Otherwise, you will be unable to select the inventory from the new immunization screen. The vaccination event (VE) on the client record must also match the VE inventory record. If you do not see any inventory values, this indicates that there is no inventory linked to the client’s VE.
- Provider information missing in Administered By field** – request your site lead to submit a request to Information Technology Services (ITS) for the creation of a provider not currently available in the **Administered By** field. Please have the provider validated by your site lead and have the details in the table below prepared prior to contacting your site lead:

Field	Field Entry															
<b>Provider First Name</b>	Free text – enter the First Name															
<b>Provider Last Name</b>	Free text – enter the Last Name															
<b>Provider Role</b> <i>(choose option)</i>	<table border="0"> <tr> <td>Medical Doctor</td> <td>Paramedic Practitioner</td> <td>Registered Midwife</td> </tr> <tr> <td>Medical Resident</td> <td>Pharmacist</td> <td>Registered Nurse</td> </tr> <tr> <td>Nurse Practitioner</td> <td>Pharmacy Student</td> <td>Registered Practical Nurse</td> </tr> <tr> <td>Nursing Student</td> <td>Pharmacy Technician</td> <td>Respiratory Therapist</td> </tr> <tr> <td>Other Designation</td> <td></td> <td></td> </tr> </table>	Medical Doctor	Paramedic Practitioner	Registered Midwife	Medical Resident	Pharmacist	Registered Nurse	Nurse Practitioner	Pharmacy Student	Registered Practical Nurse	Nursing Student	Pharmacy Technician	Respiratory Therapist	Other Designation		
Medical Doctor	Paramedic Practitioner	Registered Midwife														
Medical Resident	Pharmacist	Registered Nurse														
Nurse Practitioner	Pharmacy Student	Registered Practical Nurse														
Nursing Student	Pharmacy Technician	Respiratory Therapist														
Other Designation																
<b>Identifier</b>	Free-text – enter the Identifier Number															
<b>Identifier Type</b> <i>(choose option)</i>	<table border="0"> <tr> <td>Professional license number</td> <td>Provincial health human resource identifier</td> </tr> <tr> <td>Medical identification number of Canada</td> <td>Other identifier type</td> </tr> <tr> <td>Health regulatory college member number</td> <td></td> </tr> </table>	Professional license number	Provincial health human resource identifier	Medical identification number of Canada	Other identifier type	Health regulatory college member number										
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## 4. Review Immunization Record

**Description:** Once an immunization record is successfully recorded the **Status** is set to ‘Administered’ and the immunization details can be viewed on the *Person Account* page within the **Client Immunizations** tab.

1. On the *Person Account* page, select the immunization record from the **Client Immunizations** tab.



Exemption ID	Reason	Status	Exemption...	Start Date	
1	EX-358	Medical Contraindication	Inactive	1	2022-03-21

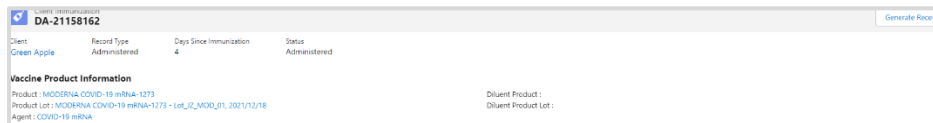
  

Dose Administr...	Record Type	Sub-type	Agent	Vaccine Pro...	Vaccination Date	Days Since...	Sta
1	DA-21158162	Administered	Point of Service	MODERNA COVI...	2022-03-24 8:57 a.m.	4	Adi
2	DA-21158097	Historical	Out of Province		2022-03-22, 12:59 p.m.	6	Adi

2. The *Immunization Details* page will display with the following sections and tabs:

**Note:** Sections are static across all tabs displayed on the page.

- **Client Immunizations** section:



Client	Record Type	Days Since Immunization	Status
Green Apple	Administered	4	Administered

Vaccine Product Information	
Product : MODERNA COVID-19 mRNA-1273	Diluent Product :
Product Lot : MODERNA COVID-19 mRNA-1273 - Lot_UJ_MOR01_2021/12/18	Diluent Product Lot :
Agent : COVID-19 mRNA	

- **Client** – displays the client's first and last name
- **Record Type** – ‘Administered’
- **Days Since Immunization** – displays the number of days count since the client received an immunization
- **Status** – displays the status of the immunization record ‘Administered’
- **Vaccine Product Information** section – displays the vaccine product information recorded during the immunization record flow:
  - **Product** – displays the vaccine product selected during the immunization flow and is hyperlinked to the *Vaccine & Product Details* page
  - **Product Lot** – displays the vaccine product lot selected during the immunization flow and is hyperlinked to the *Vaccine & Product Details* page
  - **Agent** – displays the agent name and is hyperlinked to the *COVID-19 mRNA* page
  - **Diluent Product** – displays the diluent if product selected during the immunization flow required a diluent and is hyperlinked to the *Diluent Product Details* page
  - **Diluent Product Lot** – displays the diluent if product lot selected during the immunization flow required a diluent and is hyperlinked to the *Diluent Product Details* page

- **Generate Receipt** button – generate a proof of vaccination receipt (refer to the **06 – Generate Receipt** job aid for more details)
- **Basic Details** tab – this tab displays information recorded during the immunization record flow

Basic Details		Consent & Assessment		Vaccine & Product Details		Files		History	
Client	Bob Ross TEST Client	Vaccination Event	Part 2 VE	Reason for Immunization	Age Eligible Population	Immediate AEFI	<input type="checkbox"/>	Source	Health Care Provider
Dose Administration	DA-21156258	Authorized Organization	Peel Public Health						
Sub-type	Point of Service								
Days Since Immunization	1								
Country Vaccine Administered	Canada								
<b>Dose Validation</b>									
Verification Status									
<b>System Information</b>									

- **Client** – displays the client’s first and last name, and links to the client page
- **Dose Administration** – displays the unique identifier number for the immunization record administered to the client
- **Sub-Type** – defaulted to ‘Point of Service’ for record type of ‘Administered’
- **Days Since Immunization** – displays the number of days since the client received an immunization
- **Country Vaccine Administered** – pre-populated as ‘Canada’
- **Vaccination Event** – pre-populated with the VE name recorded during the immunization record flow
- **Reason for Immunization** – pre-populated with the RIM value recorded during the immunization record flow, the RIM value can be updated on the immunization record.
- **Immediate AEFI** – editable field to record if the client experienced an AEFI; refer to section 4 ([Monitor for AEFI](#)) and section 5 ([Document Potential AEFI Occurrence](#)) in this job aid for additional information
- **Source** – defaulted to ‘Health Care Provider’ for record type of ‘Administered’
- **Authorized Organization** – pre-populated with the authorized organization for the logged in user
- **Dose Validation** section:
  - **Verification Status** – refer to section 9 ([Immunization Record Under Investigation](#)) for additional details
- **System Details** section:
  - **Created By** – displays the username of the logged in user who created the record, as well as date and timestamp
  - **Last Modified By** – displays the username of the logged in user who last modified the record, as well as date and timestamp

- **Consent & Assessment** tab – displays only read-only consent information recorded during the new immunization record flow.

The screenshot shows the 'Consent & Assessment' tab with the following sections:

- Client Consent:**
  - Consent for Service?
  - Consent on the client's behalf?
- Pre-Screening Assessment:**
  - Experienced myocarditis or pericarditis?
  - Shortness of breath or chest pain?
  - Symptoms of COVID?
  - Allergic Reaction to Covid 19 (if any)?
  - Vaccine within 14 days?
  - Therapy? Have you spoken to your MDC?
  - Have bleeding disorder, blood thinning?
  - Information Sheet Reviewed?
  - Pre-screening Assessment Completed?
  - Comments:
- System Information:**
  - Historical Pre-Screening Assessment
  - System Information

- **Consent for Service** – pre-populated as checked from immunization record flow
- **Consent on client's behalf** – pre-populated as checked from immunization record flow if data recorded
- **Pre- Assessment Risks and Benefit** – pre-populated as checked from immunization record flow if data recorded
- **System Details section:**
  - **Created By** – displays the username of the logged in user who created the record, as well as date and timestamp
  - **Last Modified By** – displays the username of the logged in user who last modified the record, as well as date and timestamp

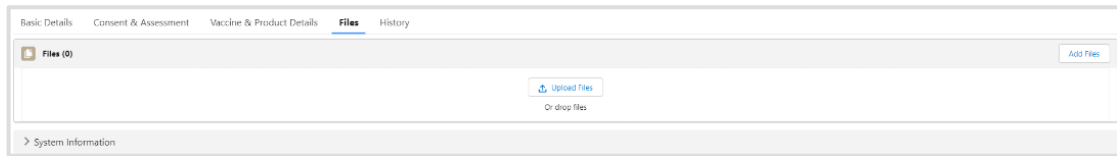
- **Vaccine & Product Details** tab – displays read only (for all profiles) vaccine and product information recorded during the new immunization flow

The screenshot shows the 'Vaccine & Product Details' tab with the following sections:

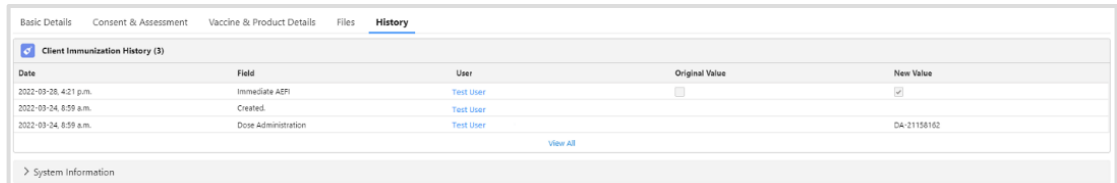
- Dose Details:**
  - Route: Intramuscular / Intramusculaire
  - Anatomical Site: Left deltoid / deltoïde gauche
  - Vaccination Date: 2022-03-28, 1:42 p.m.
  - Administered By: AARON SIDNEY FOOTE, Registered Nurse, 9483116
  - Dosage Administration: 0.5
  - Dosage Unit of Measure: ml
  - Administered By (Other):
- Clinical Guidelines Exception Details:**
  - Outside of Clinical Guidelines:
  - Reason for Exception:
- Inventory Details:**
  - Vaccine Event Inventory: MODERNA COVID-19 mRNA-1273 0.5 ml - Lot\_UZ\_MOD\_01\_2021-12-18
  - Site Location Vaccine:
  - Org Vaccine Inventory: MODERNA COVID-19 mRNA-1273 0.5 ml - Lot\_UZ\_MOD\_01\_2021-12-18
  - Vaccine Adjusted Expiration Date:
  - Diluent Event Inventory:
  - Site Location Diluent:
  - Org Diluent Inventory:
  - Diluent Adjusted Expiration Date:
- System Information:**
  - System Information

- **Dose Details section**
- **Clinical Guidelines Exception Details**
- **Inventory Details**
- **System Information**
- **Files** tab – provides users with the ability to upload required documents





- **History** tab – an audit tracking and log of changes to the dose record



## 5. Monitor for Adverse Events Following Immunization (AEFI)

**Description:** After a client has been immunized, they are instructed to wait for at least 15-minutes after their dose to monitor for symptoms of AEFI.

1. Client is monitored for AEFI throughout the 15-minute or longer, if asked.
2. Once the AEFI monitoring period is complete, locate the client record using the **Client Search** tab and search for the client record using their HCN (if applicable, sites can use a barcode scanner) or by other identifiers (e.g., last name, date of birth).
3. From the client’s record, confirm that the service status is ‘Administered’ and the **Total Administered Doses** number has increased by one dose. The **Total Administered Doses** field indicates the number of dose administration (DA) records that have been recorded for valid doses (with the DA record status of ‘Administered’).
4. Confirm the client’s identity by asking for their health card number (if possible), or by their name, plus any other identifiers such as date of birth or postal code and matching it to their record.

### Further Context

There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, if they experienced AEFI, and other client information. To view this report, go to the VE record you are interested in, scroll down to the *Report Links* section, and click the **Showing Clients for Vaccination Event** report.

## 6. Document Potential AEFI Occurrence

**Description:** If, during the 15-minute period the client waits after dose administration, an AEFI occurs, treat the client appropriately and document the occurrence in COVaxON by populating the AEFI checkbox in the immunization record. If the client does not experience an AEFI while at the location after their 15-minute wait, the AEFI checkbox should be left blank.

1. If an AEFI occurs, complete the AEFI report as per the Public Health Ontario AEFI Guidelines to record any potential AEFI details, and follow the public health guidelines.
2. Select the immunization record from the **Client Immunizations** tab on the client page. The client immunization record details page is displayed.

	Dose Administ...	Record Type	Sub-Type	Agent	Vaccine Product	Vaccination Date	Days Since...
1	<input type="checkbox"/> DA-20449837	Administered	Point of Service		PFIZER-BIONTECH COVID-19 VACCINE m...	2022-03-07, 11:58 a.m.	3
2	<input type="checkbox"/> DA-20449831	Administered - No VE	Point of Service		PFIZER-BIONTECH COVID-19 VACCINE m...	2022-03-03, 11:16 p.m.	6
3	<input type="checkbox"/> DA-20449830	Historical				2022-03-03, 11:01 p.m.	6
4	<input type="checkbox"/> DA-20449827	Administered	Point of Service		PFIZER-BIONTECH COVID-19 VACCINE m...	2022-03-03, 5:02 a.m.	7
5	<input type="checkbox"/> DA-20449826	Administered - No VE	Point of Service			2022-03-03, 2:11 a.m.	7
6	<input type="checkbox"/> DA-20449825	Administered	Point of Service		PFIZER-BIONTECH COVID-19 VACCINE m...	2022-03-03, 1:43 a.m.	7
7	<input type="checkbox"/> DA-20448790	Administered	Point of Service			2022-03-01, 12:00 p.m.	9
8	<input type="checkbox"/> DA-20449810	Administered	Point of Service		PFIZER-BIONTECH COVID-19 VACCINE m...	2022-02-25, 1:52 p.m.	13
9	<input type="checkbox"/> DA-20449802	Administered	Point of Service		JANSSEN COVID-19 VACCINE	2022-02-24, 3:36 a.m.	14
10	<input type="checkbox"/> DA-20449801	Administered	Point of Service		JANSSEN COVID-19 VACCINE	2022-02-24, 2:53 a.m.	14

3. On the **Basic Details** tab, select the pencil icon to update the **Immediate AEFI** checkbox to record that the client had experienced an AEFI. (If an AEFI did not occur, leave the checkbox blank.)
4. Click **Save**.

**Client Immunization**  
**DA-20449837**

Client: Chris Morris | Record Type: Administered | Days Since Immunization: 3 | Status: In Progress

**Vaccine Product Information**  
 Product: PFIZER-BIONTECH COVID-19 VACCINE mRNA | Diluent Product: PFIZER Diluent 0.9% Sodium Chloride  
 Product Lot: PFIZER-BIONTECH COVID-19 VACCINE mRNA - 23232, 2021/09/18 | Diluent Product Lot: PFIZER Diluent 0.9% Sodium Chloride - 7777, 2022/03/05  
 Agent: COVID-19 mRNA

**Basic Details** | Consent & Assessment | Vaccine & Product Details | Files | History

**Basic Details**

Client: Chris Morris | Dose Administration: DA-20449837 | Sub-Type: Point of Service | Days Since Immunization: 3 | Country Vaccine Administered: Canada

Vaccination Event: Abby VE | Reason for Immunization: Age Eligible Population

**Immediate AEFI**

Source: Toronto Hospital | Authorized Organization: Toronto Hospital

Health Care Provider:

Verification Status:

Buttons: Cancel, **Save**

- The AEFI checkbox is updated on the client record.



Vaccine Related	
Any Adverse Events After Immunization?	<input checked="" type="checkbox"/>

### Further Context

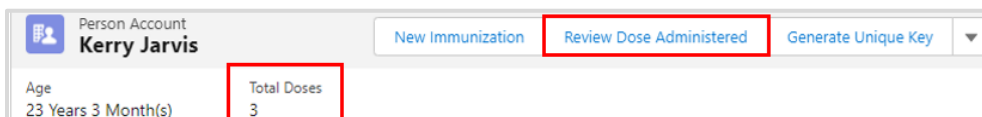
- The AEFI checkbox should only be populated if an AEFI occurs during the 15-minute wait time. If an AEFI occurs after the client has left the location (i.e., in the following days/weeks) it should not be recorded in COVaxON.
- Vaccinators, site staff, and site super users can enter an alert on a client's record to document any key details related to the client that would be helpful for future dose administration.
- When the inventory hits zero (0) doses available, the Inventory status will change to 'Completed'. Contact your inventory manager in this case so they can adjust the inventory appropriately.

## 7. Change the Status of an Immunization Record – Review Dose Administered

**Description:** The dose administration (DA) record status may be changed by a Vaccinator, PCP Vaccinator, Clinic Coordinator, and Site Super User and user with permission set Review Dose Administered from 'Administered' to 'Invalid', 'Invalid SCT and CAR-T', 'Inventory Recalled', 'Entered in Error', or 'Error – No Consent for collection in CovaxON' based on the 5 scenarios outlined in the [chart](#) below.

The dose administration (DA) record status may also be changed from 'Error – No Consent for collection in CovaxON' back to 'Administered'.

- Select **Review Dose Administered** button from the top right corner of the client record page.



Person Account <b>Kerry Jarvis</b>		New Immunization	<b>Review Dose Administered</b>	Generate Unique Key	▼
Age 23 Years 3 Month(s)	Total Doses 3				

- Select the DA record that requires a status update and from the dropdown menu select the **Reason** for the status change. Click **Next**. Select the reason to change the status, which will be reflected in the status of the record (refer to the [table](#) below summarizing how each status should be used).

- Another popup screen with a confirmation message will be displayed. Click **Finish** to complete.

- The client’s **Total Administered Doses** count will decrease based on the administered dose status that was changed. The **Total Dose** field indicates the number of dose administration (DA) records that have been recorded for valid doses (with the DA record status of ‘Administered’).

### Note: Reviewing Doses Across AOs

Limited number of COVaxON Users with profile ‘Covax Site Super User’ can use the Review Dose Administration functionality across AOs. Such users will have the ability to update administered dose status value to ‘Invalid’, ‘Entered in Error’, ‘Invalid SCT and CAR-T’, ‘Error – No Consent for collection in Covax,’ and ‘Inventory Recalled’ as a part of the review dose flow.

### Dose Status Options

Dose Status	Scenario for Dose Status Change	Result
Invalid	<p>If there is a clinical issue related to the DA record, the status of that record should be changed to ‘Invalid’. For example:</p> <ul style="list-style-type: none"> <li>The client received a dose given too soon.</li> <li>The client will need to return to be vaccinated again. Refer to the product monograph or NACI guidelines for additional details regarding next steps for client re-immunization (provided in the MOH clinical package).</li> </ul>	Does not adjust inventory

Dose Status	Scenario for Dose Status Change	Result
Invalid SCT and CAR-T	If there is a client who has received SCT or CAR-T, the previous doses received should be reviewed and the status updated to 'Invalid SCT and CAR-T'. For additional details, please refer to the MOH clinical guidance documents.	
Error – No Consent for collection in CovaxON	<p>Error – No consent for collection in CovaxON is added for the client immunization record status, for the scenario that a client’s immunization data was entered into COVaxON even though the client did not consent to the collection of their data. The impact of applying the status ‘Error - No consent for collection in COVaxON’ is that the client immunization record will not be sent to any external system, including the provincial portal. The client will not be able to retrieve their Enhanced Vaccine Certificate with the QR code.</p> <p>Note that this status can be reverted to ‘Administered’ if a client changes their mind and consents to having their data in the system. This may occur if a client needs to retrieve their Enhanced Vaccine Certificate with the QR code or submits an individual access request.</p>	
Inventory Recalled	If a product lot is recalled, the status of the DA record should be changed to ‘Inventory Recalled’. For example, if it was identified that a particular lot has shown to be ineffective, the client will need to return to be vaccinated again. Refer to the product monograph or NACI guidelines for additional details regarding next steps for client re-immunization (provided in the MOH clinical package). The <b>Detailed Dose Client &amp; Dose Admin</b> report (available to site super users) can be used to identify clients administered with the recalled inventory.	
Entered in Error	<p>If a DA record is created in error (and that dose was not physically received by the client), the status of that record should be changed to ‘Entered in Error’. For example:</p> <ul style="list-style-type: none"> <li>• If the dose was already administered to the client and logged in COVaxON, so the new DA is a duplicate. This is for historical client records as the system currently prevents duplicate doses.</li> <li>• The client record already existed, but a duplicate client record was created with a new DA record.</li> <li>• Vaccinator accidentally recorded the dose administration to the wrong client record instead of the client presently being vaccinated. In this case: <ul style="list-style-type: none"> <li>• On the <b>wrong</b> client – follow the process to change the status of that client to ‘Entered in Error’. Then follow the proper dose administration flow when that client receives their dose.</li> <li>• On the <b>correct</b> client – search and find the correct client using identifiers such as HCN, date of birth, etc. Enter the dose administration for that client.</li> </ul> </li> </ul>	1 dose gets added back to the Doses Available Inventory

### Best Practice

It is recommended to use 'Clinical Notes' field to document the reason and why the dose status change is needed. An authorized user can change the status value from 'Administered' to 'Entered in Error'. If a dose status value is updated from 'Administered' to 'Entered in Error', the dose will be returned to the inventory of the AO it belongs to (i.e original AO that administered this dose).

- The client's **Total Administered Doses** count will decrease based on the administered dose status that was changed.
- There is one additional status 'Wasted' displayed on the drop-down list. This status should **not** be used.
- It is not recommended to make any changes to DA records while the client is in the middle of the dose administration process.

**Scenario:** Only applicable when reviewing Dose Across AO

If an administered dose needs to be corrected, it should be flagged as 'Entered in Error' and re-entered as a Historical record with Subtype value equal to 'other' followed by correct dose information including the 'lot number' of the original dose

## 8. Proof of Vaccination

**Description:** To generate a receipt for the administered dose please refer to the **06 – Generate Receipt** job aid.

## 9. Immunization Record Under Investigation

**Description:** The **Verification Status** field on the immunization record indicates if a record is under investigation on suspicion of vaccine validity. The field is read-only for all user profiles except for a profile granted permission as a 'Fraud Investigator'.

The field contains the following dropdown values:

- **Under Review** – assigned if a DA record is being reviewed under suspicion of fraud
- **Determined Invalid** – assigned if the DA record has been deemed invalid due to the outcome of an investigation
- **Review Completed** – assigned if review is completed and the DA record is not deemed fraudulent

A user with 'Fraud Investigator' permission will have access to edit this field by clicking on the **pencil icon** (which will be visible to a user profile with the 'Fraud Investigator' permission).

Basic Details		Consent & Assessment	Vaccine & Product Details	Files	History
<div style="background-color: #f2f2f2; padding: 5px;"> <span>▼ Basic Details</span> </div>					
Client	Bob Ross TEST Client				
Dose Administration	DA-21158258				
Sub-type	Point of Service <span style="float: right;">✎</span>				
Days Since Immunization	1				
Country Vaccine Administered	Canada				
<div style="background-color: #f2f2f2; padding: 5px;"> <span>▼ Dose Validation</span> </div>					
Verification Status	Under Review <span style="float: right;">✎</span>				
<div style="background-color: #f2f2f2; padding: 5px;"> <span>&gt; System Information</span> </div>					

**Note:** The field is displayed on the immunization record for ‘Administered’ and ‘Historical’ record types.

## Appendix A | 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 a COVID-19 vaccine that is administered in addition to the two (2) previous COVID-19 vaccine doses that a client has received. This means that a client has received an extra dose(s) if they receive three (3) more doses of the same COVID-19 vaccine product. They have also received an extra dose(s) if they have received three (3) or more of a combination of COVID-19 vaccines (since certain COVID-19 products have been administered interchangeably).

**Note:** For **eligibility criteria and Reason for Immunization**, please refer to the MOH website for guidance located [here](#).

## Appendix B | Client Record Profiles and Access

User Profile	Create	Read	Review Dose	Edit	Delete
COVax Site Super User	✓	✓	✓	✗	✗
COVax Vaccinator	✓	✓	✓	✗	✗
COVax Site Staff	✗	✓	✗	✗	✗
COVax PCP Vaccinator	✓	✓	✓	✗	✗
COVax Inventory Manager	✗	✗	✗	✗	✗

## Appendix C | Offline Document Process

**Description:** There are 4 situations whereby data cannot be captured in COVaxON, and offline 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 does not consent to data collection during check-in. 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 in 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 product. They are contained within the MOH SharePoint site. There is a dedicated contact per location that has access to the SharePoint and can disseminate the documents.

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